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Carmarthenshire Retail Study Update

Final Report

Carmarthenshire County Council

16 January 2023

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1.0 Introduction

1.1 Carmarthenshire County Council commissioned Lichfields to prepare an update of the county wide Retail Study. This study update is expected to form part of the emerging Carmarthenshire Revised LDP's evidence base. Lichfields prepared the Council's original Retail Study in 2009, which was updated in 2015. This study informs future policy relating to town centre, retail and leisure matters in Carmarthenshire, together with a wider strategy for the future of the County's centres up to 2037.

Aims and objectives of the Study

1.2 The key objectives of the study update are as follows:

1. to undertake an analysis of key trends regarding retailing and town centre activity to provide context;
2. to consider the up-to-date position in respect of relevant retail and town centre planning policy, particularly with reference to Future Wales, Planning Policy Wales and TAN 4;
3. to provide an overview of Carmarthenshire's town centres;
4. a need assessment for convenience and comparison goods retail;
5. assessments of the potential for other town centre uses (e.g. commercial leisure and A3 food/beverage uses);
6. identify the implications for Carmarthenshire's town centres in terms of floorspace projections and the hierarchy of centres; and
7. to provide an evidence base that is sufficiently robust to withstand the development plan examination process and sufficient to support development management decisions.

Report structure

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

1.4 Section 3 examines the existing hierarchy of centres including a review of the 9 main centres in the County.

1.5 Section 4 sets out an update of the retail floorspace capacity assessment based on the latest available population and expenditure projections. It also provides a floorspace capacity assessment for Class A3 food/beverage uses.

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

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

1.8 Section 7 summarises the main conclusions and recommendations.

2.0 National Policy and Recent Trends

National Planning Policy

Planning Policy Wales

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

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

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

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

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

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

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

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

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

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

2.6 PPW states that first preference should be to locate new retail and commercial development within a retail and commercial centre designated in the development plan's hierarchy of centres. On enabling vibrancy of centres, PPW paragraph 4.3.35 states that:

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

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

Future Wales: The National Plan 2040

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

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

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

2.11 Each development should be assessed on its own merit against criteria that should be established in the development plan. These criteria may include matters such as:

1 the quantum and nature of the use;

2 is the use acceptable in the town centre without having an unacceptable impact on existing operators and residents;

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

4 it is up to the applicant to provide robust justification as to why development cannot locate within the town centre.

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

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

2.14 Carmarthenshire is in the Future Wales South West Region. Llanelli is also within one of the three National Growth Areas (Policy 28 Swansea Bay and Llanelli). This area will be the focus for strategic economic and housing growth, including essential services and facilities. National Growth Areas are complemented by Regional Growth Areas including Carmarthen (Policy 29). Sustainable growth is supported in Carmarthen, which has an important sub-regional function.

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

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

2.16 The Welsh Government highlights the key planning policies and tools that should be used by all sectors in the environmental, social, cultural and economic recovery of Wales, recognising the continuing need for planners to operate within a wider context of priorities and actions.

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

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

- *staying local: creating neighbourhoods;*
- *active travel: exercise and rediscovered transport methods;*
- *revitalising our town centres;*
- *digital places – the lockdown lifeline; and*
- *reawakening Wales's tourism and cultural sectors.*

Permitted Development within Town Centres

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

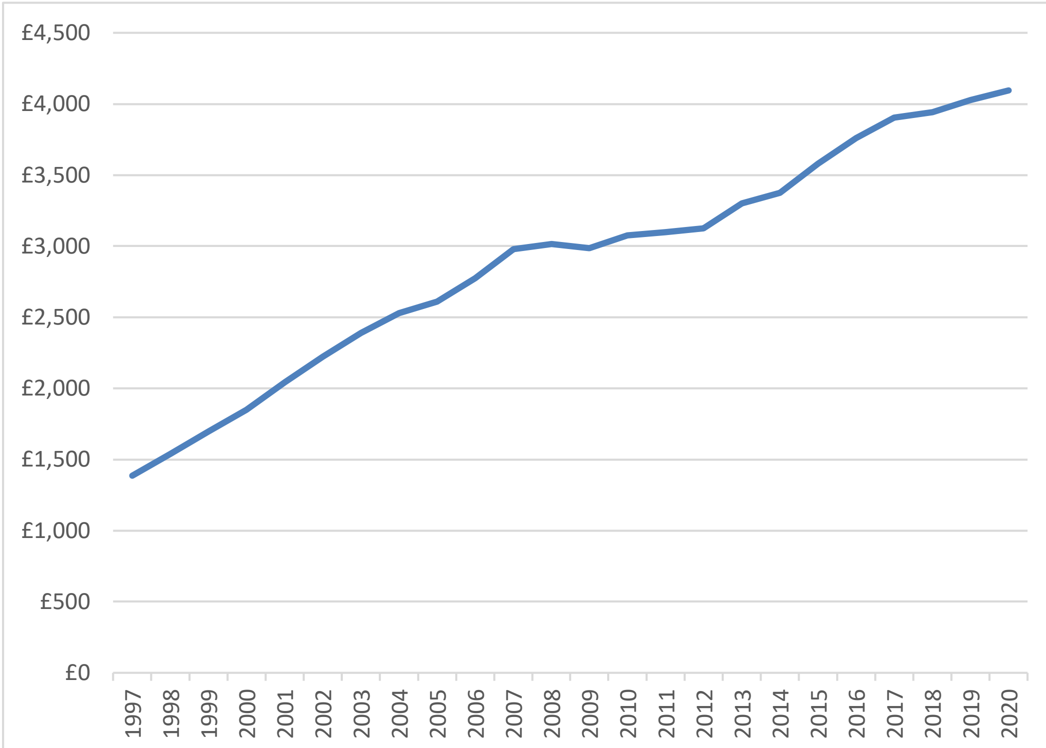
2.20 The rapid changes that are affecting the retail sector and town centres are acknowledged and reflected in Future Wales, PPW (Edition 11), Building Better Places and temporary permitted development rights for town centre uses introduced by Welsh Government. These recognise that diversification is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

Implications of Brexit, Covid-19 and other trends

2.21 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. Experian is a data provider most often used in evidence base studies. Experian provides consumer expenditure data and other economic forecasts.

2.22 The growth in expenditure per person on comparison retail goods between 1997 and 2020 is shown in Figure 2.1. High growth between 1997 and 2008 fuelled demand for new retail floorspace. Since the last recession in 2009 expenditure growth has been much slower and the demand for retail floorspace has reduced, particularly comparison goods floorspace.

Figure 2.1 UK growth in comparison goods expenditure per head (constant 2018 prices)



Source: Experian Retail Planner Briefing Note 19 (January 2021) – Appendix 4b

2.23 Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to continue to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (2021 and 2022) for retail and leisure now reflect the expected effects of Brexit and the Covid-19 pandemic. The current cost of living crisis is also likely to suppress expenditure growth in the short term.

2.24 The main implications of Brexit, Covid-19 and the cost of living crisis for the evidence base are likely to be as follows:

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

2.25 The key uncertainties relating to the first two points are primarily the length of Covid-19 and the cost of living crisis and recovery period. The longer-term structural implications are harder to predict and quantify at this stage, however there are already signs of a bounce back in terms of expenditure growth, but the cost of living crisis may suppress this bounce back.

2.26 In the short term, operators have faced elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit. Short-term supply chain disruption led to inflationary pressures, which will have an impact on consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery benefitted in the short-term. There is likely to be a long-term structural shift to multi-channel shopping, reducing the demand for physical space within town centres.

2.27 Bearing these trends in mind there has been a spike in town centre vacancies with unfortunately some businesses failing to re-open following the Covid lockdowns, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost of living crisis are likely to exacerbate difficult trading conditions. Many national operators have already announced job losses and store closures.

2.28 Brexit and Covid-19 could have short-term impacts in terms of population migration levels and a pause in construction activity. Given that the focus of this update is to assess the long-term need over the new local plan period within five-year interval projections (i.e. base year to 2027, 2027 to 2032 and 2032 to 2037), development plan policy should assume population projections will return to projected levels by 2027. The first interval population projections in 2027, and certainly later years, should not be significantly affected by the Covid-19 crisis. It is not yet possible to understand if the short-term impact will continue into the medium and longer term projections to alter previous trends to any greater extent. This study has adopted Experian's latest 2020 population projections.

2.29 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. After January 2021, sales had recovered to 9% above pre-Covid levels by April 2021. The seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.

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

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

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

2.33 Experian's Retail Planner Briefing Note (January 2022) suggests non-store retailing's market share increased from 20.5% in 2019 to 30.2% in 2021. Comparison non-store sales increased from 24.3% to 35.5% and convenience good sales increased from 13.7% to 20.9%. However, Experian expect these figures will fall during 2022 i.e. 31.9% for comparison goods sales and 19.1% for convenience good sales. Nevertheless, the 2022 figures remain significantly higher than pre-Covid market shares in 2019.

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

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

Long-term expenditure trends

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

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

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

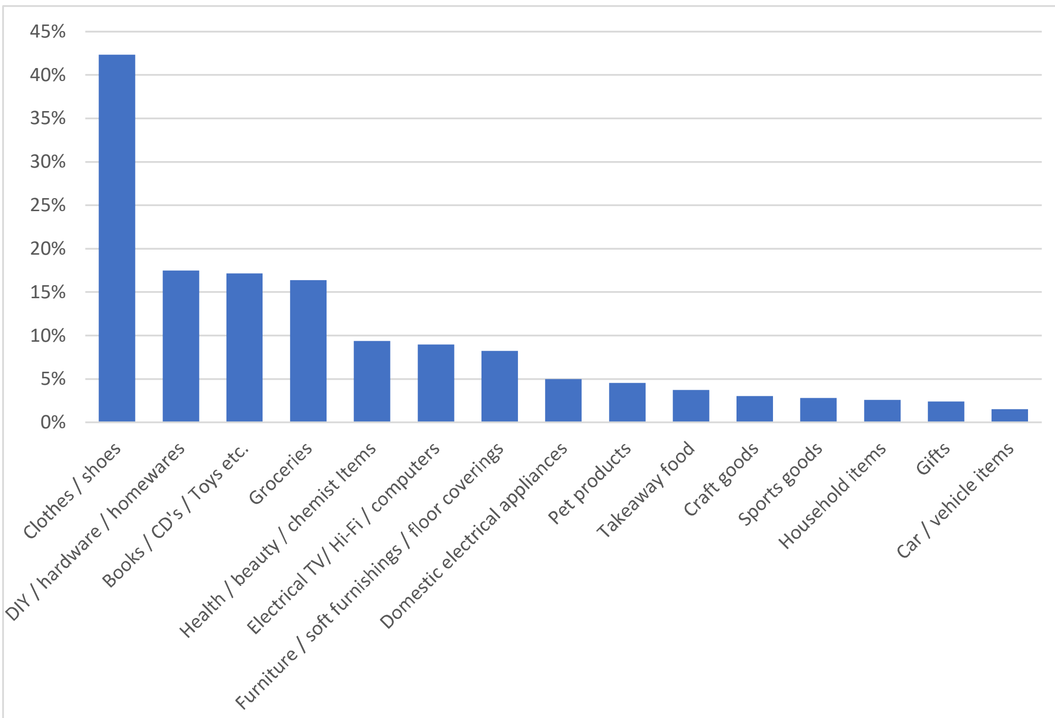
2.39 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular.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

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

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

2.41 The household survey results (October 2022) suggest 28% of respondents do most of their household's non-food shopping on-line. The household survey results indicate that 9.1% of households did their last main food and grocery shop via the internet/delivery. The household survey results indicate many households regularly buy items from the internet for home delivery. Over three quarters of respondents regularly use the internet for shopping or services. The main products/services purchased by households online are shown in Figure 2.2.

Figure 2.2 Items regularly purchased online in Carmarthenshire (% of all respondents)



Source: NEMS household telephone survey results October 2022

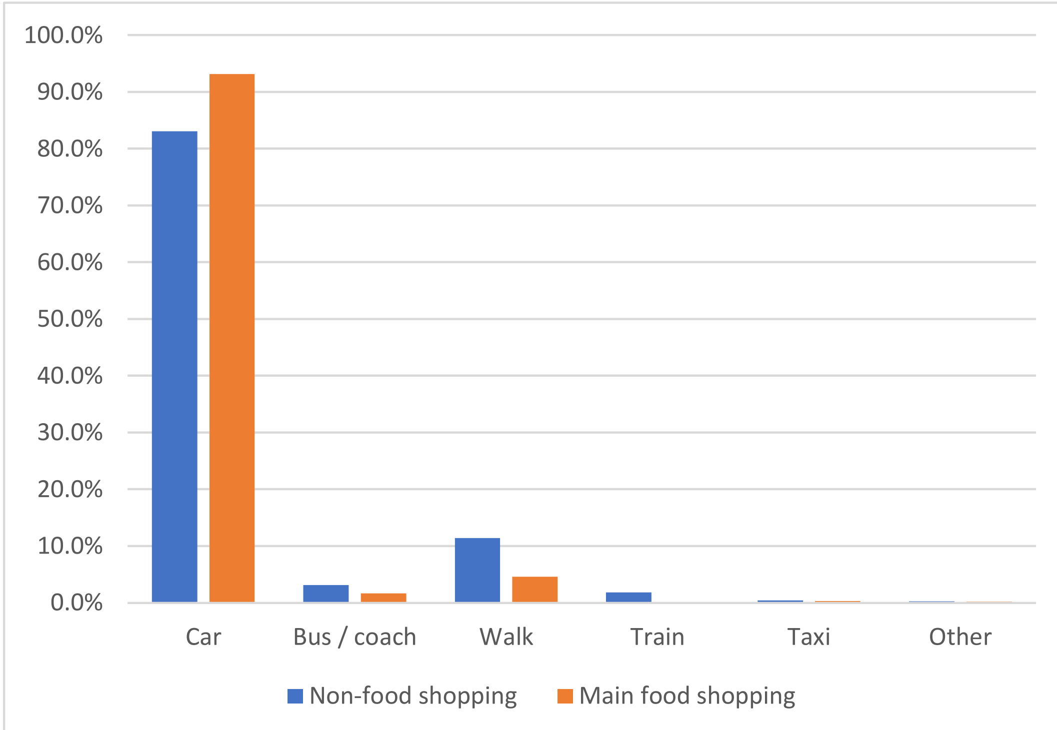
2.42 These survey results indicate that a wide range of goods are purchased on-line, but clothing /footwear are most often purchased online.

2.43 **Mode of travel and frequency of trips**

2.44 As indicated above, 28% of respondents do most of their non-food shopping on-line and 9.1% did their last main food and grocery shop via the internet/delivery. Experian suggests over 27% of retail sales is via non-store activity. These figures suggest many households do not need to travel to undertake food and non-food shopping.

2.45 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 2.3. Shopping by car (driver or passenger) is still the most popular mode of travel in Carmarthenshire for both non-food and main food shopping trips.

Figure 2.3 Mode of travel for non-food and main food shopping in Carmarthenshire (% of travelling households)



Source: NEMS household telephone survey results October 2022

2.46 Car usage for non-food and main food shopping is relatively high. Based on Lichfields' recent experience, car usage is lower within large towns and higher in rural areas i.e. normally over 80% of households for main weekly shopping. Car usage is generally higher for main food shopping than for non-food shopping because many households undertake bulk food and grocery shopping trips by car.

Demand for town centre floorspace

2.47 In the past lower expenditure growth and deflationary pressures (i.e., price cutting) in the non-food sector have had an impact on the high street. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased to 14.7% in 2021. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, Brexit and the growth in on-line shopping. The more recent impact of higher inflation and the cost of living crisis is also likely to constrain consumer demand, which may affect the demand for floorspace at least in the short term.

2.48 Carmarthenshire Council's town centres land use survey in 2022 indicated the number of vacant units in the 9 main centres was 252. The average shop unit vacancy rate was 20.5% (Note - this figure excludes Class B, D1/D2 and residential uses). The shop unit vacancy rate is higher than the UK pre-Covid-19 average (12.4%) and the current post-Covid UK average (14.7%).

2.49 The Council's land use surveys suggest the number of vacant units increased from 184 in 2018 to 252 units in 2022, perhaps due to the impact of Covid-19. This recent vacancy increase is consistent with UK trends. The underlying increase in vacant units across the

UK is primarily due to the reduction of comparison goods retail outlets. The decline in the number of comparison goods retail outlets within town centres has been evident in Carmarthenshire's centres. The Council's latest 2022 land use survey suggests the number of comparison goods shops in the main centres is 377 outlets, less than 31% of all shop/ service units. The 2022 number of food/beverage and non-retail service uses is 521 outlets, over 42% of all shop units. In most centres, non-retail services have helped to replace lost comparison goods retail outlets.

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

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

Food store operators

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

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

2.54 Several proposed larger food superstores have not been implemented across the country. There has been a move away from larger stores to smaller formats, reflecting changes in customers' shopping habits i.e. more frequent but smaller food and grocery shopping trips. This trend may have increased with more home working during the pandemic lockdowns, but may move back to pre-Covid levels in the future.

2.55 The expansion of European discount food operators Aldi and Lidl has been rapid during the last two decades. These operators are now competing more directly for market share with other main food store operators. Home Bargains and B&M has also expanded rapidly in recent years. These trends are evident in Carmarthenshire with 4 Lidl stores, 4 Aldi stores, 2 B&M stores and 5 Home Bargain stores. There are current planning applications for further Lidl and Aldi stores in Ammanford and Llanelli.

Comparison retailers

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

2.57 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on some retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This trend has also led to the relocation of retailers to out of centre locations, creating more vacant units in town centres. The discount sector has occupied many units on retail parks e.g. Home Bargains, Poundland and B&M Bargains.

2.58 The retail warehouse sector is well represented in Carmarthenshire with a concentration of stores at Trostre Retail Park and Parc Pemberton in Llanelli, Pansarn Retail Park in Carmarthen and Cross Hands Business Park. These locations provide a wide range of bulky and non-bulky comparison goods products.

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

2.60 In general, operator demand for space has decreased significantly during the last 5 years and, of those national multiples looking for space, many prefer to locate in larger centres e.g. Swansea and Cardiff. Most of the centres in Carmarthenshire are at a lower level in the hierarchy and multiple operator demand may be much less in these centres in the future. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Polarisation of investment in the larger centres is likely to continue in the future, with many retailers reducing their overall number of outlets.

2.61 The continuation of these trends will influence future operator space requirements in Carmarthenshire with smaller vacant units and lower tier centres continuing to be less attractive for new multiple occupiers, and retailers increasingly looking to locate into larger units in larger town centres. However, smaller vacant units could still be attractive to independent traders and non-retail services looking to serve local catchment areas.

Charity and discount shops

2.62 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will end. Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (Class A1). In many centres, charity shops have occupied other vacated shop premises during previous recessions. This trend is evident in Carmarthenshire with a reasonable presence of charity shops in most centres.

2.63 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers.

Non-retail services

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

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

2.65 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities. These trends have not been particularly evident in Carmarthenshire. The proportions of betting shops and hot food takeaways are relatively low when compared with the UK averages, except for takeaways in Burry Port and St Clears town centres.

The evening economy

2.66 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

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

2.68 The key categories for food and beverage offer are:

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

2.69 The proportion of non-retail uses within town centres across the UK increased significantly before the Covid crisis. This trend is evident in Carmarthenshire with a reasonably high proportion of non-retail services in most town centres.

Pop-up spaces

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

Summary

2.71 The trends and changes highlighted in this section, including the growth of home shopping are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants.

2.72 There have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required. The move towards vibrant mixed use town centres has been recognised by Welsh Government in the latest version of PPW, Building Better Places and the recent temporary changes to permitted development rights (with the potential for these to become permanent in the future).

2.73 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad UK shop vacancy rate increased to over 14% during the last recession but did not return to pre-recession levels (around 8%). The UK vacancy rate is now nearly 15% and may increase further due to the impact of Covid-19 and the cost of living crisis, and therefore a cautious approach to future growth is required.

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

3.0 Hierarchy of centres

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

Carmarthenshire and the surrounding area

3.2 Carmarthenshire is adjoined by several other Local Authority Areas:

- Pembrokeshire to the West;
- Ceredigion to the North;
- Powys to the East;
- Swansea City and Neath/Port Talbot to the South-East.

3.3 Carmarthenshire's close proximity to Swansea provides opportunities and constraints with regards to the retail centres in the south east of the County. Haverfordwest is the main competing town centre to the west but is approximately 30 miles from Carmarthen. Brecon is about 20 miles to the east of Llandovery. The large distances between competing centres has helped centres within Carmarthenshire maintain a loyal customer base and viable role.

3.4 The Deposit Revised Local Development Plan 2018-2033 set out the retail and town centres hierarchy in the County at Policy SP2 (Retail and Town Centres), which designated Carmarthen as a Sub-Regional – High Order Town Centre at the top of the hierarchy. Llanelli and Ammanford are Mid Order Town Centres at the next level. Six centres were designated as Lower Order Town Centres at Burry Port, Llandeilo, Llandovery, Newcastle Emlyn, St Clears and Whitland. Policy SP2 sought to enhance and maintain the vitality and viability of these centres, including widening the range of shopping and service uses. The plan also identified four regional centres (Retail Parks), as follows:

- Stephens Way and Parc Pensarn, Carmarthen;
- Parc Trostre and Parc Pemberton, Llanelli;
- Cross Hands Retail Park; and
- Maes Yr Eithin Retail Park, Cross Hands.

3.5 The suitability of this designated hierarchy is set out in this Section.

3.6 In 2017 the Javelin Group's Venuescore ranked over 3,500 retail destinations in the UK including town centres, malls, retail warehouse parks and factory outlet centres across the country. Each destination was given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score attached to each retailer was weighted depending on their overall impact on shopping patterns, for example a department store will achieve a high score. The data for centres in South West Wales are shown in Table 3.1.

Table 3.1 Venuescore Ranking of Centres in South West Wales

Centre	Venuescore	UK Rank	Market Position Classification
Cardiff	516	6th	Upper Middle
Swansea	196	84th	Middle
Carmarthen	**147**	**153rd**	**Middle**
Llanelli, Parc Trostre Retail Park	**89**	**304th**	**Middle**
Neath	80	343rd	Lower Middle
Llanelli	**70**	**403rd**	**Lower Middle**
Haverfordwest	68	416th	Lower Middle
Aberystwyth	64	451st	Middle
Port Talbot	63	463rd	n/a
Brecon	43	710th	Middle
Haverfordwest, Withybush Retail Park	41	754th	Middle
Ammanford	**39**	**799th**	**n/a**
Swansea, Pontardulais Retail Park	35	912th	Middle
Llanelli, Parc Pemberton	**33**	**968th**	**Middle**
Swansea, Fforestfach Retail Park	33	968th	Middle
Tenby	32	1,008th	Middle
Gorseinon	30	1,074th	Lower Middle
Cardigan	27	1,187th	Lower Middle
Carmarthen, Parc Pensarn Retail Park	**22**	**1,418th**	**Middle**
Carmarthen, Pensarn Retail Park	**17**	**1,775th**	**n/a**
Pontardawe	17	1,775th	n/a
Lampeter	16	1,888th	Middle
Pontarddulais	16	1,888th	Lower Middle
Builth Wells	10	3,133rd	Middle

Source: Javelin's Venuescore 2017

3.7 Cardiff as a major regional city centre was at the top of the Venuescore ranking. Swansea and Carmarthen were next in the ranking, and had significantly higher scores than the other centres in the South West Wales. Llanelli and Ammanford had reasonably high scores, but much lower than Carmarthen. The six designated Lower Order Town Centres were not included in Javelin's analysis, because they are small centres with few multiple retailers. However, four of the large retail parks in the County had a relatively high Venuescore due to presence of multiple retailers.

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

3.9 This Javelin information was used in retail hierarchy terms to assess the relative strength of shopping destinations. The market position measured the degree each venue's offer as a high-end or discount focus (high=predominance towards high-end retailers; Low= predominance towards discount-oriented retailers).

3.10 Carmarthen had a "Middle" market position compared with Llanelli's "Lower Middle" market position, which suggests the latter catered predominantly for value for money/discount sectors. Ammanford did not have a market position rating because there were too few multiple fashion retailers within the centre.

3.11 Designated centres in Carmarthenshire are summarised in and compared in Table 3.2, based on the Council's land use survey in 2022. Table 3.2 excludes Class D1 and D2 leisure and community uses, Class C1/C2 and Class B employment uses.

Table 3.2 Carmarthenshire - Number of outlets by use (2022)

Centre/destination	Total retail service units	Class A1	Class A2 Financial/ Professional Services	Class A3 Food/ Beverage	Sui Generis Non-retail services	Vacant shop/ service units
Carmarthen	391	191	42	59	14	85
Llanelli	314	124	40	49	18	83
Ammanford	135	68	14	26	6	21
Burry Port	63	23	1	22	4	13
Llandeilo	82	54	12	9	0	7
Llandovery	75	39	6	13	2	15
Newcastle Emlyn	97	47	7	17	7	19
St Clears	43	22	2	10	3	6
Whitland	27	15	2	6	1	3
Main centres total	**1,227**	**583**	**126**	**211**	**55**	**252**
Cross Hands	89	46	5	14	10	14
Kidwelly	28	11	0	9	2	6

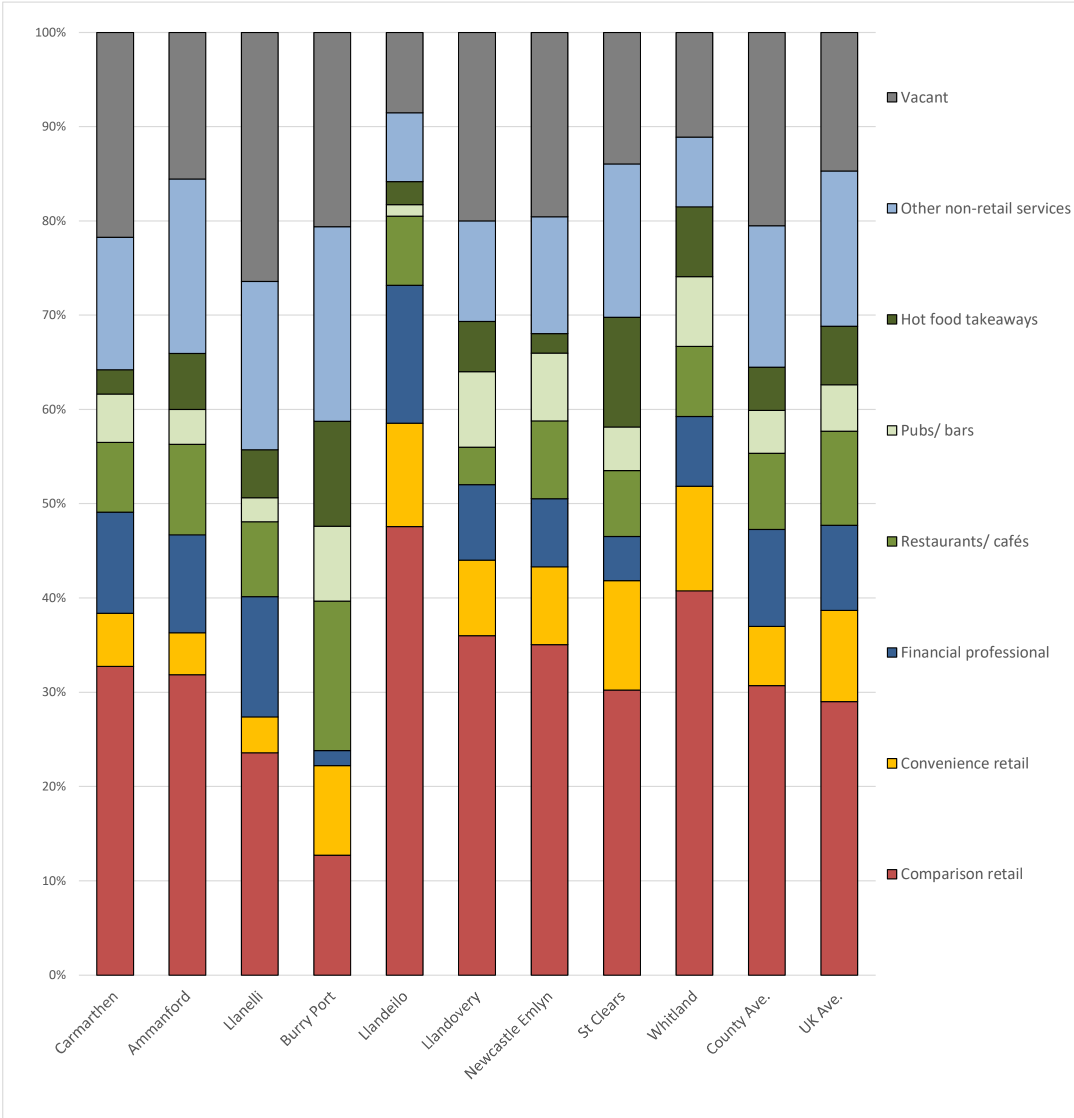
Source: Carmarthenshire Council's land use survey 2022.

3.12 This information confirms Carmarthen is the largest centre in terms of the total number of retail/service units. The two Mid Order Town Centre are smaller but vary significantly in terms of the total number of shop units. Llanelli has 314 units and Ammanford has only 135 units. The Lower Order Town Centres also vary significantly ranging from less than 30 retail/service units in Whitland to nearly 100 units in Newcastle Emlyn. A more detailed audit of the main town centres is set out later in this section.

Diversity of main town centre uses

3.13 Figure 3.1 overleaf shows the composition of the main town centres in terms of the mix and proportion of different Class A uses i.e. the proportion of shop units within each class. This is compared with the Carmarthenshire and UK averages.

Figure 3.1 Mix of retail and service uses (Class A and Sui Generis uses only)



Source: Carmarthenshire County Council Land Uses Survey (2022), Experian GOAD Plans UK Averages

3.14 Most of the main centres have a good mix of retail and non-retail service uses. All centres except Llanelli and Burry Port have a higher proportion of comparison goods retail units than the UK average. The smaller Lower Order Town Centres have a reasonably high proportion of convenience goods retail. The larger centres at Carmarthen, Ammanford and Llanelli have a relatively low proportion of convenience goods retail, but the figures exclude food stores in out of centre retail parks.

3.15 The three main centres at Carmarthen, Ammanford and Llanelli have a good provision of financial and professional services, but provision is limited in Burry Port and St Clears. All centres except Llandeilo and Whitland has a reasonable provision of other non-retail services. The food/beverage sector (Class A3) is reasonably well represented in all centres.

3.16 Shop vacancy rates are generally higher than the UK average (14.7%). The Carmarthenshire average is 20.5%. Llandeilo (8.5%), Whitland (11.1%) and St Clears (14%) are the only centres with a shop vacancy below the UK average. Vacancy rates are particularly high in Llanelli (26.4%).

Carmarthen town centre

3.17 Carmarthen town centre has 391 retail and service units and the mix of uses is set out in Table 3.3, which is compared with the Carmarthenshire and UK averages. A more detailed breakdown of non-retail services is shown in Table 3.4. The mix of uses in Carmarthen broadly reflects the Carmarthenshire average, but there are several differences. The centre has a slightly higher proportion of comparison retailers compared with the Carmarthenshire and UK averages despite the higher vacancy rate. There is a relatively low provision of convenience goods shops, restaurant/cafés and hot food takeaways.

Table 3.3 Mix of Shop and Service Uses - Carmarthen town centre

Type	Number units	% units	Carmarthenshire average %	UK average %
A1 comparison goods retail	128	32.7	30.7	29.0
A1 convenience goods retail	22	5.6	6.3	9.7
A1 non-retail services	41	10.5	10.5	14.7
A2 Financial/professional services	42	10.7	10.3	9.0
A3 Restaurants/cafés	29	7.4	8.1	10.0
A3 Pubs/bars	20	5.1	4.6	4.9
A3 Hot food takeaways	10	2.6	4.6	6.2
Sui generis non-retail services	14	3.6	4.5	1.8
Vacant	85	21.7	20.5	14.7
Total	**391**	**100.0**	**100.0**	**100.0**

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

Table 3.4 Mix of Service Uses - Carmarthen town centre

Type	Number units	% units	UK average
Restaurants/cafés	29	22.5	24.0
Fast food/takeaways	10	7.8	14.9
Pubs/bars	20	15.5	11.8
Banks/other financial services	22	17.1	8.4
Betting shops/casinos/amusement	3	2.3	3.8
Estate agents/valuers	6	4.7	7.8
Travel agents	3	2.3	1.5
Hairdressers/beauty parlours	35	27.1	26.3
Launderettes/dry cleaners	1	0.8	1.7
Sub-total	**129**	**100.0**	**100.0**
Other	27		
Total	**156**		

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.18 There were 85 vacant units within the centre at the time of the Council's 2022 land use Survey 2022, equating to a shop vacancy rate of 21.7%, which is higher than the County average and much higher than the UK average. The high vacancy rate suggests the supply of shop premises currently exceeds operator demand.

3.19 Carmarthen has a good range and choice of comparison goods shops (128), the highest of all the centres in Carmarthenshire. This provision is consistent with the centre's classification as a Sub-Regional – High Order Town Centre. There is a good mix of national multiples and small independent shops. Carmarthen has a good range and choice of non-retail services as shown in Table 3.4. There is a good provision of banks/other financial services and pubs/bars.

3.20 As part of the household survey, respondents were asked if they had used shops and services in Carmarthen in the last year. Nearly 70% of respondents in the study area had visited Carmarthen, which was the highest figure in the County. Of those who had used shops/services in Carmarthen, respondents were asked what they like and dislike about the town centre. The main factor liked in Carmarthen was 22.9% mentioning that it was close to home. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: good range of non-food shops (16%); nice/friendly atmosphere (13.6%); good range of independent shops (9.8%); easy to find car parking (8.2%); attractive/nice environment (7.9%); familiarity (7.5%), good cafés/restaurants (6.9%); compact layout (6.7%); traditional/historic character (6.3%) and good market (5.1%).
- *factors disliked*: too many empty shops (13.7%); needs more high street retailers (9.8%); need more/better non-food shops (9.2%); expensive car parking (5.4%); poor quality public toilets; needs more better quality shops (5.2%) and needs more clothes shops (5.1%).

3.21 Carmarthen generally had high levels of satisfaction and low levels of dissatisfaction.

Llanelli town centre

3.22 Llanelli town centre has 314 retail and service units as set out in Table 3.5. Llanelli has a low proportion of comparison retailers compared with the Carmarthenshire and UK averages and a high vacancy rate. There is a relatively low provision of convenience goods shops and pubs/bars.

3.23 There were 83 vacant units, a shop vacancy rate of 26.4%, which is the highest vacancy rate in the County. The high vacancy rate suggests the supply of shop premises significantly exceeds operator demand.

3.24 Llanelli, excluding the out of centre retail parks, has a reasonable range and choice of comparison goods shops (74), the second highest of all the centres in Carmarthenshire. There is a reasonable mix of national multiples and small independent shops, although the main focus of national multiples is within the out of centre retail parks. Nevertheless, provision in the town centre is consistent with the centre's classification as a Mid Order Town Centre.

Table 3.5 Mix of Shop and Service Uses - Llanelli town centre

Type	Number units	% units	Carmarthenshire average %	UK average %
A1 comparison goods retail	74	23.6	30.7	29.0
A1 convenience goods retail	12	3.8	6.3	9.7
A1 non-retail services	38	12.1	10.5	14.7
A2 Financial/professional services	40	12.7	10.3	9.0
A3 Restaurants/cafés	25	8.0	8.1	10.0
A3 Pubs/bars	8	2.5	4.6	4.9
A3 Hot food takeaways	16	5.1	4.6	6.2
Sui generis non-retail services	18	5.7	4.5	1.8
Vacant	83	26.4	20.5	14.7
Total	**314**	**100.0**	**100.0**	**100.0**

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.25 Llanelli has a good range and choice of non-retail services as shown in Table 3.6. There is a good provision of banks/other financial services, estate agents and hairdressers/beauty parlours.

Table 3.6 Mix of Service Uses - Llanelli town centre

Type	Number units	% units	UK average
Restaurants/cafés	25	22.3	24.0
Fast food/takeaways	16	14.3	14.9
Pubs/bars	8	7.1	11.8
Banks/other financial services	14	12.5	8.4
Betting shops/casinos/amusement	3	2.7	3.8
Estate agents/valuers	11	9.8	7.8
Travel agents	2	1.8	1.5
Hairdressers/beauty parlours	32	28.6	26.3
Launderettes/dry cleaners	1	0.9	1.7
Sub-total	**112**	**100.0**	**100.0**
Other	33		
Total	**145**		

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.26 Nearly 51% of respondents in the study area had visited Llanelli, which was the second highest figure in the County. Of those who had used shops/services in Llanelli, respondents were asked what they like and dislike about the town centre. The main factor liked in Llanelli was 29.4% mentioning that it was close to home. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: familiarity (6.4%); good range of non-food shops (6.2%) and easy to get to by car (5.5%).

- *factors disliked*: too many empty shops (32%); need more/better non-food shops (18%); lack of security/safety (16.5%); needs an update/revamp (10.1%); dirty street/poorly maintained (9.4%); needs more clothes shops (8.7%); too many charity shops (8.4%); poor/unfriendly atmosphere (5.8%); unattractive/poor environment (5.1%) and needs more independent shops (5.1%).

3.27 Llanelli had relatively low levels of satisfaction compared with other the nine main centres and the highest levels of dissatisfaction.

Ammanford town centre

3.28 Ammanford town centre has 135 retail and service units as set out in Table 3.7. Ammanford has a higher proportion of comparison retailers compared with the Carmarthenshire and UK averages, but there is a relatively low provision of convenience goods shops.

3.29 There were 21 vacant units, a vacancy rate of 15.6%, which is slightly above the UK average but below the Carmarthenshire average. The vacancy rate suggests the supply of shop premises slightly exceeds operator demand.

3.30 Ammanford has a more limited range and choice of comparison goods shops (43), when compared with Carmarthen and Llanelli, but a better provision than the smaller Lower Order Town Centres. There is a reasonable mix of national multiples and small independent shops. The scale and mix of facilities available is consistent with Ammanford's designation as a Mid Order Town Centre.

Table 3.7 Mix of Shop and Service Uses – Ammanford town centre

Type	Number units	% units	Carmarthenshire average %	UK average %
A1 comparison goods retail	43	31.9	30.7	29.0
A1 convenience goods retail	6	4.4	6.3	9.7
A1 non-retail services	19	14.1	10.5	14.7
A2 Financial/professional services	14	10.4	10.3	9.0
A3 Restaurants/cafés	13	9.6	8.1	10.0
A3 Pubs/bars	5	3.7	4.6	4.9
A3 Hot food takeaways	8	5.9	4.6	6.2
Sui generis non-retail services	6	4.4	4.5	1.8
Vacant	21	15.6	20.5	14.7
Total	**135**	**100.0**	**100.0**	**100.0**

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.31 Ammanford has a reasonable range and choice of non-retail services as shown in Table 3.8. There is a good provision of estate agents and hairdressers/beauty parlours.

Table 3.8 Mix of Service Uses - Ammanford town centre

Type	**Number units**	**% Units**	**UK average**
Restaurants/cafés	13	24.5	24.0
Fast food/takeaways	8	15.1	14.9
Pubs/bars	5	9.4	11.8
Banks/other financial services	3	5.7	8.4
Betting shops/casinos/amusement	1	1.9	3.8
Estate agents/valuers	6	11.3	7.8
Travel agents	1	1.9	1.5
Hairdressers/beauty parlours	16	30.2	26.3
Launderettes/dry cleaners	0	0.0	1.7
Sub-total	**53**	**100.0**	**100.0**
Other	12		
Total	**65**		

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.32 Only 22% of respondents in the study area had visited Ammanford, which was significantly below Carmarthen (70%) and Llanelli (51%) but comparable with Llandeilo. Of those who had used shops/services in Ammanford, respondents were asked what they like and dislike about the town centre. The main factor liked in Ammanford was 35% mentioning that it was close to home. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: good range of independent shops (5.5%) and you get everything one needs (5%).
- *factors disliked*: too many empty shops (22%); need more/better non-food shops (12.3%); needs more independent shops (8.3%); dirty street/poorly maintained (7.4%); needs an update/revamp (6.8%); needs more high street shops (6.6%) and expensive car parking (6.3%).

3.33 Ammanford had relatively low levels of satisfaction and relatively high levels of dissatisfaction when compared with the other centres in Carmarthenshire.

Burry Port town centre

3.34 Burry Port town centre has 63 retail and service units as set out in Table 3.9. Burry Port has a very low proportion of comparison retailers and a high proportion of food/beverage uses.

3.35 There were 13 vacant units within the centre, a shop vacancy rate of 20.6%, which is the third highest in Carmarthenshire and significantly above the UK average. The high vacancy rate suggests the supply of shop premises currently exceeds operator demand.

3.36 Burry Port has the lowest number of comparison goods shops (13) which are primarily small independent shops. Burry Port primarily caters for local day to day shopping and service needs, consistent with its designation as a Lower Order Town Centre.

Table 3.9 Mix of Shop and Service Uses – Burry Port town centre

Type	Number units	% units	Carmarthenshire average %	UK average %
A1 comparison goods retail	8	12.7	30.7	29.0
A1 convenience goods retail	6	9.5	6.3	9.7
A1 non-retail services	9	14.3	10.5	14.7
A2 Financial/professional services	1	1.6	10.3	9.0
A3 Restaurants/cafés	10	15.9	8.1	10.0
A3 Pubs/bars	5	7.9	4.6	4.9
A3 Hot food takeaways	7	11.1	4.6	6.2
Sui generis non-retail services	4	6.3	4.5	1.8
Vacant	13	20.6	20.5	14.7
Total	**63**	**100.0**	**100.0**	**100.0**

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.37 Burry Port has a limited range and choice of non-retail services as shown in Table 3.10, but the food/beverage sector and hairdressers/beauty parlours are well represented.

Table 3.10 Mix of Service Uses – Burry Port town centre

Type	Number units	% units	UK average
Restaurants/cafés	10	31.3	24.0
Fast food/takeaways	7	21.9	14.9
Pubs/bars	5	15.6	11.8
Banks/other financial services	0	0.0	8.4
Betting shops/casinos/amusement	0	0.0	3.8
Estate agents/valuers	0	0.0	7.8
Travel agents	0	0.0	1.5
Hairdressers/beauty parlours	9	28.1	26.3
Launderettes/dry cleaners	1	3.1	1.7
Sub-total	**32**	**100.0**	**100.0**
Other	4		
Total	36		

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.38 Only 12% of respondents in the study area had visited Burry Port, but this low figure is similar to other Lower Order Town Centres. Of those who had used shops/services in Burry Port, respondents were asked what they like and dislike about the town centre. The main factor liked in Burry Port was 36% mentioning that it was close to home and 5.6% saying it is close to family/friends. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: attractive environment (17.1%); nice/friendly atmosphere (12.8%); outdoor events (12.8%); good range of independent shops (9.5%); not too busy (7.9%); good cafés/restaurants (7.6%) and good range of other services (6.4%).

- *factors disliked*: need more/better non-food shops (8.5%).

3.39 Burry Port had relatively high levels of satisfaction and very low levels of dissatisfaction. Nearly 68% of respondents indicated there was nothing they dislike about the centre, the best figure recorded. These results suggest Burry Port has a loyal local customer base.

Llandeilo town centre

3.40 Llandeilo town centre has 82 retail and service units as set out in Table 3.11. Llandeilo has a high proportion of comparison goods shops, but a relatively low proportion of food/beverage uses and other non-retail services. Llandeilo has the highest number of comparison goods shops (39) when compared with other Lower Order Town Centres. Most of the comparison shops are small independent specialists. There is a good provision of clothing/fashion shops and gift/craft shops.

3.41 Llandeilo is the second largest Lower Order Town Centre in terms of the total number of retail and service uses, but is significantly smaller than Ammanford at the next tier in the hierarchy.

3.42 The vacancy rate (8.5%) is the lowest in Carmarthenshire and is well below the County and UK averages. The relatively low vacancy rate suggests the supply of shop premises is currently in-balance with operator demand.

Table 3.11 Mix of Shop and Service Uses – Llandeilo town centre

Type	Number units	% units	Carmarthenshire average %	UK average %
A1 comparison goods retail	39	47.6	30.7	29.0
A1 convenience goods retail	9	11.0	6.3	9.7
A1 non-retail services	6	7.3	10.5	14.7
A2 Financial/professional services	12	14.6	10.3	9.0
A3 Restaurants/cafés	6	7.3	8.1	10.0
A3 Pubs/bars	1	1.2	4.6	4.9
A3 Hot food takeaways	2	2.4	4.6	6.2
Sui generis non-retail services	0	0.0	4.5	1.8
Vacant	7	8.5	20.5	14.7
Total	**82**	**100.0**	**100.0**	**100.0**

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.43 Llandeilo has a limited range and choice of non-retail services as shown in Table 3.12, but the financial service sector is well represented

Table 3.12 Mix of Service Uses – Llandeilo town centre

Type	Number units	% units	UK average
Restaurants/cafés	6	33.3	24.0
Fast food/takeaways	2	11.1	14.9
Pubs/bars	1	5.6	11.8
Banks/other financial services	4	22.2	8.4
Betting shops/casinos/amusement	0	0.0	3.8
Estate agents/valuers	2	11.1	7.8
Travel agents	0	0.0	1.5
Hairdressers/beauty parlours	3	16.7	26.3
Launderettes/dry cleaners	0	0.0	1.7
Sub-total	**18**	**100.0**	**100.0**
Other	9		
Total	27		

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.44 Only 22% of respondents in the study area had visited Llandeilo, which was significantly below Carmarthen (70%) and Llanelli (51%) and comparable with Ammanford. Of those who had used shops/services in Llandeilo, respondents were asked what they like and dislike about the town centre. The main factor liked in Llandeilo was 51.3% mentioning the good range of independent shops. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: attractive environment (15.7%); traditional/historic character (12.8%); close to home (11.9%); good cafés/restaurants (11.8%); nice/friendly atmosphere (10.6%); parking easy to find (5.6%) and close to work (5.2%).
- *factors disliked*: traffic congestion (14.8%); not enough parking spaces (10.6%) and expensive parking (6.2%).

3.45 Llandeilo had relatively high levels of satisfaction and low levels of dissatisfaction relating to congestion and car parking.

Llandovery town centre

3.46 Llandovery town centre has 75 retail and service units as set out in Table 3.13. The centre has a relatively high proportion of comparison good shops. There were 15 vacant units a shop vacancy rate of 20%, which is slightly above the UK average but in line with the Carmarthenshire average. The relatively high vacancy rate suggests the supply of shop premises slightly exceeds operator demand.

3.47 The centre has a reasonable number of comparison goods shops (27) for a Lower Order Town Centres, but Llandovery has a limited range and choice of non-retail services as shown in Table 3.14. There is a good provision of pubs/bars.

Table 3.13 Mix of Shop and Service Uses – Llandovery town centre

Type	Number units	% units	Carmarthenshire average %	UK average %
A1 comparison goods retail	27	36.0	30.7	29.0
A1 convenience goods retail	6	8.0	6.3	9.7
A1 non-retail services	6	8.0	10.5	14.7
A2 Financial/professional services	6	8.0	10.3	9.0
A3 Restaurants/cafés	3	4.0	8.1	10.0
A3 Pubs/bars	6	8.0	4.6	4.9
A3 Hot food takeaways	4	5.3	4.6	6.2
Sui generis non-retail services	2	2.7	4.5	1.8
Vacant	15	20.0	20.5	14.7
Total	**75**	**100.0**	**100.0**	**100.0**

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

Table 3.14 Mix of Service Uses - Llandovery town centre

Type	Number units	% units	UK average
Restaurants/cafés	3	14.3	24.0
Fast food/takeaways	4	19.0	14.9
Pubs/bars	6	28.6	11.8
Banks/other financial services	2	9.5	8.4
Betting shops/casinos/amusement	0	0.0	3.8
Estate agents/valuers	1	4.8	7.8
Travel agents	0	0.0	1.5
Hairdressers/beauty parlours	4	19.0	26.3
Launderettes/dry cleaners	1	4.8	1.7
Sub-total	**21**	**100.0**	**100.0**
Other	6		
Total	**27**		

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.48 Only 9% of respondents in the study area had visited Llandovery, which is similar to other Lower Order Town Centres. Of those who had used shops/services in Llandovery, respondents were asked what they like and dislike about the town centre. The main factor liked in Llandovery was 27.7% mentioning the good range of independent shops. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: traditional/historic character (21.7%); close to home (16.5%); nice/friendly atmosphere (6.8%); attractive environment (6.3%); close to work (6.2%); good market (6.2%) and good cafés/restaurants (5.5%).
- *factors disliked*: need more/better non-food shops (14.5%);more/better food supermarkets (5.5%).

3.49 Llandovery has reasonably high levels of satisfaction and relatively low levels of dissatisfaction.

Newcastle Emlyn town centre

3.50 Newcastle Emlyn town centre has 97 retail and service units as set out in Table 3.15. The centre has a relatively high proportion of comparison goods shops and pubs/bars. Newcastle Emlyn has the second highest number of comparison goods shops (34) within the Lower Order Town Centres. These shops are primarily small independent outlets and charity shops.

3.51 Newcastle Emlyn is the largest Lower Order Town Centre in terms of the total number of retail and service uses but is significantly smaller than Ammanford at the next tier in the hierarchy.

Table 3.15 Mix of Shop and Service Uses – Newcastle Emlyn town centre

Type	Number units	% units	Carmarthenshire average %	UK average %
A1 comparison goods retail	34	35.1	30.7	29.0
A1 convenience goods retail	8	8.2	6.3	9.7
A1 non-retail services	5	5.2	10.5	14.7
A2 Financial/professional services	7	7.2	10.3	9.0
A3 Restaurants/cafés	8	8.2	8.1	10.0
A3 Pubs/bars	7	7.2	4.6	4.9
A3 Hot food takeaways	2	2.1	4.6	6.2
Sui generis non-retail services	7	7.2	4.5	1.8
Vacant	19	19.6	20.5	14.7
Total	**97**	**100.0**	**100.0**	**100.0**

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.52 There were 19 vacant units, a shop vacancy rate of 19.6, which is around the Carmarthenshire average but above the UK average. The relatively high vacancy rate suggests the supply of shop premises slightly exceeds operator demand.

3.53 Newcastle Emlyn has a limited range and choice of non-retail services as shown in Table 3.16, but the food/beverage sector is well represented.

Table 3.16 Mix of Service Uses – Newcastle Emlyn town centre

Type	Number units	% units	UK average
Restaurants/cafés	8	28.6	24.0
Fast food/takeaways	2	7.1	14.9
Pubs/bars	7	25.0	11.8
Banks/other financial services	3	10.7	8.4
Betting shops/casinos/amusement	0	0.0	3.8
Estate agents/valuers	2	7.1	7.8
Travel agents	0	0.0	1.5
Hairdressers/beauty parlours	5	17.9	26.3
Launderettes/dry cleaners	1	3.6	1.7
Sub-total	**28**	**100.0**	**100.0**
Other	8		
Total	**36**		

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages

3.54 Only 11% of respondents in the study area had visited Newcastle Emlyn, which is similar to other Lower Order Town Centres. Of those who had used shops/services in the centre, respondents were asked what they like and dislike about the town centre. The main factor liked in Newcastle Emlyn was 35.1% mentioning the good range of independent shops. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: close to home (26.2%); attractive environment (16.1%); traditional/ historic character (11.8%); not too busy (10.5%); nice/friendly atmosphere (8.7%) and close to work (5.4%).
- *factors disliked*: too many empty shops (13.9%); not enough parking spaces (8.6%); not enough banks/financial services (7.6%) and need more/better non-food shops (6.7%).

3.55 Newcastle Emlyn has mixed levels of satisfaction and dissatisfaction.

St Clears town centre

3.56 St Clears town centre has 43 retail and service units as set out in Table 3.17. It is the second smallest Lower Order Town Centre. The centre has a small provision of comparison goods shops (13). There were only 6 vacant units within the centre a shop vacancy rate (14%) around the UK average and lower than most centres in Carmarthenshire .

3.57 St Clears has a limited range and choice of non-retail services as shown in Table 3.18, but there is a good provision of hot food takeaways.

Table 3.17 Mix of Shop and Service Uses – St Clears town centre

Type	Number units	% units	Carmarthenshire average %	UK average %
A1 comparison goods retail	13	30.2	30.7	29.0
A1 convenience goods retail	5	11.6	6.3	9.7
A1 non-retail services	4	9.3	10.5	14.7
A2 Financial/professional services	2	4.7	10.3	9.0
A3 Restaurants/cafés	3	7.0	8.1	10.0
A3 Pubs/bars	2	4.7	4.6	4.9
A3 Hot food takeaways	5	11.6	4.6	6.2
Sui generis non-retail services	3	7.0	4.5	1.8
Vacant	6	14.0	20.5	14.7
Total	**43**	**100.0**	**100.0**	**100.0**

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

Table 3.18 Mix of Service Uses – St Clears town centre

Type	Number units	% units	UK average
Restaurants/cafés	3	21.4	24.0
Fast food/takeaways	5	35.7	14.9
Pubs/bars	2	14.3	11.8
Banks/other financial services	1	7.1	8.4
Betting shops/casinos/amusement	0	0.0	3.8
Estate agents/valuers	0	0.0	7.8
Travel agents	0	0.0	1.5
Hairdressers/beauty parlours	3	21.4	26.3
Launderettes/dry cleaners	0	0.0	1.7
Sub-total	**14**	**100.0**	**100.0**
Other	5		
Total	**19**		

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.58 Only 10% of respondents in the study area had visited St Clears, which is similar to other Lower Order Town Centres. Of those who had used shops/services in the centre, respondents were asked what they like and dislike about the town centre. The main factor liked in St Clears was 32.9% mentioning that it was close to home. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: good range of independent shops (13.8%); good restaurants/cafés (12.1%); good range of non-food shops (8.9%); good range of convenience shops (6.7%); attractive/nice environment (5.9%) and nice/friendly atmosphere (5.1%).
- *factors disliked*: need more/better non-food shops (4.8%).

3.59 St Clears had high levels of satisfaction and very low levels of dissatisfaction. Over 66% of respondents indicated there was nothing they dislike about the centre, the second best figure recorded.

Whitland town centre

3.60 Whitland town centre has 27 retail and service units as set out in Table 3.19. It is the smallest Lower Order Town Centre, with the lowest number of comparison good shops (11). However, the shop vacancy rate (11.1%) is the second lowest in Carmarthenshire, also below the UK average. The relatively low vacancy rate suggests the supply of shop premises is well balanced with operator demand.

Table 3.19 Mix of Shop and Service Uses – Whitland town centre

Type	Number units	% units	Carmarthenshire average %	UK average %
A1 comparison goods retail	11	40.7	30.7	29.0
A1 convenience goods retail	3	11.1	6.3	9.7
A1 non-retail services	1	3.7	10.5	14.7
A2 Financial/professional services	2	7.4	10.3	9.0
A3 Restaurants/cafés	2	7.4	8.1	10.0
A3 Pubs/bars	2	7.4	4.6	4.9
A3 Hot food takeaways	2	7.4	4.6	6.2
Sui generis non-retail services	1	3.7	4.5	1.8
Vacant	3	11.1	20.5	14.7
Total	**27**	**100.0**	**100.0**	**100.0**

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.61 Whitland has a very limited range and choice of non-retail services as shown in Table 3.20, but there is a good provision of hot food takeaways.

Table 3.3 Mix of Service Uses – Whitland town centre

Type	Number units	% units	UK average
Restaurants/cafés	2	25.0	24.0
Fast food/takeaways	2	25.0	14.9
Pubs/bars	2	25.0	11.8
Banks/other financial services	0	0.0	8.4
Betting shops/casinos/amusement	0	0.0	3.8
Estate agents/valuers	0	0.0	7.8
Travel agents	0	0.0	1.5
Hairdressers/beauty parlours	1	12.5	26.3
Launderettes/dry cleaners	1	12.5	1.7
Sub-total	**8**	**100.0**	**100.0**
Other	2		
Total	**10**		

Source: Carmarthen Council Land Use Survey 2022 and Experian Goad UK averages.

3.62 Only 7% of respondents in the study area had visited Whitland, which is the lowest figure for the Lower Order Town Centres. Of those who had used shops/services in Whitland, respondents were asked what they like and dislike about the town centre. The main factor liked in Whitland was 29.2% mentioning that it was close to home. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: good range of independent shops (9.4%); good range of convenience shops (8.2%); nice/friendly atmosphere (7.4%); close to work (7.2%); and parking easy to find (5%).
- *factors disliked*: need more/better non-food shops (17.1%); too many empty shops (15%); needs more/better clothes shops (6.5%); dirty street/poorly maintained (6.3%) and not enough banks/financial services (5%).

3.63 Whitland has mixed levels of satisfaction and dissatisfaction.

Summary

3.64 The analysis of the hierarchy of centres in this section indicates Carmarthenshire has a well-established network of centres that currently serve their respective areas. Carmarthen is the largest centre and the only centre with the potential to cater for a county-wide catchment area.

3.65 The average shop vacancy rate in Carmarthenshire town centre is 20.5%, which is significantly higher than the UK average (14.7%). Llanelli has the highest vacancy rate (26.4%), followed by Carmarthen (21.7%) and Burry Port (20.6%). Whitland has the lowest vacancy rate (11.1%), which is marginally below the UK average.

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

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

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

4.0 Retail and food/beverage need assessment

Introduction

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

4.2 This section sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage uses (Class A3 eating and drinking away from the home).

Assumptions and base data

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

Study area zones and population

4.4 A household telephone survey was undertaken to quantify existing shopping and leisure patterns in October 2022. The study area includes the administrative area of Carmarthenshire and parts of neighbouring authorities, i.e. where the primary catchment area of some main centres are expected to extend beyond the county boundary. The study area is sub-divided into six zones as shown in Appendix 1, based on ward boundaries, reflecting the primary catchment areas of the main destinations within the County.

4.5 The projected population within each zone between 2022 to 2037 is set out in Table 1 in Appendix 2, based on Experian projections. The base year 2022 population within the Study Area (zones 1 to 6) is 196,559. This population is projected to increase to 202,118 by 2037, an increase of 2.8%.

Retail Expenditure

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

4.7 Experian's short term EBS growth forecast rates during 2021, 2022 and 2023 reflect current economic circumstances, including the Covid-19 crisis. Experian's forecast changes during this three year period are as follows:

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

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

- convenience goods: +0.1% per annum growth for during 2024 and beyond;

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

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

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

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

4.11 Experian's projections suggest that these SFT percentages will increase to 6.8% and 27.2% by 2027 respectively. The long term Experian projections suggest an increase to 7.5% and 29.8% by 2037 respectively.

4.12 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2037, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT expenditure. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 3 and food/beverage expenditure is shown in Table 2 in Appendix 4.

4.13 The total convenience goods spending within the study area is forecast to increase marginally by +2.4% from £455.72 million in 2022 to £466.51 million in 2037, as shown in Table 3 in Appendix 2. This increase is due to population growth.

4.14 Comparison goods spending is forecast to increase by +44.8% between 2022 and 2037, increasing from £594.25 million in 2022 to £860.21 million in 2037, as shown in Table 3 in Appendix 3. This increase is primarily due to an increase in average expenditure per person.

4.15 Food and beverage spending is forecast to increase by +18.8% between 2022 and 2037, increasing from £239.6 million in 2022 to £284.38 million in 2037, as shown in Table 3 in Appendix 4. This increase is primarily due to an increase in average expenditure per person.

Growth in turnover densities

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

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

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

Base year market shares

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

4.20 The household survey results suggest a high level (nearly 90%) of expenditure retention within the study area for convenience goods shopping. The retention of comparison goods expenditure is lower but still significant (about 82% in the study area) due to the draw of larger centres outside the County, primarily in Swansea. The retention of food/beverage expenditure is lower (about 74%) with higher expenditure outflow to Swansea and other destinations.

4.21 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 3 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind. The survey results suggest reasonably high levels (over 90%) of convenience goods expenditure retention within the study area zones, as shown in Table 4.1. These figures indicate that most residents tend to undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips.

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

Zone	Main (1st)	Main (other)	Top-up	**Combined market share**
Zone 1 – Carmarthen	97.7	98.3	98.7	**98.1**
Zone 2 – Llanelli/Burry Port/Kidwelly	94.5	100.0	97.2	**96.4**
Zone 3 – Ammanford/Cross Hands	91.2	94.5	92.2	**92.2**
Zone 4 – Llandeilo/Llandovery	67.2	74.1	88.8	**75.1**
Zone 5 – Newcastle Emlyn	57.7	77.4	56.7	**61.3**
Zone 6 – St Clears/Whitland	77.3	63.4	80.9	**75.6**

Source: NEMS household survey results October 2022

4.22 The main food and grocery shopping destinations in Carmarthenshire were as follows (combined % market share of all expenditure within all study area zones):

1. Tesco Extra, Morfa Lane, Carmarthen 10.5%;
2. Asda, Murray Street, Llanelli 7.4%;
3. Tesco, Park Street, Ammanford 6.0%;
4. Tesco Extra, Trostre Retail Park, Llanelli 5.9%;
5. Morrisons, Pemberton Retail Park, Llanelli 5.3%
6. Aldi, Stephens Way Retail Park, Carmarthen 5.0%;
7. Lidl, Morfa Lane, Carmarthen 4.8%;
8. Morrisons, Parc Pensam Retail Park, Carmarthen 4.0%;

9 Aldi, Llandeilo Road, Llanelli 3.5%; and

10 M&S Foodhall, Red Street, Carmarthen 2.6%.

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

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

Goods category	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Clothing and footwear	72.1	83.8	72.6	78.1	85.5	83.2
Domestic electric appliances	94.0	90.7	82.5	86.6	88.9	79.2
Other electrical goods	94.1	89.6	85.1	86.2	91.6	76.0
Furniture, floor-coverings, household textiles	71.7	81.5	69.1	80.5	78.5	62.2
DIY / hardware and garden items	96.7	89.5	88.4	84.5	78.8	71.3
Health and beauty items	97.1	93.3	89.5	86.1	68.3	84.8
Books and stationery	98.3	92.6	85.0	89.5	75.2	84.5
Games, toys, sports, hobby items, pet products	94.7	77.5	78.9	78.5	80.8	74.2
Other non-food e.g. jewellery, glassware, household	73.1	70.5	65.0	79.5	86.4	70.1
Combined market share	**85.7**	**83.7**	**78.1**	**81.6**	**81.3**	**76.2**

Source: NEMS household survey results October 2022

4.24 The lowest levels of comparison goods expenditure retention (highest leakage or outflow) is from Zone 6 in the west of the County, where leakage to Haverfordwest is relatively high. Leakage to Swansea is relatively high in Zones 1 to 4, but lower in the west and north of the County perhaps due to the significant distances to competing centres. The results suggest good levels of expenditure retention for both higher and lower order comparison shopping.

4.25 The results of the household shopper survey relating to eating and drinking away from the home have been used to estimate existing food/beverage expenditure patterns. The market shares in Table 4 in Appendix 4 are a combined rate for both eating out and drinking at pubs/bars are based on an 80:20 split, based on Experian expenditure data. The survey results suggest high levels of food/beverage expenditure retention across the County, except for the Zone 5 in the north and Zone 6 to the west, as shown in Table 4.3.

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

Zone	Eating out	Drinking away from home	**Combined market share**
Zone 1 – Carmarthen	93.4	88.8	**92.5**
Zone 2 – Llanelli/Burry Port/Kidwelly	65.5	89.5	**70.3**
Zone 3 – Ammanford/Cross Hands	79.1	63.8	**76.0**
Zone 4 – Llandeilo/Llandovery	80.1	83.4	**80.7**
Zone 5 – Newcastle Emlyn	45.2	58.5	**47.8**
Zone 6 – St Clears/Whitland	55.5	55.5	**55.5**

Source: NEMS household survey results October 2022

Capacity for convenience goods retail floorspace

4.26 Based on the market shares calculated from the household survey results, available convenience goods expenditure attracted to destination in Carmarthenshire in 2022 is shown in Table 4 in Appendix 2. This has been projected forward to 2027, 2032 and 2037, and is summarised in Table 10A. Convenience goods expenditure available to facilities within Carmarthenshire is expected to increase from £462.58 million in 2022 to £473.72 million in 2037. This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT). A breakdown for the six zones is set out in Table 4.4.

Table 4.4 Convenience goods base year turnover in 2022

Zone	Turnover £M
Zone 1 – Carmarthen	144.59
Zone 2 – Llanelli/Burry Port/Kidwelly	186.58
Zone 3 – Ammanford/Cross Hands	98.37
Zone 4 – Llandeilo/Llandovery	18.75
Zone 5 – Newcastle Emlyn	5.98
Zone 6 – St Clears/Whitland	8.30
Total	**462.58**

Source: Table 10A in Appendix 2.

4.27 The benchmark turnover of the main food stores in Carmarthenshire is calculated in Table 9 in Appendix 2. The benchmark turnover is based on the net sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading i.e. above or below the company average.

4.28 The combined benchmark turnover of identified food stores is estimated to be £430.38 million, compared with the estimated actual turnover of £428.04 million, as estimated from the household survey results. These estimates suggest food store convenience goods sales floorspace in the County is trading just under the UK national average. Convenience goods shopping facilities within Carmarthenshire appear to be trading satisfactorily, but there are variations in different parts of the County e.g. a high level of under-trading in Llanelli.

4.29 Tables 10A and 10B in Appendix 2 subtract the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future. The figures indicate there is a projected convenience goods expenditure deficit of -£9.63 million at 2027, because population and expenditure growth will be offset by an increase in home shopping (SFT) and increases in sales densities.

4.30 This expenditure deficit is projected to decrease to -£5.76 million in 2032. Continued population growth reduces the deficit to -£1.01 million in 2037. These projections suggest there is, in overall terms, no capacity for additional convenience goods floorspace for the foreseeable future. However, there are locational variations across the County. The deficit and surplus expenditure projections for each study area zone/settlement are converted into floorspace estimates in Table 11 in Appendix 2, based on an average sales density of £12,000 per sq.m net, which is an approximate average for the main food store operators. The results are summarised in Table 4.5.

4.31 The deficit expenditure projections suggest an over-supply of convenience goods floorspace in the County of 1,124 sq.m gross in 2027 but decreasing to only 118 sq.m gross by 2037. However, there is a positive floorspace capacity projection in Zone 1 – Carmarthen and Zone 3 – Ammanford Cross Hands. There is a significant over-supply of floorspace in Zone 2, primarily in Llanelli.

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

Zone	2027	2032	2037
Zone 1 – Carmarthen	1,590	1,711	1,844
Zone 2 – Llanelli/Burry Port/Kidwelly	-3,394	-3,200	-2,950
Zone 3 – Ammanford/Cross Hands	789	896	1,036
Zone 4 – Llandeilo/Llandovery	33	51	70
Zone 5 – Newcastle Emlyn	-103	-100	-98
Zone 6 – St Clears/Whitland	-39	-28	-19
Total	**-1,124**	**-671**	**-118**

Source: Table 11 in Appendix 2.

4.32 Main shopping trips are generally made once a week or less often. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of bulk food shopping trip. Food store provision is shown in Table 9 in Appendix 2.

4.33 Collectively, town centres in Carmarthenshire have 77 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. There are 6 food superstores (over 2,500 sq.m net) in Carmarthenshire i.e. Tesco superstore in Carmarthen, Llanelli and Ammanford; Morrison's stores in Carmarthen and Llanelli and Asda in Llanelli. Most residents in the County have good or reasonable levels of access to at least two food superstores.

4.34 In addition to these superstores, there is good choice of other large stores/supermarkets and smaller convenience stores. There are 7 large food stores (800 to 1,100 sq.m net). The discount food sector is well represented by Lidl and Aldi stores in Carmarthen, Llanelli and Cross Hands. There is a Lidl store in Ammanford and a currently a planning application for an Aldi store.

4.35 There is a good selection of smaller convenience stores (under 800 sq.m net) including 13 Co-op stores and 3 Iceland stores.

4.36 Residents across the County have good access to a range and choice of food stores. The most obvious areas of deficiency in food store provision are the rural areas in the north, west and northeast (Zones 4, 5 and 6). However, population within these rural areas may be too low and dispersed to support larger food stores. The small settlements in these zones are probably too small to sustain a large food store.

Capacity for comparison goods floorspace

4.37 Available comparison goods expenditure has been projected to 2027, 2032 and 2037 and is summarised in Table 10 in Appendix 3. Comparison goods expenditure available to facilities in Carmarthenshire is expected to increase from £563.98 million in 2022 to £816.39 million by 2037. A breakdown for the six zones is set out in Table 4.6.

Table 4.6 Comparison goods base year turnover in 2022

Zone	Turnover £M
Zone 1 – Carmarthen	223.13
Zone 2 – Llanelli/Burry Port/Kidwelly	240.31
Zone 3 – Ammanford/Cross Hands	62.96
Zone 4 – Llandeilo/Llandovery	22.97
Zone 5 – Newcastle Emlyn	8.28
Zone 6 – St Clears/Whitland	6.34
Total	**563.98**

Source: Table 10 in Appendix 3.

4.38 Existing comparison goods retail floorspace provision in Carmarthenshire is shown in Table 9 in Appendix 3. In total there is over 158,000 sq.m gross with an estimated sales area of about 128,000 sq.m net. A significant proportion of this net sales floorspace is located at Carmarthen (31%) and Llanelli (38%). This provision includes over 45,000 sq.m net within out-of-centre retail parks.

4.39 The estimated turnover in 2022 (£563.98 million) and sales floorspace (127,917 sq.m net) suggest an average sales density of £4,409 per sq.m net, which is at the lower end of the range Lichfields would expect based on other recent experience. Comparison goods floorspace is, at best, trading satisfactorily in difficult market conditions.

4.40 Table 10 in Appendix 3 subtracts the projected turnover of existing floorspace including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be offset by expected growth in turnover densities up to and beyond 2032 i.e. existing retail businesses will absorb expenditure growth.

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

4.42 By 2027 there is a projected expenditure deficit of -£3.07 million, which will decrease to -£1.87 million by 2032. Longer term expenditure growth will create a small expenditure surplus of +£5.96 million in 2037. The deficit/surplus expenditure projections have been converted into floorspace estimates in Table 11 in Appendix 3 and summarised in Table 4.7 below. These projections suggest growth in turnover densities will absorb expenditure growth and there is likely to be an over-supply of comparison goods floorspace up to 2032.

Table 4.7 Comparison goods floorspace capacity (sq.m gross) - cumulative

Zone	2027	2032	2037
Zone 1 – Carmarthen	-327	-242	236
Zone 2 – Llanelli/Burry Port/Kidwelly	-289	-111	630
Zone 3 – Ammanford/Cross Hands	-61	-4	196
Zone 4 – Llandeilo/Llandovery	-43	-29	30
Zone 5 – Newcastle Emlyn	-5	-10	-3
Zone 6 – St Clears/Whitland	-9	1	16
Total	**-734**	**-395**	**1,106**

Source: Table 11, Appendix 3.

4.43 These projections suggest there is no capacity for additional comparison goods retail floorspace in Carmarthenshire for the foreseeable future. The implied over-supply of floorspace is 734 sq.m gross in 2027, which will reduce marginally to 395 sq.m gross by 2032. By 2037 there is a projected small under-supply of 1,106 sq.m gross.

4.44 Collectively main centres within Carmarthenshire have 377 comparison goods outlets including a mix of national retailers and small independent shops. There is extensive additional provision within the large retail parks in Carmarthen, Llanelli and Cross Hands. Nearly 85% of the comparison goods shopping floorspace is concentrated in Carmarthen, Llanelli and Cross Hands. The remaining provision is relatively dispersed and most other shopping destinations within the County provide a limited range and choice of comparison shops. However, Carmarthenshire is also served by Swansea and Haverfordwest.

4.45 The reasonably high comparison goods retention rates suggest there is limited the potential for Carmarthenshire to increase its market share of comparison goods expenditure and reduce expenditure leakage. The floorspace projections shown in Table 4.7 assume constant market shares in the future. Small increases in market shares could counter-balance the negative floorspace projections and the contraction of town centres is not considered necessary.

Capacity for food/beverage floorspace

4.46 Available food and beverage expenditure has been projected forward to 2027, 2032 and 2037, and is summarised in Table 10 in Appendix 4. The amount of expenditure attracted to facilities in Carmarthenshire is expected to increase from £197.02 million in 2022 to £234.1 million in 2037. A breakdown for the six zones is set out in Table 4.8.

Table 4.8 Food/beverage base year turnover in 2022

Zone	Turnover £M
Zone 1 – Carmarthen	73.42
Zone 2 – Llanelli/Burry Port/Kidwelly	65.78
Zone 3 – Ammanford/Cross Hands	28.71
Zone 4 – Llandeilo/Llandovery	20.72
Zone 5 – Newcastle Emlyn	3.72
Zone 6 – St Clears/Whitland	4.66
Total	**197.02**

Source: Table 10 in Appendix 4.

4.47 Existing food/beverage floorspace provision in Carmarthenshire is shown in Table 9 in Appendix 4. In total there is over 39,000 sq.m gross in the main destinations within the County.

4.48 The estimated turnover in 2022 (£197.02 million) and the existing floorspace (39,217 sq.m gross) suggest an average sales density of around £5,000 per sq.m gross, which is consistent with Lichfields' recent experience.

4.49 Table 10 in Appendix 4 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure potentially available for new development or the reoccupation of vacant units. The projections suggest an expenditure surplus of £8.15 million in 2027. Population and expenditure growth increases this expenditure surplus to £14.95 million at 2032 and £21.77 million by 2037. Floorspace capacity projections are shown in Tables 11 in Appendix 4 and summarised in Table 4.9 below.

Table 4.9 Food/beverage floorspace capacity (sq.m gross) - cumulative

Zone	2027	2032	2037
Zone 1 – Carmarthen	581	1,028	1,447
Zone 2 – Llanelli/Burry Port/Kidwelly	535	963	1,381
Zone 3 – Ammanford/Cross Hands	242	434	623
Zone 4 – Llandeilo/Llandovery	164	297	422
Zone 5 – Newcastle Emlyn	33	53	70
Zone 6 – St Clears/Whitland	37	70	98
Total	**1,591**	**2,845**	**4,041**

Source: Table 10A, Appendix 4.

4.50 The capacity projections suggest there is capacity for 1,591 sq.m gross in 2027, increasing to 2,845 sq.m gross by 2032 and 4,041 sq.m gross by 2037.

4.51 Collectively main centres within Carmarthenshire have 211 food/beverage outlets. These facilities are distributed throughout the designated centres, but the main concentrations are in Carmarthen town centre (59 outlets) and Llanelli (49 outlets). The other centres have a reasonable choice of food/beverage outlets, ranging from 6 outlets in Whitland to 26 outlets in Ammanford. There appears to be qualitative potential to improve evening economy related food/beverage uses, based on the analysis of centres in Section 3.

Retail and food/beverage summary

4.52 The quantitative floorspace capacity projections suggest retail expenditure and population growth up to 2032 will be offset by the growth in home shopping and increases in sales densities. As a result, there is no residual expenditure growth to support new retail floorspace. These projections assume Carmarthenshire will maintain its existing market share of expenditure in the study area.

4.53 In qualitative terms, Carmarthenshire has a good choice of large food superstores, supermarkets and smaller convenience stores. The most obvious areas of deficiency in food store provision are the rural areas in the north, west and northeast. However, the settlements in these areas are probably too small to sustain a large food store.

4.54 Collectively, Carmarthenshire has a mix of national retailers and independent shops that provide a good range and choice of comparison shops. However, most comparison goods shops are concentrated in Carmarthen, Llanelli and Cross Hands. Other shopping destinations provide a limited range and choice of comparison shops. The high level of existing expenditure retention suggests there is limited potential for Carmarthenshire to increase its market share of retail expenditure.

4.55 The provision of restaurants and bars serving the evening economy varies from centre to centre. The growth projections and qualitative analysis in Section 3, suggests there is potential to improve the evening and night-time economy related to food/beverage uses in centres across the County.

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

5.0 Leisure, entertainment and cultural uses

Introduction

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

Leisure and cultural expenditure

5.2 Experian local expenditure data for the Carmarthenshire study area, as shown in Appendix 1, indicates the resident population generates £35.27 million in 2022 (an average of about £179 person) on selected cultural, recreational and sporting services, broken down as follows:

- cinema admissions £3.75 million;
- live entertainment i.e. theatre/concerts/shows £9.50 million;
- museums, theme parks, houses and gardens £3.69 million;
- admissions to clubs, dances, discos, bingo £3.22 million;
- other miscellaneous entertainment £3.11 million;
- subscriptions to sports, social clubs and leisure £6.14 million; and
- leisure class fees £5.86 million.

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

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

Leisure activity	% Households participating	% Trips attracted to Carmarthenshire
Cinema	46.9	81.9
Theatre	29.0	35.6
Nightclubs/live music venues	10.9	24.5
Bingo	5.4	18.4
Gyms/health and fitness club	18.6	88.7
Tenpin bowling/ gaming	16.8	61.1
Trampoline park	7.0	2.7
Museums and art galleries	24.2	24.2

Source: NEMS household survey results October 2022

5.4 The participation and retention rates varies significantly for each activity. Only 13% of households do not participate in any of the eight leisure activities explored by the household survey. Many residents travel outside the study area e.g. to Cardiff, Swansea and London for some leisure activities, particularly trips to theatres, museums and art galleries. The retention rate is highest for trips to cinemas, health/fitness clubs and tenpin bowling.

5.5 Taking these leisure trip retention rates into account and the split of cultural/entertainment expenditure shown above, it is reasonable to assume Carmarthenshire currently retains about 60% of resident's total leisure expenditure within the study area. Based on this estimated 60% market share, leisure expenditure retained in 2022 is about £21.2 million.

5.6 The Council's 2022 land uses survey suggests commercial leisure, cultural and entertainment uses occupy about 11,800 sq.m gross. Based on an expenditure retention rate of 60% this suggests an average turnover density of about 1,800 per sq.m gross. This figure is likely to be higher if expenditure from tourism is included. Based on Lichfields' experience, leisure floorspace normally trades on average around £2,000 per sq.m gross.

5.7 Residents in Carmarthenshire have a relatively good range of commercial leisure and entertainment uses within the authority area and there is excellent provision within neighbouring authorities e.g. Swansea.

Leisure/cultural floorspace capacity

5.8 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by +5.5% between 2022 to 2027, or +10.5% between 2022 to 2032 and by +15.6% between 2022 to 2037.

5.9 With population growth (+1.1% by 2027, +2% by 2032 or +2.8% by 2037) total leisure expenditure should increase from £35.27 million in 2022 to £41.92 million by 2037. Retained leisure expenditure (60%) on all leisure/cultural activities should increase from about £21.2 million in 2022 to £22.6 million by 2027; £23.8 million by 2032 and then £25.0 million by 2037, an additional £1.4 million by 2027, £2.6 million by 2032 or £3.8 million by 2037.

5.10 If Carmarthenshire can increase expenditure retention from 60% to 70% then the level of additional expenditure available in 2027 would be +£5.1 million; +£6.5 million by 2030 and then +£8.1 million by 2037.

5.11 This additional expenditure could support about 2,500 sq.m gross of new commercial leisure and cultural floorspace by 2027, based on an assigned average of £2,000 per sq.m, increasing to 3,200 sq.m gross by 2032 and 4,000 sq.m gross by 2037.

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

Cinemas

5.13 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946. However the number of trips declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s. dropping to only 54 million trips in 1984. After 1984 the sector improved up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute).

5.14 Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate was about 2.6 trips per person per annum, before the Covid crisis. The number of trips during the Covid-19 crisis will have reduced significantly. This cinema assessment assumes trip levels will return to pre-Covid levels in the future (2.6 trips per person per annum).

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

5.16 Population in the Carmarthenshire study area is 196,559, which based on the UK national average above, would generate 511,000 cinema trips, which could support 13.4 cinema screens or 2,689 cinema seats. The household survey results suggest Carmarthenshire retains about 82% of cinema trips, which would generate capacity for 11 screens or 2,205 seats. This potential may be slightly higher if tourist visitors are included.

5.17 Experian's local expenditure data indicates the Carmarthenshire study area generates £3.75 million on cinema trips. This expenditure estimate appears to be consistent the 511,000 cinema trips estimated above, because it implies an average of £7.30 per person each trip. This estimate suggests the cinema visitation rate in the Carmarthenshire study area is around the national average (2.6 trips per annum per person).

5.18 Existing cinema provision in Carmarthenshire is 12 screens and 1,816 seats, as follows:

- Vue, Carmarthen(6 screens and 904 seats);
- Public Hall and Cinema, Cross Hands (1 screen and 300 seats); and
- Odeon, Llanelli (5 screen and 612 seats);

5.19 Population within the study area is projected to increase to 202,118 by 2037, generating 525,000 cinema trips in total, again based on the pre-Covid UK average visitation rate. If Carmarthenshire continues to attract 82% of these trips, then 430,000 cinema trips will be made to facilities in the County in 2037.

5.20 Adopting the UK average trips per cinema screen (38,000 trips per screen), implies that 430,000 cinema trips would generate demand for 11 cinema screens or 2,263 seats in 2037. These projections suggest limited potential for new cinema screens, but a potential under-supply of 447 seats in 2037, which could accommodate a small boutique cinema. However, the longer-term impact of the Covid-19 on the number of cinema trips may reduce this theoretical capacity.

Theatres, nightclubs, live music and other cultural activities

5.21 The household survey results indicate less than 30% of respondents in the study area visit theatres; about 11% visit nightclubs/live music venues and 24% visit museums/art galleries.

5.22 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (223) presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018 (pre-Covid). The average ticket revenue per venue is £5.7 million. The UK average attendance per performance is 545 and the average spend per trip is about £37.

5.23 The household survey results indicate the participation rate for theatres is relatively low (30%). The main destinations for households participating were Swansea Grand Theatre

(20%), Theatrau Sir Gar, Llanelli (18%), Donald Gordon Theatre Cardiff (18%), Lyric Theatre Carmarthen (11%), Central London (9%) and New Theatre Cardiff Castle (5%).

5.24 Carmarthenshire's market share of all theatre trips generated by the study area resident population is about 36%. Experian's local expenditure data indicates the study area generates £9.5 million on live theatre, concerts and shows, which is about 260,000 theatre trips based on the average spend per trip (£37).

5.25 Based on the average ticket revenue per venue (£5.7 million) the study area population generates theoretical demand for less than two venues. This estimate assumes venues capable of accommodating an average attendance of 545 per performance. The expenditure estimate (£9.5 million) excludes tourist expenditure. However, existing theatre provision in Carmarthenshire appears to be sufficient to meet demand, allowing for in and outflows of theatre trips.

5.26 Leisure expenditure is projected to increase by about 18.8% by 2037, which suggests the study area expenditure on live theatre, concerts and shows could increase to £11.3 million, and additional £1.8 million. These expenditure figures, low market share and the availability of theatres in Swansea and Cardiff suggest there is limited potential for an additional theatre in Carmarthenshire.

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

5.28 The household survey results indicate the participation rate for nightclub venues is relatively low (11%) and most residents in the study area visit nightclub venues in Cardiff (27%) and Swansea (26%). Carmarthenshire's market share of participating households in the study area is less than 25%. Trends in this sector, low participation rates and low trip retention suggest there is limited potential for growth in Carmarthenshire.

5.29 The household survey results indicate the participation rate for museums/art galleries is similar at 24.2%. Many destinations were mentioned by households participating in this activity. The main destinations for households participating were Carmarthenshire County Museum (17%), National Museum Cardiff (15%), Central London (14%) and Cardiff Castle (4%).

5.30 Experian's local expenditure data indicates the study area generates £3.69 million on museums, theme parks, houses and garden, which could increase to £4.38 million by 2037. Leisure expenditure growth retained in Carmarthenshire is likely to be relatively small. However, if Carmarthenshire can increase its market share, reducing the leakage of trips from the local area or increase the number of tourist visitors, then the potential for growth will be more significant.

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

Health and fitness clubs

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

5.33 The household survey results indicate about 19% of households visit health and fitness gyms. The survey results also suggest Carmarthenshire retains nearly 89% of gym trips in the study area equating to a catchment population of about 175,000 in 2022. The study area population is projected to increase by 2.8% by 2037. Carmarthenshire's catchment population for gyms would increase only marginally by about 4,900 people. The additional 4,900 people could support 39 additional fitness stations by 2037, based on the UK average of about 8 fitness per 1,000 people, which could support one medium sized facility. This potential is based on constant participation rates, but demand for additional facilities within Carmarthenshire could also arise from increased participation rates.

5.34 As indicated above, the study area population generates £6.14 million on subscriptions to sports and social clubs. With population growth this expenditure is projected to increase to £7.29 million by 2037. An 18.8% combined increase in population and participation could support about 260 fitness stations by 2037, which is 3 to 5 medium to large gym facilities.

Tenpin bowling and other indoor leisure innovations

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

5.36 The household survey results indicate about 17% of households visit tenpin bowling/gaming facilities. Carmarthenshire retains nearly 61% of tenpin bowling trips in the study area equating to a catchment population of about 120,000 in 2022 increasing to 123,000 in 2037. The main destinations for participating households were Xcel Bowl Carmarthen (56%) and Tenpin Swansea (30%). Based on the UK average of one lane per 12,000 people, the Carmarthenshire catchment population in 2037 can theoretically support 10 lanes. This potential is likely to be higher if tourist visitors are included.

5.37 Xcel Bowl in Carmarthen has 11 lanes and Tenpin in Swansea has 26 lanes. Collectively, these two existing facilities could theoretically serve a catchment population of 444,000 people. There appears to be limited potential for an additional tenpin bowling facility in Carmarthenshire.

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

5.39 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts.

These types of facilities have emerged in Wales including Swansea and Haverfordwest but not in Carmarthenshire.

5.40 The household survey results indicate only 7% of respondents in the study area currently visit trampoline centres. Trampoline destinations mentioned by households participating in this activity included Limitless Activity Centre, Swansea (53%) and Buzz Trampoline Park, Swansea (21%).

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

Bingo, games of chance and gambling

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

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

5.44 The household survey results suggest the bingo participation rate is 5.4% of households, which is consistent with the UK average participation rate of around 5%. However, Carmarthenshire's market share of bingo trips in the study area is relatively low at 18.4%. The adult population (about 158,000 in 2022) in the study area is theoretically capable of supporting 2.1 bingo facilities and 0.5 casinos, based on the UK averages. The main bingo destinations mentioned by households participating in this activity were:

- Castle Bingo, Swansea (29%);
- Mecca Bingo, Swansea (28%); and
- Argos Bingo, Llanelli (11%).

5.45 There is theoretical scope for an additional bingo facility in Carmarthenshire, but the presence of existing facilities in Swansea and dispersed population across the County may limit operator demand. The growth in on-line gambling is also likely to reduce demand for bingo halls.

Commercial leisure uses summary

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

5.47 In global terms future expenditure growth and increase retention could support about 2,500 sq.m gross of new commercial leisure and cultural floorspace in Carmarthenshire by 2027, increasing to 3,200 sq.m gross by 2032 and 4,000 sq.m gross by 2037. This additional floorspace could include:

1 3 to 5 additional medium/large health and fitness facilities (about 260 new fitness stations in total);
2 a small boutique cinema;
3 a bingo facility; and
4 a trampoline centre or other new leisure innovations e.g. indoor climbing, escape rooms, virtual sport activities.

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

6.0 Implications for planning policy

Accommodating growth and change

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

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

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

3 allocating suitable opportunities to meet development needed;

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

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

Floorspace capacity projections

6.3 The assessment of the potential for new retail, food/beverage floorspace within the previous sections suggests there is modest long-term scope for new retail development within Carmarthenshire. Tables 6.1, 6.2 and 6.3 below summarise the floorspace requirements in Carmarthenshire up to 2027, 2032 and 2037 (cumulative).

6.4 These projections assume Carmarthenshire can maintain its market share of expenditure in the future. This approach recognises that additional development within Carmarthenshire could help to increase the area's market share, but this increase will be counter-balanced by development within competing centres. Recognising the relatively high existing expenditure retention rates, a balanced and sustainable approach has been adopted.

6.5 Table 6.1 indicates there is a combined (retail and food/beverage) small over-supply of 266 sq.m gross of floorspace in 2027, due to negative retail floorspace projections exceeded the need for new food/beverage floorspace. By 2032 this combined over-supply reduces and becomes an under-supply of 1,776 sq.m gross, due to the need for additional food/beverage floorspace. In 2037 the under-supply increases to 5,029 sq.m gross, which is again primarily food/beverage floorspace. This longer term projection (5,029 sq.m gross) equates to a very modest increase in Carmarthenshire's existing floorspace at less than 2%.

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

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

Table 6.1 Retail and food/beverage floorspace requirements up to 2027 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
Zone 1 – Carmarthen	1,590	-327	581	**1,844**
Zone 2 – Llanelli/Burry Port/Kidwelly	-3,394	-289	535	**-3,148**
Zone 3 – Ammanford/Cross Hands	789	-61	242	**970**
Zone 4 – Llandeilo/Llandovery	33	-43	164	**154**
Zone 5 – Newcastle Emlyn	-103	-5	33	**-75**
Zone 6 – St Clears/Whitland	-39	-9	37	**-11**
Total	**-1,124**	**-734**	**1,591**	**-266**

Table 6.2 Retail and food/beverage floorspace requirements up to 2032 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
Zone 1 – Carmarthen	1,711	-242	1,028	**2,497**
Zone 2 – Llanelli/Burry Port/Kidwelly	-3,200	-111	963	**-2,348**
Zone 3 – Ammanford/Cross Hands	896	-4	434	**1,326**
Zone 4 – Llandeilo/Llandovery	51	-29	297	**319**
Zone 5 – Newcastle Emlyn	-100	-10	53	**-57**
Zone 6 – St Clears/Whitland	-28	1	70	**43**
Total	**-671**	**-395**	**2,845**	**1,779**

Table 6.3 Retail and food/beverage floorspace requirements up to 2037 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
Zone 1 – Carmarthen	1,844	236	1,447	**3,527**
Zone 2 – Llanelli/Burry Port/Kidwelly	-2,950	630	1,381	**-939**
Zone 3 – Ammanford/Cross Hands	1,036	196	623	**1,855**
Zone 4 – Llandeilo/Llandovery	70	30	422	**522**
Zone 5 – Newcastle Emlyn	-98	-3	70	**-31**
Zone 6 – St Clears/Whitland	-19	16	98	**95**
Total	**-118**	**1,106**	**4,041**	**5,029**

Source: Table 11 in Appendix 2, 3 and 4.

Vacant shop premises

6.8 Based on the most recent land use data there are 252 vacant shop units within Carmarthenshire's main town centres, an average vacancy rate of 20.5%, which is significantly higher than the UK average (14.7%). The shop vacancy rate is below the UK average in Llandeilo (8.5%), St Clears (14%) and Whitlands (11.1%). The total amount of vacant floorspace in the main town centres is about 38,600 sq.m gross.

6.9 It is reasonable to assume the number of vacant units could, as a minimum, reduce to the UK average of 14.7% in the future. This reduction in the shop vacancy rate could accommodate over 10,000 sq.m gross of new uses, which is theoretically capable of meeting all of the projected floorspace capacity projection up to 2037 (5,029 sq.m gross) and commercial leisure and cultural floorspace (4,000 sq.m gross).

6.10 The floorspace projections and high shop vacancy rates suggest there is no quantitative need to increase the combined amount of retail and food/beverage floorspace in Carmarthenshire up to 2037. However, there is likely to be a shift in retail space to food/beverage and leisure/cultural uses, with some vacant shop premises also converting to these uses. Not all vacant shop units will be suitable for conversion to leisure/cultural uses, therefore new development may be required to accommodate new uses. Leisure development proposals will need to be considered on a case by case basis, adopting the sequential and impact tests were necessary.

Zone 1 - Carmarthen

6.11 In Zone 1 the global floorspace projection is 3,527 sq.m gross in 2037. The shop vacancy rate in Carmarthen town centre is 21.7% (85 vacant units totalling 12,700 sq.m gross). If the vacancy rate fell to 14.7% (the UK average) then 28 units could be reoccupied and could accommodate about 4,200 sq.m gross, which is sufficient to accommodate the retail/food/beverage floorspace capacity projection in 2037 (3,527 sq.m gross)

6.12 The priority for Carmarthen should be the re-occupation of vacant floorspace in the town centre for a mix of retail, food/beverage and leisure/cultural uses. No contraction of the town centre boundary is necessary.

Zone 2 – Llanelli/Burry Port/Kidwelly

6.13 The Zone 2 global floorspace projection is -939 sq.m gross in 2037. However, this negative floorspace capacity figure relates to below average trading performance of food stores in Llanelli. The negative projection figure does not suggest a significant increase in shop vacancy levels in the town centres is likely to occur and no contraction of the town centre boundaries is necessary Excluding convenience goods retailing, the global floorspace capacity figure for comparison goods retail and food/beverage uses is 2,011 sq.m gross in 2037.

6.14 The shop vacancy rate in Llanelli town centre is 26.4% (83 vacant units totalling 16,700 sq.m gross). If the vacancy rate fell to 14.7% then 37 units could be reoccupied and could accommodate about 7,400 sq.m gross, which is more than sufficient to accommodate the comparison goods retail and food/beverage floorspace capacity projection in 2037 (2,011 sq.m gross).

6.15 The shop vacancy rate in Burry Port town centre is 20.6% (13 vacant units totalling 1,600 sq.m gross). If the vacancy rate fell to 14.7% then 4 units could be reoccupied and could accommodate about 500 sq.m gross.

6.16 The priority for Llanelli and Burry Port should be the re-occupation of vacant floorspace in the town centres for a mix of comparison goods retail, food/beverage and leisure/cultural uses.

Zone 3 – Ammanford/ Cross Hands

6.17 The Zone 3 global floorspace projection is 1,855 sq.m gross in 2037. Most of this projection (1,086 sq.m gross) relates to higher than average trading levels within food stores in Ammanford and Cross Hands. Current planning application proposals for a new Aldi store, B&M store and drive-thru restaurants in Ammanford exceed this floorspace capacity projection for Zone 3. If permitted and implemented these planning applications proposals will result in an over-supply of retail floorspace in Zone 3.

6.18 The shop vacancy rate in Ammanford town centre is 15.6% (21 vacant units totalling 1,900 sq.m gross). There are 14 vacant units in Cross Hands totalling 4,400 sq.m gross.

6.19 The priority for Ammanford town centre should be the re-occupation of vacant floorspace for a mix of retail, food/beverage and leisure/cultural uses.

Zone 4 – Llandeilo/Llandovery

6.20 The Zone 4 global floorspace projection is 522 sq.m gross in 2037. The shop vacancy rates in Llandeilo and Llandovery town centres is 8.5% and 20% respectively (22 vacant units totalling 2,700 sq.m gross). If the vacancy rate in Llandovery fell to 14.7% then 4 units could be reoccupied and could accommodate about 500 sq.m gross, which could be sufficient to accommodate the floorspace capacity projection in 2037.

6.21 The priority for Llandeilo and Llandovery should be the re-occupation of vacant floorspace in the town centres for a mix of retail, food/beverage and leisure/cultural uses.

Zone 5 – Newcastle Emlyn

6.22 The Zone 5 global floorspace projection is negative at -31 sq.m gross in 2037. The shop vacancy rate in Newcastle Emlyn town centre is 19.6% (19 vacant units totalling 2,000 sq.m gross). An increase in Newcastle Emlyn's market share of expenditure in Zone 5 may be required to significantly reduce the existing shop vacancy rate. The priority for Newcastle Emlyn should be consolidation and diversification with more food/beverage and non-retail uses.

Zone 6 – St Clears/Whitland

6.23 The Zone 6 the global floorspace projection is only 95 sq.m gross in 2037. The shop vacancy rates in St Clears and Whitland town centres is 14% and 11.1% respectively (9 vacant units totalling 800 sq.m gross). An increase in these town's market share of expenditure in Zone 6 may be required to significantly reduce the shop vacancy rates. The priority for St Clears and Whitland should be consolidation and diversification with more food/beverage and non-retail uses.

Hierarchy of centres

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

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

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

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

6.26 The analysis in Section 3 and shopping patterns established by the household survey results confirm Carmarthen town centre is the main centre in the County at the top of the hierarchy and should continue to be designated as a Sub-Regional – Higher Order Town Centre. Carmarthen town centre is the only centre that attracts a significant level of comparison goods retail trade from all six study area zones.

6.27 Llanelli is the next largest town centre, but its shopping role is less significant than Carmarthen in terms of the number of comparison goods outlets (74 compared with 128) and floorspace (15,700 sq.m gross compared with 30,321 sq.m gross). Llanelli town centre attracts most of its comparison goods retail trade from Zone 2 (Llanelli/Burry Port/ Kidwelly) and Zone 3 (Ammanford/Cross Hands).Limited trade is attracted from other parts of Carmarthenshire.

6.28 Ammanford town centre (114 occupied retail/service units) is smaller than Llanelli town centre (231 occupied units), but much larger than the other town centres in Carmarthenshire. It has a reasonable provision of comparison goods shopping (43 outlet and 11,528 sq.m gross) and large food stores not available in the small centres.

6.29 Llanelli and Ammanford should continue to be designated as Mid Order Town Centres.

6.30 The other town centres in Carmarthenshire are much smaller, ranging from 24 to 78 occupied retail and service outlets. Comparison goods retail provision within these centres is limited and primarily small independent shops. Convenience goods provision is primarily top-up rather than main food and grocery shopping. These centres have relatively local catchment areas.

6.31 Burry Port, Llandeilo, Llandovery, Newcastle Emlyn, St. Clears and Whitland should continue to be designated as Lower Order Town Centres.

Town centre boundaries and shopping frontages

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

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

6.34 PPW (4.3.31) states,

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

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

6.36 PPW (4.3.36) also states,

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

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

6.38 Taking the above into consideration the floorspace capacity projections and level of vacant floorspace the is no requirement to expand or contract town centre boundaries in Carmarthenshire.

6.39 The need to define separate primary and secondary frontages within town centre boundaries also need to be considered. The floorspace capacity projections suggest Class A1 retail uses should continue to be retained and focused within town centres, but some degree of diversification is required to accommodate growth in the food/beverage and leisure sectors and to help reduce the high level of shop vacancies in most centres.

Impacts and sequential tests

6.40 PPW explains that:

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

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

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

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

1 the quantum and nature of the use;

2 is the use acceptable in the town centre without having an unacceptable impact on existing operators and residents;

3 are there specific reasons why a use cannot locate in the town centre;

6.43 It will be up to the applicant to provide robust justification as to why proposed town centre uses cannot locate within the town centre.

6.44 A sequential approach should be followed to ensure that the benefits of the use can be realised within or as close as possible to the town centre. This policy is key to ensuring that town centres are integrated with day to day uses and this provides the opportunity to meet placemaking and sustainability policies set out in Future Wales and PPW.

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

7.0 Summary and Conclusions

7.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for Carmarthenshire. It explores how any identified growth could be accommodated and the future role of the main town centres.

Hierarchy of centres

7.2 The analysis of the hierarchy of centres indicates Carmarthenshire has a well-established network of centres that currently serve their respective areas. Carmarthen is the largest centre at the top of the hierarchy and should continue to be designated as a Sub-Regional – Higher Order Town Centre.

7.3 Llanelli is the next largest town centre, but its shopping role is less significant than Carmarthen in terms of the number of comparison goods outlets, floorspace and the extent of its catchment area. Ammanford town centre is smaller than Llanelli town centre but much larger than the other town centres, with a reasonable provision of comparison goods shopping and large food stores. Llanelli and Ammanford should continue to be designated as Mid Order Town Centres.

7.4 The other town centres in Carmarthenshire are much smaller and have local catchment areas. They have limited comparison goods retail provision and top-up rather than main food and grocery shopping provision. Burry Port, Llandeilo, Llandovery, Newcastle Emlyn, St. Clears and Whitland should continue to be designated as Lower Order Town Centres.

7.5 The average shop vacancy rate in the County is over 20%, which is much higher than the UK average (14.7%). Llandeilo (8.5%), Whitland (11.1%) and St Clears (14%) are the only centres with a shop vacancy below the UK average. Vacancy rates are particularly high in Llanelli (26.4%).

7.6 Most of the main centres have a good mix of retail and non-retail service uses. All centres except Llanelli and Burry Port have a higher proportion of comparison goods retail units than the UK average. The smaller Lower Order Town Centres have a reasonably high proportion of convenience goods retail. All centres except Llandeilo and Whitland has a reasonable provision of other non-retail services. The food/beverage sector (Class A3) is reasonably well represented in all centres.

7.7 The household survey results suggest a relatively high levels of expenditure retention within the study area for both convenience and comparison goods shopping and food/beverage (Class A3 uses). The retention of comparison goods expenditure is slightly lower due to the draw of larger centres, primarily in Swansea and Haverfordwest. However, the results suggest good levels of expenditure retention for both higher and lower order comparison goods.

7.8 The high level of existing expenditure retention suggests there is limited potential for Carmarthenshire to increase its market share of retail expenditure. There is more potential to increase the market share of leisure trips.

Convenience goods retail

7.9 The projection indicate there will be a convenience goods expenditure deficit of -£9.63 million at 2027, because population and expenditure growth will be offset by an increase in home shopping (SFT) and increases in sales densities.

7.10 This expenditure deficit is projected to decrease to -£5.76 million at 2032 and continued population growth reduces the deficit to -£1.01 million at 2037. These projections suggest there in overall terms there is no capacity for additional convenience goods floorspace for the foreseeable future. However, there are locational variations across Carmarthenshire.

7.11 The deficit expenditure projections suggest an over-supply of convenience goods floorspace in Carmarthenshire of 1,1,24 sq.m gross in 2027, but decreasing to only 118 sq.m gross by 2037. However, there is a positive capacity projection in Zone 1 – Carmarthen (1,844 sq.m gross) and Zone 3 – Ammanford/Cross Hands (1,036 sq.m gross).

7.12 Collectively, the main town centres in Carmarthenshire have 77 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. Residents in most parts of the County have good access to a range and choice of food stores. The most obvious areas of deficiency in food store provision is the rural areas in the north. West and northeast (Zone 4,5 and 6). However, the settlements in these areas are probably too small to sustain a large food store.

Comparison goods retail

7.13 The projections an expenditure deficit of -£3.07 million in 2027, which will increase to -£1.87 million by 2032. Longer term expenditure growth will create a small surplus of +£5.96 million in 2037. These projections suggest growth in turnover densities will absorb expenditure growth and there is likely to be an over-supply of comparison goods retail floorspace up to and beyond 2032.

7.14 These projections suggest there is no capacity for additional comparison goods retail floorspace in Carmarthenshire for the foreseeable future. The implied over-supply of floorspace is 734 sq.m gross in 2027, which will reduce marginally to 395 sq.m gross by 2037.

7.15 Collectively main town centres in Carmarthenshire have 377comparison goods outlets including national multiple retailers, but mostly small independent shops in the smaller centres. There is extensive additional provision at large retail parks in Carmarthen, Llanelli and Cross Hands. Nearly 85% of the comparison goods floorspace is concentrated in Carmarthen, Llanelli and Cross Hands. The remaining provision is relatively dispersed and most shopping destinations provide a limited range and choice of comparison shops. Parts of Carmarthenshire are also served by Swansea and Haverfordwest. These larger centres and relatively high expenditure retentions rates will limit the potential for Carmarthenshire to increase its market share of comparison goods expenditure and reduce expenditure leakage.

Food and Beverage

7.16 There is a projected expenditure surplus of £8.15 million in 2027. Population and expenditure growth increases this expenditure surplus to £14.95 million at 2032 and £21.77 million by 2037. These figures suggest capacity for 1,591 sq.m gross in 2027, increasing to 2,845 sq.m gross by 2032 or 4,041 sq.m gross in 2037.

7.17 Food/beverage outlets total 211 units in the main town centres. These facilities are distributed throughout the designated centres, but the main concentrations are in Carmarthen town centre (59 outlets) and Llanelli (49 outlets). The other centres have a reasonable choice of food/beverage outlets (6 to 26 outlets), but the growth projections suggests there is potential to improve evening economy related food/beverage uses.

Commercial leisure and other town centre uses

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

7.19 In global terms future expenditure growth and increase retention could support about 4,000 sq.m of new commercial leisure and cultural floorspace in Carmarthenshire by 2037. This additional floorspace could include:

1. 3 to 5 additional medium/large health and fitness facilities (about 260 new fitness stations);
2. a small boutique cinema;
3. a bingo facility, perhaps in Carmarthen; and.
4. a trampoline centre or other new leisure innovations e.g. indoor climbing, escape rooms, virtual sport activities.

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

Accommodating Growth

7.21 Based on latest land use data there are 252 vacant shop units within Carmarthenshire's main centres, an average vacancy rate of 20.5%, which is significantly above the UK (14.7%). The total amount of vacant floorspace in the main centres is about 38,600 sq.m gross. It is reasonable to assume the number of vacant units could reduce in line with the UK average, i.e. to a lower vacancy rate of 14.7%. This reduction in the shop vacancy rate could accommodate over 10,000 sq.m gross of new uses, which could meet most of the projected floorspace capacity figures. However, there is likely to be a shift in retail space to food/beverage and leisure/cultural uses, with some vacant shop premises also converting to these uses. Not all vacant shop units will be suitable for conversion to leisure/cultural uses, therefore new development may be required to accommodate new uses.

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

Future Monitoring

7.23 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development management decisions. The study provides a broad overview of the potential need for further retail, food/beverage and leisure development in the short, medium and longer term forecast up to 2037. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections should be treated with caution.

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

1 population projections;

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

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

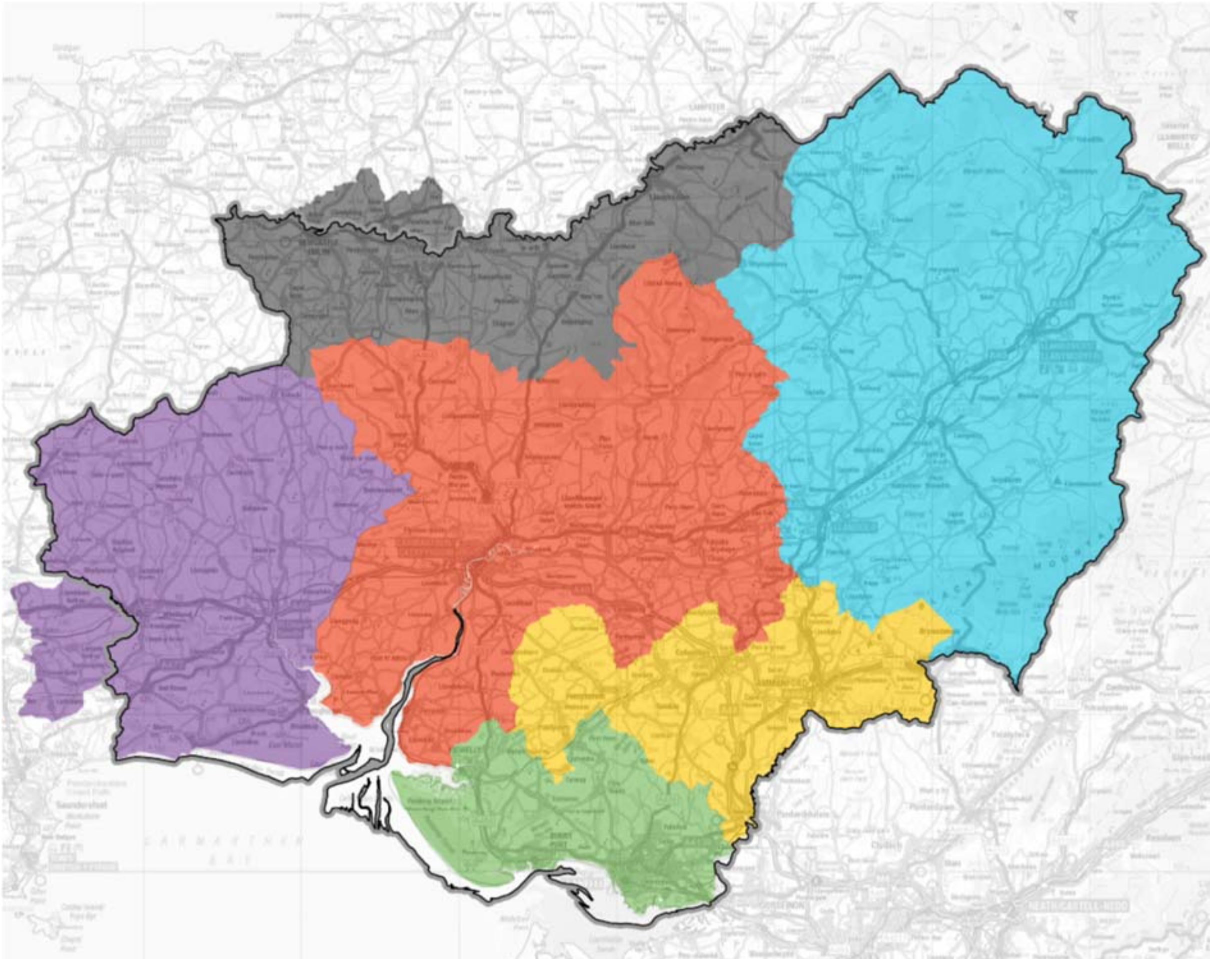
4 the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);

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

6 implemented development within and around the study area.

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

Appendix 1 : Study area



Key

Carmarthenshire Local Authority Boundary

Zones

Zone 1

Zone 2

Zone 3

Zone 4

Zone 5

Zone 6

Appendix 2 : Convenience assessment

Table 1 - Study area population projections

	2022	2027	2032	2037
Zone 1 - Carmarthen	34,801	35,117	35,331	35,522
Zone 2 - Llanelli/ Burry Port/ Kidwelly	70,112	70,905	71,539	72,217
Zone 3 - Ammanford/ Cross Hands	47,588	48,215	48,697	49,220
Zone 4 - Llandeilo/ Llandovery	16,351	16,495	16,637	16,764
Zone 5 - Newcastle Emlyn	13,269	13,454	13,504	13,517
Zone 6 - St. Clears/ Whitland	14,438	14,589	14,768	14,878
Total	**196,559**	**198,775**	**200,476**	**202,118**

Sources: *Experian MMG 3 population projections*

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

	2022	2027	2032	2037
Zone 1 - Carmarthen	2,430	2,414	2,416	2,420
Zone 2 - Llanelli/ Burry Port/ Kidwelly	2,207	2,192	2,194	2,198
Zone 3 - Ammanford/ Cross Hands	2,233	2,218	2,219	2,223
Zone 4 - Llandeilo/ Llandovery	2,515	2,498	2,500	2,504
Zone 5 - Newcastle Emlyn	2,532	2,515	2,517	2,521
Zone 6 - St. Clears/ Whitland	2,454	2,437	2,439	2,443

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

Table 3 - Total convenience goods expenditure (£m)

	2022	2027	2032	2037
Zone 1 - Carmarthen	84.57	84.77	85.36	85.96
Zone 2 - Llanelli/ Burry Port/ Kidwelly	154.74	155.42	156.96	158.73
Zone 3 - Ammanford/ Cross Hands	106.26	106.94	108.06	109.42
Zone 4 - Llandeilo/ Llandovery	41.12	41.20	41.59	41.98
Zone 5 - Newcastle Emlyn	33.60	33.84	33.99	34.08
Zone 6 - St. Clears/ Whitland	35.43	35.55	36.02	36.35
Total	**455.72**	**457.73**	**461.98**	**466.51**

Source: Tables 1 and 2

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

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow
Zone 1 - Carmarthen main stores	84.8%	4.0%	12.9%	15.2%	42.0%	51.2%	5.0%
Zone 1 - Carmarthen other	6.2%	0.1%	0.6%	0.2%	0.0%	3.2%	5.0%
Zone 2 - Llanelli main stores	2.8%	76.1%	12.2%	0.2%	0.0%	0.0%	20.0%
Zone 2 - Llanelli other	0.0%	3.8%	0.3%	0.0%	0.0%	0.0%	10.0%
Zone 2 - Burry Port main stores	0.0%	3.7%	0.0%	0.0%	0.0%	0.0%	5.0%
Zone 2 - Burry Port other	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	5.0%
Zone 2 - Kidwelly main stores	0.7%	2.7%	0.2%	0.0%	0.0%	0.9%	5.0%
Zone 2 - Kidwelly other	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	5.0%
Zone 3 - Ammanford main stores	0.0%	1.6%	38.9%	12.8%	0.0%	0.0%	15.0%
Zone 3 - Ammanford other	0.0%	0.7%	3.1%	0.2%	0.2%	0.0%	5.0%
Zone 3 - Cross Hands main stores	2.0%	2.7%	20.2%	7.1%	0.0%	0.0%	5.0%
Zone 3 - Other	0.0%	0.0%	3.4%	0.0%	0.4%	0.2%	5.0%
Zone 4 - Llandeilo main stores	1.0%	0.0%	0.2%	13.5%	1.7%	0.0%	5.0%
Zone 4 - Llandeilo other	0.0%	0.0%	0.1%	3.2%	0.0%	0.0%	5.0%
Zone 4 - Llandovery main stores	0.0%	0.0%	0.1%	15.5%	0.0%	0.0%	5.0%
Zone 4 - Llandovery other	0.0%	0.0%	0.0%	4.4%	1.4%	0.0%	5.0%
Zone 4 - Other	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	5.0%
Zone 5 - Newcastle Emlyn main stores	0.6%	0.0%	0.0%	0.0%	10.6%	0.0%	5.0%
Zone 5 - Newcastle Emlyn other	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	5.0%
Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	3.9%	0.0%	5.0%
Zone 6 - St. Clears main stores	0.0%	0.0%	0.0%	0.0%	0.0%	6.4%	5.0%
Zone 6 - St. Clears other	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	5.0%
Zone 6 - Whitland main stores	0.0%	0.0%	0.0%	1.7%	0.0%	4.4%	5.0%
Zone 6 - Whitland other	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	5.0%
Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.2%	3.7%	5.0%
Carmarthenshire sub-total	**98.1%**	**96.4%**	**92.2%**	**75.1%**	**61.3%**	**75.6%**	
Brecon	0.0%	0.0%	0.0%	2.6%	0.8%	0.0%	
Cardigan	0.0%	0.0%	0.0%	0.0%	16.4%	2.2%	
Haverfordwest	0.0%	0.2%	0.0%	0.0%	0.0%	14.6%	
Lampeter	0.0%	0.0%	0.0%	3.4%	9.8%	0.0%	
Swansea	1.9%	3.4%	7.2%	18.7%	1.0%	1.1%	
Other	0.0%	0.0%	0.6%	0.2%	10.7%	6.5%	
Other sub-total	**1.9%**	**3.6%**	**7.8%**	**24.9%**	**38.7%**	**24.4%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

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

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

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2022	**84.57**	**154.74**	**106.26**	**41.12**	**33.60**	**35.43**		**455.72**
Zone 1 - Carmarthen main stores	71.71	6.19	13.71	6.25	14.11	18.14	6.85	136.96
Zone 1 - Carmarthen other	5.24	0.15	0.64	0.08	0.00	1.13	0.38	7.63
Zone 2 - Llanelli main stores	2.37	117.75	12.96	0.08	0.00	0.00	33.29	166.46
Zone 2 - Llanelli other	0.00	5.88	0.32	0.00	0.00	0.00	0.69	6.89
Zone 2 - Burry Port main stores	0.00	5.73	0.00	0.00	0.00	0.00	0.30	6.03
Zone 2 - Burry Port other	0.00	0.62	0.00	0.00	0.00	0.00	0.03	0.65
Zone 2 - Kidwelly main stores	0.59	4.18	0.21	0.00	0.00	0.32	0.28	5.58
Zone 2 - Kidwelly other	0.00	0.93	0.00	0.00	0.00	0.00	0.05	0.98
Zone 3 - Ammanford main stores	0.00	2.48	41.34	5.26	0.00	0.00	8.66	57.74
Zone 3 - Ammanford other	0.00	1.08	3.29	0.08	0.07	0.00	0.24	4.77
Zone 3 - Cross Hands main stores	1.69	4.18	21.47	2.92	0.00	0.00	1.59	31.85
Zone 3 - Other	0.00	0.00	3.61	0.00	0.13	0.07	0.20	4.02
Zone 4 - Llandeilo main stores	0.85	0.00	0.21	5.55	0.57	0.00	0.38	7.56
Zone 4 - Llandeilo other	0.00	0.00	0.11	1.32	0.00	0.00	0.07	1.50
Zone 4 - Llandovery main stores	0.00	0.00	0.11	6.37	0.00	0.00	0.34	6.82
Zone 4 - Llandovery other	0.00	0.00	0.00	1.81	0.47	0.00	0.12	2.40
Zone 4 - Other	0.00	0.00	0.00	0.45	0.00	0.00	0.02	0.48
Zone 5 - Newcastle Emlyn main stores	0.51	0.00	0.00	0.00	3.56	0.00	0.21	4.28
Zone 5 - Newcastle Emlyn other	0.00	0.00	0.00	0.00	0.30	0.00	0.02	0.32
Zone 5 - Other	0.00	0.00	0.00	0.00	1.31	0.00	0.07	1.38
Zone 6 - St. Clears main stores	0.00	0.00	0.00	0.00	0.00	2.27	0.12	2.39
Zone 6 - St. Clears other	0.00	0.00	0.00	0.00	0.00	1.03	0.05	1.08
Zone 6 - Whitland main stores	0.00	0.00	0.00	0.70	0.00	1.56	0.12	2.38
Zone 6 - Whitland other	0.00	0.00	0.00	0.00	0.00	0.96	0.05	1.01
Zone 6 - Other	0.00	0.00	0.00	0.00	0.07	1.31	0.07	1.45
Carmarthenshire sub-total	**82.96**	**149.17**	**97.98**	**30.88**	**20.60**	**26.79**	**54.22**	**462.58**
Brecon	0.00	0.00	0.00	1.07	0.27	0.00		1.34
Cardigan	0.00	0.00	0.00	0.00	5.51	0.78		6.29
Haverfordwest	0.00	0.31	0.00	0.00	0.00	5.17		5.48
Lampeter	0.00	0.00	0.00	1.40	3.29	0.00		4.69
Swansea	1.61	5.26	7.69	7.69	0.34	0.39		22.98
Other	0.00	0.00	0.64	0.08	3.59	2.30		6.62
Other sub-total	**1.61**	**5.57**	**8.33**	**10.24**	**13.00**	**8.65**		**47.39**
TOTAL	**84.57**	**154.74**	**106.30**	**41.12**	**33.60**	**35.43**		**509.98**

Source: Tables 3 and 4

Table 6 - Future 2027 convenience goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2027	**84.77**	**155.42**	**106.94**	**41.20**	**33.84**	**35.55**		**457.73**
Zone 1 - Carmarthen main stores	71.89	6.22	13.80	6.26	14.21	18.20	6.87	137.45
Zone 1 - Carmarthen other	5.26	0.16	0.64	0.08	0.00	1.14	0.38	7.66
Zone 2 - Llanelli main stores	2.37	118.28	13.05	0.08	0.00	0.00	33.45	167.23
Zone 2 - Llanelli other	0.00	5.91	0.32	0.00	0.00	0.00	0.69	6.92
Zone 2 - Burry Port main stores	0.00	5.75	0.00	0.00	0.00	0.00	0.30	6.05
Zone 2 - Burry Port other	0.00	0.62	0.00	0.00	0.00	0.00	0.03	0.65
Zone 2 - Kidwelly main stores	0.59	4.20	0.21	0.00	0.00	0.32	0.28	5.60
Zone 2 - Kidwelly other	0.00	0.93	0.00	0.00	0.00	0.00	0.05	0.98
Zone 3 - Ammanford main stores	0.00	2.49	41.60	5.27	0.00	0.00	8.71	58.07
Zone 3 - Ammanford other	0.00	1.09	3.32	0.08	0.07	0.00	0.24	4.79
Zone 3 - Cross Hands main stores	1.70	4.20	21.60	2.93	0.00	0.00	1.60	32.02
Zone 3 - Other	0.00	0.00	3.64	0.00	0.14	0.07	0.20	4.04
Zone 4 - Llandeilo main stores	0.85	0.00	0.21	5.56	0.58	0.00	0.38	7.58
Zone 4 - Llandeilo other	0.00	0.00	0.11	1.32	0.00	0.00	0.08	1.50
Zone 4 - Llandovery main stores	0.00	0.00	0.11	6.39	0.00	0.00	0.34	6.84
Zone 4 - Llandovery other	0.00	0.00	0.00	1.81	0.47	0.00	0.12	2.41
Zone 4 - Other	0.00	0.00	0.00	0.45	0.00	0.00	0.02	0.48
Zone 5 - Newcastle Emlyn main stores	0.51	0.00	0.00	0.00	3.59	0.00	0.22	4.31
Zone 5 - Newcastle Emlyn other	0.00	0.00	0.00	0.00	0.30	0.00	0.02	0.32
Zone 5 - Other	0.00	0.00	0.00	0.00	1.32	0.00	0.07	1.39
Zone 6 - St. Clears main stores	0.00	0.00	0.00	0.00	0.00	2.28	0.12	2.40
Zone 6 - St. Clears other	0.00	0.00	0.00	0.00	0.00	1.03	0.05	1.09
Zone 6 - Whitland main stores	0.00	0.00	0.00	0.70	0.00	1.56	0.12	2.38
Zone 6 - Whitland other	0.00	0.00	0.00	0.00	0.00	0.96	0.05	1.01
Zone 6 - Other	0.00	0.00	0.00	0.00	0.07	1.32	0.07	1.46
Carmarthenshire sub-total	**83.16**	**149.83**	**98.60**	**30.94**	**20.74**	**26.88**	**54.47**	**464.62**
Brecon	0.00	0.00	0.00	1.07	0.27	0.00		1.34
Cardigan	0.00	0.00	0.00	0.00	5.55	0.78		6.33
Haverfordwest	0.00	0.31	0.00	0.00	0.00	5.19		5.50
Lampeter	0.00	0.00	0.00	1.40	3.32	0.00		4.72
Swansea	1.61	5.28	7.74	7.71	0.34	0.39		23.07
Other	0.00	0.00	0.64	0.08	3.62	2.31		6.66
Other sub-total	**1.61**	**5.60**	**8.38**	**10.26**	**13.09**	**8.68**		**47.62**
TOTAL	**84.77**	**155.42**	**106.98**	**41.20**	**33.84**	**35.55**		**512.24**

Source: Tables 3 and 4

Table 7 - Future 2032 convenience goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2032	**85.36**	**156.96**	**108.06**	**41.59**	**33.99**	**36.02**		**461.98**
Zone 1 - Carmarthen main stores	72.39	6.28	13.94	6.32	14.28	18.44	6.93	138.57
Zone 1 - Carmarthen other	5.29	0.16	0.65	0.08	0.00	1.15	0.39	7.72
Zone 2 - Llanelli main stores	2.39	119.44	13.18	0.08	0.00	0.00	33.78	168.88
Zone 2 - Llanelli other	0.00	5.96	0.32	0.00	0.00	0.00	0.70	6.99
Zone 2 - Burry Port main stores	0.00	5.81	0.00	0.00	0.00	0.00	0.31	6.11
Zone 2 - Burry Port other	0.00	0.63	0.00	0.00	0.00	0.00	0.03	0.66
Zone 2 - Kidwelly main stores	0.60	4.24	0.22	0.00	0.00	0.32	0.28	5.66
Zone 2 - Kidwelly other	0.00	0.94	0.00	0.00	0.00	0.00	0.05	0.99
Zone 3 - Ammanford main stores	0.00	2.51	42.03	5.32	0.00	0.00	8.80	58.67
Zone 3 - Ammanford other	0.00	1.10	3.35	0.08	0.07	0.00	0.24	4.84
Zone 3 - Cross Hands main stores	1.71	4.24	21.83	2.95	0.00	0.00	1.62	32.34
Zone 3 - Other	0.00	0.00	3.67	0.00	0.14	0.07	0.20	4.09
Zone 4 - Llandeilo main stores	0.85	0.00	0.22	5.61	0.58	0.00	0.38	7.64
Zone 4 - Llandeilo other	0.00	0.00	0.11	1.33	0.00	0.00	0.08	1.51
Zone 4 - Llandovery main stores	0.00	0.00	0.11	6.45	0.00	0.00	0.34	6.90
Zone 4 - Llandovery other	0.00	0.00	0.00	1.83	0.48	0.00	0.12	2.43
Zone 4 - Other	0.00	0.00	0.00	0.46	0.00	0.00	0.02	0.48
Zone 5 - Newcastle Emlyn main stores	0.51	0.00	0.00	0.00	3.60	0.00	0.22	4.33
Zone 5 - Newcastle Emlyn other	0.00	0.00	0.00	0.00	0.31	0.00	0.02	0.32
Zone 5 - Other	0.00	0.00	0.00	0.00	1.33	0.00	0.07	1.40
Zone 6 - St. Clears main stores	0.00	0.00	0.00	0.00	0.00	2.31	0.12	2.43
Zone 6 - St. Clears other	0.00	0.00	0.00	0.00	0.00	1.04	0.05	1.10
Zone 6 - Whitland main stores	0.00	0.00	0.00	0.71	0.00	1.58	0.12	2.41
Zone 6 - Whitland other	0.00	0.00	0.00	0.00	0.00	0.97	0.05	1.02
Zone 6 - Other	0.00	0.00	0.00	0.00	0.07	1.33	0.07	1.47
Carmarthenshire sub-total	**83.74**	**151.31**	**99.63**	**31.24**	**20.84**	**27.23**	**55.00**	**468.97**
Brecon	0.00	0.00	0.00	1.08	0.27	0.00		1.35
Cardigan	0.00	0.00	0.00	0.00	5.57	0.79		6.37
Haverfordwest	0.00	0.31	0.00	0.00	0.00	5.26		5.57
Lampeter	0.00	0.00	0.00	1.41	3.33	0.00		4.75
Swansea	1.62	5.34	7.82	7.78	0.34	0.40		23.29
Other	0.00	0.00	0.65	0.08	3.64	2.34		6.71
Other sub-total	**1.62**	**5.65**	**8.47**	**10.36**	**13.15**	**8.79**		**48.04**
TOTAL	**85.36**	**156.96**	**108.10**	**41.59**	**33.99**	**36.02**		**517.01**

Source: Tables 3 and 4

Table 8 - Future 2037 convenience goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2037	**85.96**	**158.73**	**109.42**	**41.98**	**34.08**	**36.35**		**466.51**
Zone 1 - Carmarthen main stores	72.90	6.35	14.11	6.38	14.31	18.61	6.98	139.65
Zone 1 - Carmarthen other	5.33	0.16	0.66	0.08	0.00	1.16	0.39	7.78
Zone 2 - Llanelli main stores	2.41	120.80	13.35	0.08	0.00	0.00	34.16	170.79
Zone 2 - Llanelli other	0.00	6.03	0.33	0.00	0.00	0.00	0.71	7.07
Zone 2 - Burry Port main stores	0.00	5.87	0.00	0.00	0.00	0.00	0.31	6.18
Zone 2 - Burry Port other	0.00	0.63	0.00	0.00	0.00	0.00	0.03	0.67
Zone 2 - Kidwelly main stores	0.60	4.29	0.22	0.00	0.00	0.33	0.29	5.72
Zone 2 - Kidwelly other	0.00	0.95	0.00	0.00	0.00	0.00	0.05	1.00
Zone 3 - Ammanford main stores	0.00	2.54	42.56	5.37	0.00	0.00	8.91	59.38
Zone 3 - Ammanford other	0.00	1.11	3.39	0.08	0.07	0.00	0.25	4.90
Zone 3 - Cross Hands main stores	1.72	4.29	22.10	2.98	0.00	0.00	1.64	32.72
Zone 3 - Other	0.00	0.00	3.72	0.00	0.14	0.07	0.21	4.14
Zone 4 - Llandeilo main stores	0.86	0.00	0.22	5.67	0.58	0.00	0.39	7.71
Zone 4 - Llandeilo other	0.00	0.00	0.11	1.34	0.00	0.00	0.08	1.53
Zone 4 - Llandovery main stores	0.00	0.00	0.11	6.51	0.00	0.00	0.35	6.96
Zone 4 - Llandovery other	0.00	0.00	0.00	1.85	0.48	0.00	0.12	2.45
Zone 4 - Other	0.00	0.00	0.00	0.46	0.00	0.00	0.02	0.49
Zone 5 - Newcastle Emlyn main stores	0.52	0.00	0.00	0.00	3.61	0.00	0.22	4.35
Zone 5 - Newcastle Emlyn other	0.00	0.00	0.00	0.00	0.31	0.00	0.02	0.32
Zone 5 - Other	0.00	0.00	0.00	0.00	1.33	0.00	0.07	1.40
Zone 6 - St. Clears main stores	0.00	0.00	0.00	0.00	0.00	2.33	0.12	2.45
Zone 6 - St. Clears other	0.00	0.00	0.00	0.00	0.00	1.05	0.06	1.11
Zone 6 - Whitland main stores	0.00	0.00	0.00	0.71	0.00	1.60	0.12	2.43
Zone 6 - Whitland other	0.00	0.00	0.00	0.00	0.00	0.98	0.05	1.03
Zone 6 - Other	0.00	0.00	0.00	0.00	0.07	1.34	0.07	1.49
Carmarthenshire sub-total	**84.33**	**153.02**	**100.88**	**31.52**	**20.89**	**27.48**	**55.60**	**473.72**
Brecon	0.00	0.00	0.00	1.09	0.27	0.00		1.36
Cardigan	0.00	0.00	0.00	0.00	5.59	0.80		6.39
Haverfordwest	0.00	0.32	0.00	0.00	0.00	5.31		5.62
Lampeter	0.00	0.00	0.00	1.43	3.34	0.00		4.77
Swansea	1.63	5.40	7.92	7.85	0.34	0.40		23.54
Other	0.00	0.00	0.66	0.08	3.65	2.36		6.75
Other sub-total	**1.63**	**5.71**	**8.58**	**10.45**	**13.19**	**8.87**		**48.43**
TOTAL	**85.96**	**158.73**	**109.46**	**41.98**	**34.08**	**36.35**		**522.15**

Source: Tables 3 and 4

Table 9 - Convenience goods floorspace and benchmark turnover in Carmarthenshire

Location	Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total turnover (£m)
Zone 1	Aldl, Stephens Way RP	930	80%	744	£11,020	£8.20
Carmarthen	Lidl, Morfa Lane	1,028	80%	822	£8,741	£7.19
	Marks & Spencer, Red Street	697	100%	697	£11,095	£7.73
	Morrisons, Parc Pensam RP	3,181	85%	2,704	£12,944	£35.00
	Tesco Extra, Morfa Lane	5,589	65%	3,633	£14,075	£51.13
	Farmfoods, Parc Pensam RP	552	95%	524	£5,664	£2.97
	Home Bargains, Stephens Way	724	30%	217	£5,922	£1.29
	B&M Bargains, Hall Street	725	30%	218	£2,979	£0.65
	Co-op, King Street	347	95%	330	£10,990	£3.62
	Co-op, Jobs Well Road	199	95%	189	£10,990	£2.08
	Spar, Lammas Street	56	95%	53	£9,007	£0.48
	Spar, Johnstown	108	95%	103	£9,007	£0.92
	Sub Total	**14,136**		**10,234**		**£121.26**
Zone 2	Aldi, Swanfield Place	826	80%	661	£11,020	£7.28
Llanelli	Asda, Murray Street	4,621	60%	2,773	£14,248	£39.50
	Home Bargains, Vaughan Street	1,942	20%	388	£5,922	£2.30
	Aldi, Trostre Road	965	80%	772	£11,020	£8.51
	Lidl, The Avenue	1,115	80%	892	£8,741	£7.80
	Iceland, Park Street	402	95%	382	£7,447	£2.84
	Marks & Spencer - Parc Trostre	697	95%	662	£11,095	£7.35
	Morrisons - Pemberton RP	4,244	70%	2,971	£12,944	£38.45
	Iceland Warehouse - Parc Pemberton	730	95%	694	£7,447	£5.16
	B&M - Pemberton RP	918	30%	275	£2,979	£0.82
	Tesco Extra - Parc Trostre	7,181	55%	3,950	£14,075	£55.59
	Home Bargains, Station Road	693	30%	208	£5,922	£1.23
	Farmfoods, Swansea Road	738	95%	701	£5,664	£3.97
	Co-op, Sandy Road	171	95%	162	£10,990	£1.79
	Co-op, Glalliedi, Felinfoel	349	95%	332	£10,990	£3.64
	Co-op, Pontyates	199	95%	189	£10,990	£2.08
	Co-op, Llangennech	185	100%	185	£10,990	£2.03
	Sub-Total	**25,976**		**16,196**		**£190.35**
Zone 2	Co--op, Station Road, Burry Port	359	95%	341	£10,990	£3.75
Burry Port	Co-op, Monksford Street, Kidwelly	975	90%	878	£10,990	£9.64
Kidwelly	**Sub-Total**	**1,334**		**1,219**		**£13.39**
Zone 3	Co-op, High Street, Llanybie	199	95%	189	£10,990	£2.08
Ammanford	Co-op, College Road	199	95%	189	£10,990	£2.08
	Tesco, Park Street	3,433	80%	2,746	£14,075	£38.66
	Lidl, Foundary Road	913	80%	730	£8,741	£6.38
	Iceland, Quay Street	404	95%	384	£7,447	£2.86
	Home Bargains, Quay Street	714	30%	214	£5,922	£1.27
	Sub Total	**5,862**		**4,453**		**£53.32**
Zone 3	Aldi, Llandeilo Road	979	80%	783	£11,020	£8.63
Cross Hands	Lidl, Llandeilo Road	1,028	80%	822	£8,741	£7.19
	Home Bargains, Llandeilo Road	950	30%	285	£5,922	£1.69
	Farmfoods, Cross Hands RP	1,036	95%	984	£5,664	£5.57
	Iceland Warehouse, Cross Hands RP	730	95%	694	£7,447	£5.16
	Sub-Total	**4,723**		**3,568**		**£28.25**
Zone 4	Co-op, Rhosmaen Road, Llandeilo	334	95%	317	£10,990	£3.49
Llandeilo	C.K. Supermarket, Llandeilo	490	95%	466	£7,000	£3.26
Llandovery	Spar, New Road, Llandeilo	91	95%	86	£9,007	£0.78
	Co-op, High Street, Llandovery	599	95%	569	£10,990	£6.25
	Sub-Total	**1,514**		**1,438**		**£13.78**
Zone 5	Co-op, New Road	199	95%	189	£10,990	£2.08
Newcastle	C.K. Supermarket, Station Road	450	95%	428	£7,000	£2.99
Emlyn	**Sub-Total**	**649**		**617**		**£5.07**
Zone 6	Co-op, Station Road, St Clears	347	95%	330	£10,990	£3.62
St Clears	Co-op, North Road, Whitland	128	95%	122	£10,990	£1.34
Whitlands	**Sub-Total**	**475**		**451**		**£4.96**
TOTAL		**54,669**		**38,176**		**£430.38**

Source: *Carmarthenshire Council's Land Use Survey 2022, Valuation Office Agency and ORC StorePoint 2022 and Global Data 2022*

Table 10A - Convenience goods expenditure and expected turnover 2022 to 2037 (£M)

Destination	2022	2027	2032	2037
Available expenditure				
Zone 1 - Carmarthen main stores	136.96	137.45	138.57	139.65
Zone 1 - Carmarthen other	7.63	7.66	7.72	7.78
Zone 2 - Llanelli main stores	166.46	167.23	168.88	170.79
Zone 2 - Llanelli other	6.89	6.92	6.99	7.07
Zone 2 - Burry Port main stores	6.03	6.05	6.11	6.18
Zone 2 - Burry Port other	0.65	0.65	0.66	0.67
Zone 2 - Kidwelly main stores	5.58	5.60	5.66	5.72
Zone 2 - Kidwelly other	0.98	0.98	0.99	1.00
Zone 3 - Ammanford main stores	57.74	58.07	58.67	59.38
Zone 3 - Ammanford other	4.77	4.79	4.84	4.90
Zone 3 - Cross Hands main stores	31.85	32.02	32.34	32.72
Zone 3 - Other	4.02	4.04	4.09	4.14
Zone 4 - Llandeilo main stores	7.56	7.58	7.64	7.71
Zone 4 - Llandeilo other	1.50	1.50	1.51	1.53
Zone 4 - Llandovery main stores	6.82	6.84	6.90	6.96
Zone 4 - Llandovery other	2.40	2.41	2.43	2.45
Zone 4 - Other	0.48	0.48	0.48	0.49
Zone 5 - Newcastle Emlyn main stores	4.28	4.31	4.33	4.35
Zone 5 - Newcastle Emlyn other	0.32	0.32	0.32	0.32
Zone 5 - Other	1.38	1.39	1.40	1.40
Zone 6 - St. Clears main stores	2.39	2.40	2.43	2.45
Zone 6 - St. Clears other	1.08	1.09	1.10	1.11
Zone 6 - Whitland main stores	2.38	2.38	2.41	2.43
Zone 6 - Whitland other	1.01	1.01	1.02	1.03
Zone 6 - Other	1.45	1.46	1.47	1.49
Total	**462.58**	**464.62**	**468.97**	**473.72**
Turnover of existing facilities				
Zone 1 - Carmarthen main stores	121.26	123.69	123.82	123.82
Zone 1 - Carmarthen other	7.63	7.79	7.79	7.79
Zone 2 - Llanelli main stores	190.35	194.17	194.37	194.37
Zone 2 - Llanelli other	6.89	7.03	7.03	7.03
Zone 2 - Burry Port main stores	3.75	3.82	3.83	3.83
Zone 2 - Burry Port other	0.65	0.66	0.67	0.67
Zone 2 - Kidwelly main stores	9.64	9.84	9.85	9.85
Zone 2 - Kidwelly other	0.98	1.00	1.00	1.00
Zone 3 - Ammanford main stores	53.32	54.39	54.45	54.45
Zone 3 - Ammanford other	4.77	4.86	4.87	4.87
Zone 3 - Cross Hands main stores	28.25	28.81	28.84	28.84
Zone 3 - Other	4.02	4.10	4.10	4.10
Zone 4 - Llandeilo main stores	7.52	7.68	7.68	7.68
Zone 4 - Llandeilo other	1.50	1.53	1.53	1.53
Zone 4 - Llandovery main stores	6.25	6.38	6.39	6.39
Zone 4 - Llandovery other	2.40	2.45	2.45	2.45
Zone 4 - Other	0.48	0.49	0.49	0.49
Zone 5 - Newcastle Emlyn main stores	5.07	5.17	5.18	5.18
Zone 5 - Newcastle Emlyn other	0.32	0.32	0.33	0.33
Zone 5 - Other	1.38	1.41	1.41	1.41
Zone 6 - St. Clears main stores	3.62	3.70	3.70	3.70
Zone 6 - St. Clears other	1.08	1.10	1.10	1.10
Zone 6 - Whitland main stores	1.34	1.36	1.36	1.36
Zone 6 - Whitland other	1.01	1.03	1.03	1.03
Zone 6 - Other	1.45	1.48	1.48	1.48
Total	**464.92**	**474.25**	**474.73**	**474.73**

Table 10B - Convenience goods expenditure surplus/defict 2022 to 2037 (£M)

Destination	2022	2027	2032	2037
Surplus/deficit expenditure £M				
Zone 1 - Carmarthen main stores	15.70	13.76	14.75	15.83
Zone 1 - Carmarthen other	0.00	-0.13	-0.07	-0.01
Zone 2 - Llanelli main stores	-23.89	-26.95	-25.49	-23.57
Zone 2 - Llanelli other	0.00	-0.11	-0.05	0.03
Zone 2 - Burry Port main stores	2.28	2.23	2.29	2.36
Zone 2 - Burry Port other	0.00	-0.01	0.00	0.00
Zone 2 - Kidwelly main stores	-4.06	-4.23	-4.19	-4.13
Zone 2 - Kidwelly other	0.00	-0.02	-0.01	0.00
Zone 3 - Ammanford main stores	4.41	3.68	4.22	4.94
Zone 3 - Ammanford other	0.00	-0.07	-0.02	0.03
Zone 3 - Cross Hands main stores	3.60	3.21	3.50	3.88
Zone 3 - Other	0.00	-0.06	-0.02	0.03
Zone 4 - Llandeilo main stores	0.03	-0.10	-0.04	0.03
Zone 4 - Llandeilo other	0.00	-0.03	-0.01	0.00
Zone 4 - Llandovery main stores	0.57	0.46	0.51	0.58
Zone 4 - Llandovery other	0.00	-0.04	-0.02	0.00
Zone 4 - Other	0.00	-0.01	0.00	0.00
Zone 5 - Newcastle Emlyn main stores	-0.79	-0.86	-0.85	-0.83
Zone 5 - Newcastle Emlyn other	0.00	0.00	0.00	0.00
Zone 5 - Other	0.00	-0.02	-0.01	-0.01
Zone 6 - St. Clears main stores	-1.24	-1.30	-1.27	-1.25
Zone 6 - St. Clears other	0.00	-0.02	0.00	0.01
Zone 6 - Whitland main stores	1.04	1.02	1.05	1.07
Zone 6 - Whitland other	0.00	-0.02	0.00	0.00
Zone 6 - Other	0.00	-0.02	-0.01	0.01
Total	**-2.34**	**-9.63**	**-5.76**	**-1.01**

Source: Table 10A

Table 11 - Convenience goods floorspace capacity up to 2037

	2022	2027	2032	2037
Turnover density new floorspace (£ per sq.m)	£12,000	£12,241	£12,253	£12,253
Floorspace projection (sq.m net)				
Zone 1 - Carmarthen	1,308	1,113	1,198	1,291
Zone 2 - Llanelli	-1,991	-2,210	-2,084	-1,921
Zone 2 - Burry Port	190	181	186	192
Zone 2 - Kidwelly	-339	-347	-342	-336
Zone 3 - Ammanford	368	295	343	406
Zone 3 - Cross Hands	300	262	286	317
Zone 3 - Other	0	-5	-1	3
Zone 4 - Llandeilo	3	-10	-4	2
Zone 4 - Llandovery	47	34	40	47
Zone 4 - Other	0	-1	0	0
Zone 5 - Newcastle Emlyn	-66	-71	-69	-68
Zone 5 - Other	0	-1	-1	-1
Zone 6 - St. Clears	-103	-108	-104	-102
Zone 6 - Whitland	87	82	85	88
Zone 6 - Other	0	-2	-1	0
Total	**-195**	**-787**	**-470**	**-82**
Floorspace Projection (sq.m gross)				
Zone 1 - Carmarthen	1,869	1,590	1,711	1,844
Zone 2 - Llanelli	-2,844	-3,157	-2,977	-2,744
Zone 2 - Burry Port	271	259	266	275
Zone 2 - Kidwelly	-484	-496	-489	-481
Zone 3 - Ammanford	526	422	490	580
Zone 3 - Cross Hands	429	374	408	453
Zone 3 - Other	0	-6	-2	4
Zone 4 - Llandeilo	4	-14	-6	3
Zone 4 - Llandovery	68	48	57	67
Zone 4 - Other	0	-1	-1	0
Zone 5 - Newcastle Emlyn	-94	-101	-99	-97
Zone 5 - Other	0	-2	-2	-1
Zone 6 - St. Clears	-147	-154	-149	-145
Zone 6 - Whitland	124	117	122	125
Zone 6 - Other	0	-3	-1	1
Total	**-279**	**-1,124**	**-671**	**-118**

Source: Table 10B

Appendix 3 : Comparison assessment

Table 1 - Study area population projections

	2022	2027	2032	2037
Zone 1 - Carmarthen	34,801	35,117	35,331	35,522
Zone 2 - Llanelli/ Burry Port/ Kidwelly	70,112	70,905	71,539	72,217
Zone 3 - Ammanford/ Cross Hands	47,588	48,215	48,697	49,220
Zone 4 - Llandeilo/ Llandovery	16,351	16,495	16,637	16,764
Zone 5 - Newcastle Emlyn	13,269	13,454	13,504	13,517
Zone 6 - St. Clears/ Whitland	14,438	14,589	14,768	14,878
Total	**196,559**	**198,775**	**200,476**	**202,118**

Sources: *Experian MMG 3 population projections*

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

	2022	2027	2032	2037
Zone 1 - Carmarthen	3,252	3,572	4,021	4,580
Zone 2 - Llanelli/ Burry Port/ Kidwelly	2,789	3,063	3,447	3,927
Zone 3 - Ammanford/ Cross Hands	2,879	3,162	3,559	4,054
Zone 4 - Llandeilo/ Llandovery	3,354	3,683	4,146	4,723
Zone 5 - Newcastle Emlyn	3,410	3,745	4,216	4,802
Zone 6 - St. Clears/ Whitland	3,355	3,685	4,148	4,725

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

Table 3 - Total comparison goods expenditure (£m)

	2022	2027	2032	2037
Zone 1 - Carmarthen	113.17	125.44	142.07	162.69
Zone 2 - Llanelli/ Burry Port/ Kidwelly	195.54	217.18	246.59	283.60
Zone 3 - Ammanford/ Cross Hands	137.01	152.46	173.31	199.54
Zone 4 - Llandeilo/ Llandovery	54.84	60.75	68.98	79.18
Zone 5 - Newcastle Emlyn	45.25	50.39	56.93	64.91
Zone 6 - St. Clears/ Whitland	48.44	53.76	61.26	70.30
Total	**594.25**	**659.97**	**749.14**	**860.21**

Source: Tables 1 and 2

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

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow
Zone 1 - Carmarthen town centre	52.4%	4.2%	9.4%	24.9%	30.8%	35.7%	10.0%
Zone 1 - Carmarthen out of centre	25.1%	2.0%	8.2%	12.6%	31.1%	21.5%	10.0%
Zone 1 - Other	0.3%	0.0%	0.1%	0.0%	0.1%	0.2%	5.0%
Zone 2 - Llanelli town centre	0.5%	14.8%	3.5%	0.3%	0.0%	1.9%	15.0%
Zone 2 - Llanelli out of centre	3.6%	58.8%	24.7%	1.6%	1.8%	3.0%	20.0%
Zone 2 - Burry Port	0.0%	0.2%	0.0%	0.6%	0.0%	0.0%	5.0%
Zone 2 - Kidwelly	0.0%	0.8%	0.1%	0.0%	0.0%	0.5%	5.0%
Zone 2 - Other	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	5.0%
Zone 3 - Ammanford	0.0%	0.4%	16.5%	2.0%	0.0%	0.0%	10.0%
Zone 3 - Cross Hands	2.7%	1.4%	14.7%	3.9%	1.0%	1.1%	15.0%
Zone 3 - Other	0.0%	0.2%	0.4%	1.0%	0.0%	0.0%	5.0%
Zone 4 - Llandeilo	0.8%	0.5%	0.5%	14.3%	0.5%	0.0%	5.0%
Zone 4 - Llandovery	0.0%	0.0%	0.0%	20.1%	0.0%	0.0%	5.0%
Zone 4 - Other	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	5.0%
Zone 5 - Newcastle Emlyn	0.2%	0.0%	0.0%	0.0%	13.3%	0.1%	10.0%
Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	5.0%
Zone 6 - St. Clears	0.1%	0.0%	0.0%	0.0%	0.0%	9.0%	5.0%
Zone 6 - Whitland	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	5.0%
Carmarthenshire sub-total	**85.7%**	**83.7%**	**78.1%**	**81.6%**	**81.3%**	**76.2%**	
Brecon	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	
Bridgend	0.7%	0.3%	0.9%	0.8%	0.0%	0.0%	
Cardiff	0.3%	0.0%	0.0%	0.0%	2.7%	2.1%	
Cardigan	3.5%	3.7%	0.9%	2.1%	2.1%	1.9%	
Haverfordwest	0.1%	0.0%	0.1%	0.1%	0.2%	10.7%	
Lampeter	0.0%	0.0%	0.0%	0.7%	4.9%	0.0%	
Swansea	7.5%	10.0%	16.4%	8.8%	0.2%	1.6%	
Other	2.2%	2.3%	3.6%	3.1%	8.6%	7.5%	
Other sub-total	**14.3%**	**16.3%**	**21.9%**	**18.4%**	**18.7%**	**23.8%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

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

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

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2022	**113.17**	**195.54**	**137.01**	**54.84**	**45.25**	**48.44**		**594.25**
Zone 1 - Carmarthen town centre	59.30	8.21	12.88	13.66	13.94	17.29	13.92	139.20
Zone 1 - Carmarthen out of centre	28.41	3.91	11.23	6.91	14.07	10.41	8.33	83.28
Zone 1 - Other	0.34	0.00	0.14	0.00	0.05	0.10	0.03	0.65
Zone 2 - Llanelli town centre	0.57	28.94	4.80	0.16	0.00	0.92	6.24	41.63
Zone 2 - Llanelli out of centre	4.07	114.98	33.84	0.88	0.81	1.45	39.01	195.05
Zone 2 - Burry Port	0.00	0.39	0.00	0.33	0.00	0.00	0.04	0.76
Zone 2 - Kidwelly	0.00	1.56	0.14	0.00	0.00	0.24	0.10	2.05
Zone 2 - Other	0.00	0.78	0.00	0.00	0.00	0.00	0.04	0.82
Zone 3 - Ammanford	0.00	0.78	22.61	1.10	0.00	0.00	2.72	27.21
Zone 3 - Cross Hands	3.06	2.74	20.14	2.14	0.45	0.53	5.13	34.18
Zone 3 - Other	0.00	0.39	0.55	0.55	0.00	0.00	0.08	1.57
Zone 4 - Llandeilo	0.91	0.98	0.69	7.84	0.23	0.00	0.56	11.20
Zone 4 - Llandovery	0.00	0.00	0.00	11.02	0.00	0.00	0.58	11.60
Zone 4 - Other	0.00	0.00	0.00	0.16	0.00	0.00	0.01	0.17
Zone 5 - Newcastle Emlyn	0.23	0.00	0.00	0.00	6.02	0.05	0.70	6.99
Zone 5 - Other	0.00	0.00	0.00	0.00	1.22	0.00	0.06	1.29
Zone 6 - St. Clears	0.11	0.00	0.00	0.00	0.00	4.36	0.24	4.71
Zone 6 - Whitland	0.00	0.00	0.00	0.00	0.00	1.55	0.08	1.63
Carmarthenshire sub-total	**96.99**	**163.67**	**107.00**	**44.75**	**36.79**	**36.91**	**77.87**	**563.98**
Brecon	0.00	0.00	0.00	1.54	0.00	0.00		1.54
Bridgend	0.79	0.59	1.23	0.44	0.00	0.00		3.05
Cardiff	0.34	0.00	0.00	0.00	1.22	1.02		2.58
Cardigan	3.96	7.24	1.23	1.15	0.95	0.92		15.45
Haverfordwest	0.11	0.00	0.14	0.05	0.09	5.18		5.58
Lampeter	0.00	0.00	0.00	0.38	2.22	0.00		2.60
Swansea	8.49	19.55	22.47	4.83	0.09	0.78		56.20
Other	2.49	4.50	4.93	1.70	3.89	3.63		21.14
Other sub-total	**16.18**	**31.87**	**30.00**	**10.09**	**8.46**	**11.53**		**108.14**
TOTAL	**113.17**	**195.54**	**137.01**	**54.84**	**45.25**	**48.44**		**672.12**

Source: Tables 3 and 4

Table 6 - Future 2027 comparison goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2027	**125.44**	**217.18**	**152.46**	**60.75**	**50.39**	**53.76**		**659.97**
Zone 1 - Carmarthen town centre	65.73	9.12	14.33	15.13	15.52	19.19	15.45	154.47
Zone 1 - Carmarthen out of centre	31.48	4.34	12.50	7.65	15.67	11.56	9.25	92.46
Zone 1 - Other	0.38	0.00	0.15	0.00	0.05	0.11	0.04	0.72
Zone 2 - Llanelli town centre	0.63	32.14	5.34	0.18	0.00	1.02	6.94	46.25
Zone 2 - Llanelli out of centre	4.52	127.70	37.66	0.97	0.91	1.61	43.34	216.71
Zone 2 - Burry Port	0.00	0.43	0.00	0.36	0.00	0.00	0.04	0.84
Zone 2 - Kidwelly	0.00	1.74	0.15	0.00	0.00	0.27	0.11	2.27
Zone 2 - Other	0.00	0.87	0.00	0.00	0.00	0.00	0.05	0.91
Zone 3 - Ammanford	0.00	0.87	25.16	1.22	0.00	0.00	3.03	30.27
Zone 3 - Cross Hands	3.39	3.04	22.41	2.37	0.50	0.59	5.70	38.00
Zone 3 - Other	0.00	0.43	0.61	0.61	0.00	0.00	0.09	1.74
Zone 4 - Llandeilo	1.00	1.09	0.76	8.69	0.25	0.00	0.62	12.41
Zone 4 - Llandovery	0.00	0.00	0.00	12.21	0.00	0.00	0.64	12.85
Zone 4 - Other	0.00	0.00	0.00	0.18	0.00	0.00	0.01	0.19
Zone 5 - Newcastle Emlyn	0.25	0.00	0.00	0.00	6.70	0.05	0.78	7.78
Zone 5 - Other	0.00	0.00	0.00	0.00	1.36	0.00	0.07	1.43
Zone 6 - St. Clears	0.13	0.00	0.00	0.00	0.00	4.84	0.26	5.23
Zone 6 - Whitland	0.00	0.00	0.00	0.00	0.00	1.72	0.09	1.81
Carmarthenshire sub-total	**107.50**	**181.78**	**119.07**	**49.57**	**40.96**	**40.97**	**86.50**	**626.35**
Brecon	0.00	0.00	0.00	1.70	0.00	0.00		1.70
Bridgend	0.88	0.65	1.37	0.49	0.00	0.00		3.39
Cardiff	0.38	0.00	0.00	0.00	1.36	1.13		2.87
Cardigan	4.39	8.04	1.37	1.28	1.06	1.02		17.15
Haverfordwest	0.13	0.00	0.15	0.06	0.10	5.75		6.19
Lampeter	0.00	0.00	0.00	0.43	2.47	0.00		2.89
Swansea	9.41	21.72	25.00	5.35	0.10	0.86		62.44
Other	2.76	5.00	5.49	1.88	4.33	4.03		23.49
Other sub-total	**17.94**	**35.40**	**33.39**	**11.18**	**9.42**	**12.79**		**120.12**
TOTAL	**125.44**	**217.18**	**152.46**	**60.75**	**50.39**	**53.76**		**746.47**

Source: Tables 3 and 4

Table 7 - Future 2032 comparison goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2032	**142.07**	**246.59**	**173.31**	**68.98**	**56.93**	**61.26**		**749.14**
Zone 1 - Carmarthen town centre	74.44	10.36	16.29	17.18	17.54	21.87	17.52	175.19
Zone 1 - Carmarthen out of centre	35.66	4.93	14.21	8.69	17.71	13.17	10.49	104.86
Zone 1 - Other	0.43	0.00	0.17	0.00	0.06	0.12	0.04	0.82
Zone 2 - Llanelli town centre	0.71	36.50	6.07	0.21	0.00	1.16	7.88	52.52
Zone 2 - Llanelli out of centre	5.11	145.00	42.81	1.10	1.02	1.84	49.22	246.11
Zone 2 - Burry Port	0.00	0.49	0.00	0.41	0.00	0.00	0.05	0.95
Zone 2 - Kidwelly	0.00	1.97	0.17	0.00	0.00	0.31	0.13	2.58
Zone 2 - Other	0.00	0.99	0.00	0.00	0.00	0.00	0.05	1.04
Zone 3 - Ammanford	0.00	0.99	28.60	1.38	0.00	0.00	3.44	34.40
Zone 3 - Cross Hands	3.84	3.45	25.48	2.69	0.57	0.67	6.48	43.17
Zone 3 - Other	0.00	0.49	0.69	0.69	0.00	0.00	0.10	1.97
Zone 4 - Llandeilo	1.14	1.23	0.87	9.86	0.28	0.00	0.70	14.09
Zone 4 - Llandovery	0.00	0.00	0.00	13.86	0.00	0.00	0.73	14.59
Zone 4 - Other	0.00	0.00	0.00	0.21	0.00	0.00	0.01	0.22
Zone 5 - Newcastle Emlyn	0.28	0.00	0.00	0.00	7.57	0.06	0.88	8.80
Zone 5 - Other	0.00	0.00	0.00	0.00	1.54	0.00	0.08	1.62
Zone 6 - St. Clears	0.14	0.00	0.00	0.00	0.00	5.51	0.30	5.95
Zone 6 - Whitland	0.00	0.00	0.00	0.00	0.00	1.96	0.10	2.06
Carmarthenshire sub-total	**121.75**	**206.40**	**135.36**	**56.29**	**46.29**	**46.68**	**98.20**	**710.95**
Brecon	0.00	0.00	0.00	1.93	0.00	0.00		1.93
Bridgend	0.99	0.74	1.56	0.55	0.00	0.00		3.85
Cardiff	0.43	0.00	0.00	0.00	1.54	1.29		3.25
Cardigan	4.97	9.12	1.56	1.45	1.20	1.16		19.46
Haverfordwest	0.14	0.00	0.17	0.07	0.11	6.55		7.05
Lampeter	0.00	0.00	0.00	0.48	2.79	0.00		3.27
Swansea	10.65	24.66	28.42	6.07	0.11	0.98		70.90
Other	3.13	5.67	6.24	2.14	4.90	4.59		26.67
Other sub-total	**20.32**	**40.19**	**37.96**	**12.69**	**10.65**	**14.58**		**136.38**
TOTAL	**142.07**	**246.59**	**173.31**	**68.98**	**56.93**	**61.26**		**847.34**

Source: Tables 3 and 4

Table 8 - Future 2037 comparison goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2037	**162.69**	**283.60**	**199.54**	**79.18**	**64.91**	**70.30**		**860.21**
Zone 1 - Carmarthen town centre	85.25	11.91	18.76	19.71	19.99	25.10	20.08	200.80
Zone 1 - Carmarthen out of centre	40.84	5.67	16.36	9.98	20.19	15.11	12.02	120.16
Zone 1 - Other	0.49	0.00	0.20	0.00	0.06	0.14	0.05	0.94
Zone 2 - Llanelli town centre	0.81	41.97	6.98	0.24	0.00	1.34	9.06	60.40
Zone 2 - Llanelli out of centre	5.86	166.75	49.29	1.27	1.17	2.11	56.61	283.05
Zone 2 - Burry Port	0.00	0.57	0.00	0.48	0.00	0.00	0.05	1.10
Zone 2 - Kidwelly	0.00	2.27	0.20	0.00	0.00	0.35	0.15	2.97
Zone 2 - Other	0.00	1.13	0.00	0.00	0.00	0.00	0.06	1.19
Zone 3 - Ammanford	0.00	1.13	32.92	1.58	0.00	0.00	3.96	39.60
Zone 3 - Cross Hands	4.39	3.97	29.33	3.09	0.65	0.77	7.45	49.65
Zone 3 - Other	0.00	0.57	0.80	0.79	0.00	0.00	0.11	2.27
Zone 4 - Llandeilo	1.30	1.42	1.00	11.32	0.32	0.00	0.81	16.17
Zone 4 - Llandovery	0.00	0.00	0.00	15.91	0.00	0.00	0.84	16.75
Zone 4 - Other	0.00	0.00	0.00	0.24	0.00	0.00	0.01	0.25
Zone 5 - Newcastle Emlyn	0.33	0.00	0.00	0.00	8.63	0.07	1.00	10.03
Zone 5 - Other	0.00	0.00	0.00	0.00	1.75	0.00	0.09	1.84
Zone 6 - St. Clears	0.16	0.00	0.00	0.00	0.00	6.33	0.34	6.83
Zone 6 - Whitland	0.00	0.00	0.00	0.00	0.00	2.25	0.12	2.37
Carmarthenshire sub-total	**139.43**	**237.37**	**155.84**	**64.61**	**52.77**	**53.57**	**112.81**	**816.39**
Brecon	0.00	0.00	0.00	2.22	0.00	0.00		2.22
Bridgend	1.14	0.85	1.80	0.63	0.00	0.00		4.42
Cardiff	0.49	0.00	0.00	0.00	1.75	1.48		3.72
Cardigan	5.69	10.49	1.80	1.66	1.36	1.34		22.34
Haverfordwest	0.16	0.00	0.20	0.08	0.13	7.52		8.09
Lampeter	0.00	0.00	0.00	0.55	3.18	0.00		3.73
Swansea	12.20	28.36	32.72	6.97	0.13	1.12		81.51
Other	3.58	6.52	7.18	2.45	5.58	5.27		30.59
Other sub-total	**23.26**	**46.23**	**43.70**	**14.57**	**12.14**	**16.73**		**156.63**
TOTAL	**162.69**	**283.60**	**199.54**	**79.18**	**64.91**	**70.30**		**973.02**

Source: Tables 3 and 4

Table 9 - Comparison goods floorspace in Carmarthenshire

		Gross floorspace (sq.m)	% net sales to gross	Comparison goods sales floorspace (sq.m net)
Zone 1	Carmarthen town centre	30,321	75%	22,741
	Carmarthen retail parks	17,600	85%	14,960
	Carmarthen food superstores	n/a	n/a	2,433
	Sub Total	**47,921**		**40,134**
Zone 2	Llanelli town centre	15,700	75%	11,775
	Llanelli retail parks	35,700	85%	30,345
	Carmarthen food superstores	n/a	n/a	6,352
	Sub-Total	**51,400**		**48,472**
Zone 2	Burry Port town centre	1,017	60%	610
	Kidwelly	985	60%	591
	Sub-Total	**2,002**		**1,201**
Zone 3	Ammanford town centre	11,528	60%	6,917
	Cross Hands	26,387	75%	19,790
	Sub-Total	**37,915**		**26,707**
Zone 4	Llandeilo town centre	3,467	60%	2,080
	Llandovery town centre	3,537	60%	2,122
	Sub-Total	**7,004**		**4,202**
Zone 5	Newcastle Emlyn town centre	**5,581**	60%	**3,349**
Zone 6	St Clears town centre	5,655	60%	3,393
	Whitlands town centre	765	60%	459
	Sub-Total	**6,420**		**3,852**
TOTAL		**158,243**		**127,917**

Source: *Carmarthenshire Council's Land Use Survey 2022 and Valuation Office Agency.*

Table 10 - Summary of comparison goods expenditure 2022 to 2037 (£M)

Destination	2022	2027	2032	2037
Available expenditure				
Zone 1 - Carmarthen town centre	139.20	154.47	175.19	200.80
Zone 1 - Carmarthen out of centre	83.28	92.46	104.86	120.16
Zone 1 - Other	0.65	0.72	0.82	0.94
Zone 2 - Llanelli town centre	41.63	46.25	52.52	60.40
Zone 2 - Llanelli out of centre	195.05	216.71	246.11	283.05
Zone 2 - Burry Port	0.76	0.84	0.95	1.10
Zone 2 - Kidwelly	2.05	2.27	2.58	2.97
Zone 2 - Other	0.82	0.91	1.04	1.19
Zone 3 - Ammanford	27.21	30.27	34.40	39.60
Zone 3 - Cross Hands	34.18	38.00	43.17	49.65
Zone 3 - Other	1.57	1.74	1.97	2.27
Zone 4 - Llandeilo	11.20	12.41	14.09	16.17
Zone 4 - Llandovery	11.60	12.85	14.59	16.75
Zone 4 - Other	0.17	0.19	0.22	0.25
Zone 5 - Newcastle Emlyn	6.99	7.78	8.80	10.03
Zone 5 - Other	1.29	1.43	1.62	1.84
Zone 6 - St. Clears	4.71	5.23	5.95	6.83
Zone 6 - Whitland	1.63	1.81	2.06	2.37
Total	**563.98**	**626.35**	**710.95**	**816.39**
Turnover of existing facilities				
Zone 1 - Carmarthen town centre	139.20	155.35	175.94	200.03
Zone 1 - Carmarthen out of centre	83.28	92.94	105.25	119.67
Zone 1 - Other	0.65	0.73	0.82	0.94
Zone 2 - Llanelli town centre	41.63	46.46	52.62	59.82
Zone 2 - Llanelli out of centre	195.05	217.68	246.53	280.28
Zone 2 - Burry Port	0.76	0.85	0.96	1.09
Zone 2 - Kidwelly	2.05	2.28	2.59	2.94
Zone 2 - Other	0.82	0.92	1.04	1.18
Zone 3 - Ammanford	27.21	30.36	34.39	39.09
Zone 3 - Cross Hands	34.18	38.15	43.21	49.12
Zone 3 - Other	1.57	1.75	1.98	2.25
Zone 4 - Llandeilo	11.20	12.50	14.15	16.09
Zone 4 - Llandovery	11.60	12.95	14.67	16.67
Zone 4 - Other	0.17	0.19	0.22	0.25
Zone 5 - Newcastle Emlyn	6.99	7.80	8.84	10.05
Zone 5 - Other	1.29	1.44	1.63	1.85
Zone 6 - St. Clears	4.71	5.25	5.95	6.77
Zone 6 - Whitland	1.63	1.82	2.06	2.34
Total	**563.98**	**629.42**	**712.82**	**810.44**
Surplus/deficit expenditure £M				
Zone 1 - Carmarthen town centre	0.00	-0.88	-0.75	0.77
Zone 1 - Carmarthen out of centre	0.00	-0.48	-0.40	0.50
Zone 1 - Other	0.00	0.00	0.00	0.00
Zone 2 - Llanelli town centre	0.00	-0.21	-0.10	0.58
Zone 2 - Llanelli out of centre	0.00	-0.97	-0.42	2.77
Zone 2 - Burry Port	0.00	-0.01	0.00	0.01
Zone 2 - Kidwelly	0.00	-0.01	0.00	0.03
Zone 2 - Other	0.00	0.00	0.00	0.01
Zone 3 - Ammanford	0.00	-0.10	0.02	0.51
Zone 3 - Cross Hands	0.00	-0.15	-0.03	0.53
Zone 3 - Other	0.00	-0.01	0.00	0.02
Zone 4 - Llandeilo	0.00	-0.08	-0.06	0.08
Zone 4 - Llandovery	0.00	-0.10	-0.07	0.08
Zone 4 - Other	0.00	0.00	0.00	0.00
Zone 5 - Newcastle Emlyn	0.00	-0.02	-0.04	-0.02
Zone 5 - Other	0.00	0.00	-0.01	0.00
Zone 6 - St. Clears	0.00	-0.03	0.00	0.07
Zone 6 - Whitland	0.00	-0.01	0.00	0.02
Total	**0.00**	**-3.07**	**-1.87**	**5.96**

Source: Tables 5 to 8

Table 11 - Comparison goods floorspace capacity up to 2037

	2022	2027	2032	2037
Turnover density new floorspace (£ per sq.m)	£5,000	£5,580	£6,320	£7,185
Floorspace projection (sq.m net)				
Zone 1 - Carmarthen	0	-244	-181	177
Zone 1 - Other	0	-1	0	1
Zone 2 - Llanelli	0	-213	-81	466
Zone 2 - Burry Port	0	-1	-1	1
Zone 2 - Kidwelly	0	-2	-1	4
Zone 2 - Other	0	-1	0	2
Zone 3 - Ammanford	0	-17	3	71
Zone 3 - Cross Hands	0	-27	-5	74
Zone 3 - Other	0	-2	-1	3
Zone 4 - Llandeilo	0	-15	-10	12
Zone 4 - Llandovery	0	-17	-11	11
Zone 4 - Other	0	0	0	0
Zone 5 - Newcastle Emlyn	0	-3	-6	-2
Zone 5 - Other	0	-1	-1	0
Zone 6 - St. Clears	0	-5	0	9
Zone 6 - Whitland	0	-2	0	3
Total	**0**	**-551**	**-296**	**829**
Floorspace Projection (sq.m gross)				
Zone 1 - Carmarthen	0	-326	-241	235
Zone 1 - Other	0	-1	-1	1
Zone 2 - Llanelli	0	-284	-108	621
Zone 2 - Burry Port	0	-1	-1	1
Zone 2 - Kidwelly	0	-3	-1	5
Zone 2 - Other	0	-1	0	2
Zone 3 - Ammanford	0	-23	4	94
Zone 3 - Cross Hands	0	-35	-7	98
Zone 3 - Other	0	-2	-1	4
Zone 4 - Llandeilo	0	-20	-13	15
Zone 4 - Llandovery	0	-23	-15	15
Zone 4 - Other	0	0	0	0
Zone 5 - Newcastle Emlyn	0	-5	-8	-3
Zone 5 - Other	0	-1	-2	-1
Zone 6 - St. Clears	0	-7	0	12
Zone 6 - Whitland	0	-2	0	4
Total	**0**	**-734**	**-395**	**1,106**

Source: Table 10

Appendix 4 : Food/beverage assessment

Table 1 - Study area population projections

	2022	2027	2032	2037
Zone 1 - Carmarthen	34,801	35,117	35,331	35,522
Zone 2 - Llanelli/ Burry Port/ Kidwelly	70,112	70,905	71,539	72,217
Zone 3 - Ammanford/ Cross Hands	47,588	48,215	48,697	49,220
Zone 4 - Llandeilo/ Llandovery	16,351	16,495	16,637	16,764
Zone 5 - Newcastle Emlyn	13,269	13,454	13,504	13,517
Zone 6 - St. Clears/ Whitland	14,438	14,589	14,768	14,878
Total	**196,559**	**198,775**	**200,476**	**202,118**

Sources: *Experian MMG 3 population projections*

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

	2022	2027	2032	2037
Zone 1 - Carmarthen	1,321	1,394	1,460	1,527
Zone 2 - Llanelli/ Burry Port/ Kidwelly	1,150	1,213	1,271	1,329
Zone 3 - Ammanford/ Cross Hands	1,186	1,251	1,311	1,371
Zone 4 - Llandeilo/ Llandovery	1,284	1,355	1,420	1,485
Zone 5 - Newcastle Emlyn	1,281	1,352	1,417	1,482
Zone 6 - St. Clears/ Whitland	1,265	1,334	1,398	1,462

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

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

	2022	2027	2032	2037
Zone 1 - Carmarthen	45.97	48.95	51.58	54.24
Zone 2 - Llanelli/ Burry Port/ Kidwelly	80.63	86.01	90.93	95.98
Zone 3 - Ammanford/ Cross Hands	56.44	60.32	63.84	67.48
Zone 4 - Llandeilo/ Llandovery	20.99	22.35	23.62	24.89
Zone 5 - Newcastle Emlyn	17.00	18.19	19.14	20.03
Zone 6 - St. Clears/ Whitland	18.26	19.46	20.65	21.75
Total	**239.30**	**255.28**	**269.76**	**284.38**

Source: Tables 1 and 2

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

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow
Zone 1 - Carmarthen	88.7%	7.5%	14.6%	8.7%	19.9%	28.8%	10.0%
Zone 1 - Other	0.3%	0.0%	0.6%	0.0%	0.6%	0.0%	5.0%
Zone 2 - Llanelli	1.1%	44.0%	11.1%	3.5%	0.0%	0.0%	15.0%
Zone 2 - Burry Port	0.0%	10.1%	0.0%	0.0%	0.0%	0.3%	5.0%
Zone 2 - Kidwelly	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%	5.0%
Zone 2 -Other	0.0%	3.4%	0.8%	0.0%	0.0%	0.0%	5.0%
Zone 3 - Ammanford	1.3%	0.7%	24.2%	2.0%	0.0%	0.0%	10.0%
Zone 3 - Cross Hands	0.0%	0.4%	6.0%	0.0%	0.0%	0.0%	10.0%
Zone 3 - Other	0.0%	0.4%	11.4%	1.0%	1.8%	0.0%	5.0%
Zone 4 - Llandeilo	1.0%	0.0%	7.3%	37.9%	0.6%	1.7%	5.0%
Zone 4 - Llandovery	0.1%	0.0%	0.0%	25.3%	4.2%	1.0%	5.0%
Zone 4 - Other	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	5.0%
Zone 5 - Newcastle Emlyn	0.0%	0.0%	0.0%	0.0%	12.6%	0.0%	10.0%
Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	7.5%	0.0%	5.0%
Zone 6 - St. Clears	0.0%	0.0%	0.0%	0.0%	0.0%	9.3%	5.0%
Zone 6 - Whitland	0.0%	0.0%	0.0%	0.0%	0.6%	13.7%	5.0%
Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	5.0%
Carmarthenshire sub-total	**92.5%**	**70.3%**	**76.0%**	**80.7%**	**47.8%**	**55.5%**	
Brecon	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	
Cardiff	1.8%	4.7%	1.4%	1.6%	0.0%	5.1%	
Cardigan	0.3%	0.0%	0.0%	0.5%	11.5%	0.0%	
Haverfordwest	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	
Lampeter	0.0%	0.0%	0.0%	2.9%	9.8%	0.0%	
Swansea	1.5%	21.9%	10.6%	4.5%	1.8%	0.0%	
Other	3.9%	3.1%	12.0%	9.8%	28.2%	36.7%	
Other sub-total	**7.5%**	**29.7%**	**24.0%**	**19.3%**	**52.2%**	**44.5%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

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

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

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2022	**45.97**	**80.63**	**56.44**	**20.99**	**17.00**	**18.26**		**239.30**
Zone 1 - Carmarthen	40.78	6.05	8.24	1.83	3.38	5.26	7.28	72.82
Zone 1 - Other	0.14	0.00	0.34	0.00	0.10	0.00	0.03	0.61
Zone 2 - Llanelli	0.51	35.48	6.26	0.73	0.00	0.00	7.59	50.57
Zone 2 - Burry Port	0.00	8.14	0.00	0.00	0.00	0.05	0.43	8.63
Zone 2 - Kidwelly	0.00	3.06	0.00	0.00	0.00	0.00	0.16	3.23
Zone 2 -Other	0.00	2.74	0.45	0.00	0.00	0.00	0.17	3.36
Zone 3 - Ammanford	0.60	0.56	13.66	0.42	0.00	0.00	1.69	16.93
Zone 3 - Cross Hands	0.00	0.32	3.39	0.00	0.00	0.00	0.41	4.12
Zone 3 - Other	0.00	0.32	6.43	0.21	0.31	0.00	0.38	7.66
Zone 4 - Llandeilo	0.46	0.00	4.12	7.96	0.10	0.31	0.68	13.63
Zone 4 - Llandovery	0.05	0.00	0.00	5.31	0.71	0.18	0.33	6.58
Zone 4 - Other	0.00	0.00	0.00	0.48	0.00	0.00	0.03	0.51
Zone 5 - Newcastle Emlyn	0.00	0.00	0.00	0.00	2.14	0.00	0.24	2.38
Zone 5 - Other	0.00	0.00	0.00	0.00	1.27	0.00	0.07	1.34
Zone 6 - St. Clears	0.00	0.00	0.00	0.00	0.00	1.70	0.09	1.79
Zone 6 - Whitland	0.00	0.00	0.00	0.00	0.10	2.50	0.14	2.74
Zone 6 - Other	0.00	0.00	0.00	0.00	0.00	0.13	0.01	0.13
Carmarthenshire sub-total	**42.52**	**56.68**	**42.89**	**16.94**	**8.12**	**10.14**	**19.72**	**197.02**
Brecon	0.00	0.00	0.00	0.00	0.15	0.00		0.15
Cardiff	0.83	3.79	0.79	0.34	0.00	0.93		6.67
Cardigan	0.14	0.00	0.00	0.10	1.95	0.00		2.20
Haverfordwest	0.00	0.00	0.00	0.00	0.00	0.49		0.49
Lampeter	0.00	0.00	0.00	0.61	1.67	0.00		2.27
Swansea	0.69	17.66	5.98	0.94	0.31	0.00		25.58
Other	1.79	2.50	6.77	2.06	4.79	6.70		24.62
Other sub-total	**3.45**	**23.95**	**13.55**	**4.05**	**8.87**	**8.13**		**61.99**
TOTAL	**45.97**	**80.63**	**56.44**	**20.99**	**17.00**	**18.26**		**259.02**

Source: Tables 3 and 4

Table 6 - Future 2027 food/beverage expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2027	**48.95**	**86.01**	**60.32**	**22.35**	**18.19**	**19.46**		**255.28**
Zone 1 - Carmarthen	43.42	6.45	8.81	1.94	3.62	5.60	7.76	77.61
Zone 1 - Other	0.15	0.00	0.36	0.00	0.11	0.00	0.03	0.65
Zone 2 - Llanelli	0.54	37.84	6.70	0.78	0.00	0.00	8.09	53.95
Zone 2 - Burry Port	0.00	8.69	0.00	0.00	0.00	0.06	0.46	9.21
Zone 2 - Kidwelly	0.00	3.27	0.00	0.00	0.00	0.00	0.17	3.44
Zone 2 -Other	0.00	2.92	0.48	0.00	0.00	0.00	0.18	3.59
Zone 3 - Ammanford	0.64	0.60	14.60	0.45	0.00	0.00	1.81	18.09
Zone 3 - Cross Hands	0.00	0.34	3.62	0.00	0.00	0.00	0.44	4.40
Zone 3 - Other	0.00	0.34	6.88	0.22	0.33	0.00	0.41	8.18
Zone 4 - Llandeilo	0.49	0.00	4.40	8.47	0.11	0.33	0.73	14.53
Zone 4 - Llandovery	0.05	0.00	0.00	5.65	0.76	0.19	0.35	7.01
Zone 4 - Other	0.00	0.00	0.00	0.51	0.00	0.00	0.03	0.54
Zone 5 - Newcastle Emlyn	0.00	0.00	0.00	0.00	2.29	0.00	0.25	2.55
Zone 5 - Other	0.00	0.00	0.00	0.00	1.36	0.00	0.07	1.44
Zone 6 - St. Clears	0.00	0.00	0.00	0.00	0.00	1.81	0.10	1.91
Zone 6 - Whitland	0.00	0.00	0.00	0.00	0.11	2.67	0.15	2.92
Zone 6 - Other	0.00	0.00	0.00	0.00	0.00	0.14	0.01	0.14
Carmarthenshire sub-total	**45.28**	**60.46**	**45.84**	**18.04**	**8.69**	**10.80**	**21.04**	**210.15**
Brecon	0.00	0.00	0.00	0.00	0.16	0.00		0.16
Cardiff	0.88	4.04	0.84	0.36	0.00	0.99		7.12
Cardigan	0.15	0.00	0.00	0.11	2.09	0.00		2.35
Haverfordwest	0.00	0.00	0.00	0.00	0.00	0.53		0.53
Lampeter	0.00	0.00	0.00	0.65	1.78	0.00		2.43
Swansea	0.73	18.84	6.39	1.01	0.33	0.00		27.30
Other	1.91	2.67	7.24	2.19	5.13	7.14		26.28
Other sub-total	**3.67**	**25.54**	**14.48**	**4.31**	**9.50**	**8.66**		**66.16**
TOTAL	**48.95**	**86.01**	**60.32**	**22.35**	**18.19**	**19.46**		**276.32**

Source: Tables 3 and 4

Table 7 - Future 2032 food/beverage expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2032	**51.58**	**90.93**	**63.84**	**23.62**	**19.14**	**20.65**		**269.76**
Zone 1 - Carmarthen	45.75	6.82	9.32	2.06	3.81	5.95	8.19	81.89
Zone 1 - Other	0.15	0.00	0.38	0.00	0.11	0.00	0.03	0.69
Zone 2 - Llanelli	0.57	40.01	7.09	0.83	0.00	0.00	8.56	57.04
Zone 2 - Burry Port	0.00	9.18	0.00	0.00	0.00	0.06	0.49	9.73
Zone 2 - Kidwelly	0.00	3.46	0.00	0.00	0.00	0.00	0.18	3.64
Zone 2 -Other	0.00	3.09	0.51	0.00	0.00	0.00	0.19	3.79
Zone 3 - Ammanford	0.67	0.64	15.45	0.47	0.00	0.00	1.91	19.14
Zone 3 - Cross Hands	0.00	0.36	3.83	0.00	0.00	0.00	0.47	4.66
Zone 3 - Other	0.00	0.36	7.28	0.24	0.34	0.00	0.43	8.66
Zone 4 - Llandeilo	0.52	0.00	4.66	8.95	0.11	0.35	0.77	15.36
Zone 4 - Llandovery	0.05	0.00	0.00	5.98	0.80	0.21	0.37	7.41
Zone 4 - Other	0.00	0.00	0.00	0.54	0.00	0.00	0.03	0.57
Zone 5 - Newcastle Emlyn	0.00	0.00	0.00	0.00	2.41	0.00	0.27	2.68
Zone 5 - Other	0.00	0.00	0.00	0.00	1.44	0.00	0.08	1.51
Zone 6 - St. Clears	0.00	0.00	0.00	0.00	0.00	1.92	0.10	2.02
Zone 6 - Whitland	0.00	0.00	0.00	0.00	0.11	2.83	0.15	3.10
Zone 6 - Other	0.00	0.00	0.00	0.00	0.00	0.14	0.01	0.15
Carmarthenshire sub-total	**47.71**	**63.92**	**48.52**	**19.07**	**9.15**	**11.46**	**22.23**	**222.05**
Brecon	0.00	0.00	0.00	0.00	0.17	0.00		0.17
Cardiff	0.93	4.27	0.89	0.38	0.00	1.05		7.53
Cardigan	0.15	0.00	0.00	0.12	2.20	0.00		2.47
Haverfordwest	0.00	0.00	0.00	0.00	0.00	0.56		0.56
Lampeter	0.00	0.00	0.00	0.69	1.88	0.00		2.56
Swansea	0.77	19.91	6.77	1.06	0.34	0.00		28.86
Other	2.01	2.82	7.66	2.32	5.40	7.58		27.78
Other sub-total	**3.87**	**27.01**	**15.32**	**4.56**	**9.99**	**9.19**		**69.93**
TOTAL	**51.58**	**90.93**	**63.84**	**23.62**	**19.14**	**20.65**		**291.98**

Source: Tables 3 and 4

Table 8 - Future 2037 food/beverage expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2037	**54.24**	**95.98**	**67.48**	**24.89**	**20.03**	**21.75**		**284.38**
Zone 1 - Carmarthen	48.11	7.20	9.85	2.17	3.99	6.26	8.62	86.20
Zone 1 - Other	0.16	0.00	0.40	0.00	0.12	0.00	0.04	0.72
Zone 2 - Llanelli	0.60	42.23	7.49	0.87	0.00	0.00	9.03	60.22
Zone 2 - Burry Port	0.00	9.69	0.00	0.00	0.00	0.07	0.51	10.27
Zone 2 - Kidwelly	0.00	3.65	0.00	0.00	0.00	0.00	0.19	3.84
Zone 2 -Other	0.00	3.26	0.54	0.00	0.00	0.00	0.20	4.00
Zone 3 - Ammanford	0.71	0.67	16.33	0.50	0.00	0.00	2.02	20.23
Zone 3 - Cross Hands	0.00	0.38	4.05	0.00	0.00	0.00	0.49	4.93
Zone 3 - Other	0.00	0.38	7.69	0.25	0.36	0.00	0.46	9.14
Zone 4 - Llandeilo	0.54	0.00	4.93	9.44	0.12	0.37	0.81	16.20
Zone 4 - Llandovery	0.05	0.00	0.00	6.30	0.84	0.22	0.39	7.80
Zone 4 - Other	0.00	0.00	0.00	0.57	0.00	0.00	0.03	0.60
Zone 5 - Newcastle Emlyn	0.00	0.00	0.00	0.00	2.52	0.00	0.28	2.80
Zone 5 - Other	0.00	0.00	0.00	0.00	1.50	0.00	0.08	1.58
Zone 6 - St. Clears	0.00	0.00	0.00	0.00	0.00	2.02	0.11	2.13
Zone 6 - Whitland	0.00	0.00	0.00	0.00	0.12	2.98	0.16	3.26
Zone 6 - Other	0.00	0.00	0.00	0.00	0.00	0.15	0.01	0.16
Carmarthenshire sub-total	**50.17**	**67.47**	**51.29**	**20.09**	**9.58**	**12.07**	**23.44**	**234.10**
Brecon	0.00	0.00	0.00	0.00	0.18	0.00		0.18
Cardiff	0.98	4.51	0.94	0.40	0.00	1.11		7.94
Cardigan	0.16	0.00	0.00	0.12	2.30	0.00		2.59
Haverfordwest	0.00	0.00	0.00	0.00	0.00	0.59		0.59
Lampeter	0.00	0.00	0.00	0.72	1.96	0.00		2.69
Swansea	0.81	21.02	7.15	1.12	0.36	0.00		30.47
Other	2.12	2.98	8.10	2.44	5.65	7.98		29.26
Other sub-total	**4.07**	**28.50**	**16.20**	**4.80**	**10.46**	**9.68**		**73.71**
TOTAL	**54.24**	**95.98**	**67.48**	**24.89**	**20.03**	**21.75**		**307.81**

Source: Tables 3 and 4

Table 9 - Food and beverage floorspace in Carmarthenshire

		Gross floorspace (sq.m)
Zone 1	Carmarthen town centre	9,532
	Carmarthen retail parks	2,300
	Sub Total	**11,832**
Zone 2	Llanelli town centre	7,214
	Llanelli retail parks	3,897
	Sub-Total	**11,111**
Zone 2	Burry Port town centre	2,223
	Kidwelly	1,468
	Sub-Total	**3,691**
Zone 3	Ammanford town centre	3,634
	Cross Hands	2,107
	Sub-Total	**5,741**
Zone 4	Llandeilo town centre	834
	Llandovery town centre	2,175
	Sub-Total	**3,009**
Zone 5	Newcastle Emlyn town centre	**1,803**
Zone 6	St Clears town centre	1,178
	Whitlands town centre	852
	Sub-Total	**2,030**
TOTAL		**39,217**

Source: *Carmarthenshire Council's Land Use Survey 2022 and Valuation Office Agency.*

Table 10 - Summary of food/beverage expenditure 2022 to 2037 (£M)

Destination	2022	2027	2032	2037
Available expenditure				
Zone 1 - Carmarthen	72.82	77.61	81.89	86.20
Zone 1 - Other	0.61	0.65	0.69	0.72
Zone 2 - Llanelli	50.57	53.95	57.04	60.22
Zone 2 - Burry Port	8.63	9.21	9.73	10.27
Zone 2 - Kidwelly	3.23	3.44	3.64	3.84
Zone 2 -Other	3.36	3.59	3.79	4.00
Zone 3 - Ammanford	16.93	18.09	19.14	20.23
Zone 3 - Cross Hands	4.12	4.40	4.66	4.93
Zone 3 - Other	7.66	8.18	8.66	9.14
Zone 4 - Llandeilo	13.63	14.53	15.36	16.20
Zone 4 - Llandovery	6.58	7.01	7.41	7.80
Zone 4 - Other	0.51	0.54	0.57	0.60
Zone 5 - Newcastle Emlyn	2.38	2.55	2.68	2.80
Zone 5 - Other	1.34	1.44	1.51	1.58
Zone 6 - St. Clears	1.79	1.91	2.02	2.13
Zone 6 - Whitland	2.74	2.92	3.10	3.26
Zone 6 - Other	0.13	0.14	0.15	0.16
Total	**197.02**	**210.15**	**222.05**	**234.10**
Turnover of existing facilities				
Zone 1 - Carmarthen	72.82	74.65	76.54	78.47
Zone 1 - Other	0.61	0.62	0.64	0.66
Zone 2 - Llanelli	50.57	51.84	53.15	54.50
Zone 2 - Burry Port	8.63	8.85	9.07	9.30
Zone 2 - Kidwelly	3.23	3.31	3.39	3.48
Zone 2 -Other	3.36	3.45	3.53	3.62
Zone 3 - Ammanford	16.93	17.36	17.80	18.25
Zone 3 - Cross Hands	4.12	4.23	4.33	4.44
Zone 3 - Other	7.66	7.85	8.05	8.25
Zone 4 - Llandeilo	13.63	13.97	14.33	14.69
Zone 4 - Llandovery	6.58	6.75	6.92	7.09
Zone 4 - Other	0.51	0.52	0.53	0.55
Zone 5 - Newcastle Emlyn	2.38	2.44	2.50	2.56
Zone 5 - Other	1.34	1.38	1.41	1.45
Zone 6 - St. Clears	1.79	1.83	1.88	1.93
Zone 6 - Whitland	2.74	2.81	2.88	2.95
Zone 6 - Other	0.13	0.14	0.14	0.15
Total	**197.02**	**202.00**	**207.10**	**212.33**
Surplus/deficit expenditure £M				
Zone 1 - Carmarthen	0.00	2.95	5.35	7.73
Zone 1 - Other	0.00	0.03	0.05	0.07
Zone 2 - Llanelli	0.00	2.11	3.89	5.73
Zone 2 - Burry Port	0.00	0.36	0.66	0.97
Zone 2 - Kidwelly	0.00	0.13	0.25	0.36
Zone 2 -Other	0.00	0.14	0.26	0.38
Zone 3 - Ammanford	0.00	0.73	1.34	1.98
Zone 3 - Cross Hands	0.00	0.18	0.33	0.48
Zone 3 - Other	0.00	0.33	0.61	0.89
Zone 4 - Llandeilo	0.00	0.56	1.04	1.51
Zone 4 - Llandovery	0.00	0.26	0.49	0.71
Zone 4 - Other	0.00	0.02	0.04	0.05
Zone 5 - Newcastle Emlyn	0.00	0.11	0.18	0.24
Zone 5 - Other	0.00	0.06	0.10	0.14
Zone 6 - St. Clears	0.00	0.07	0.14	0.20
Zone 6 - Whitland	0.00	0.11	0.22	0.31
Zone 6 - Other	0.00	0.01	0.01	0.02
Total	**0.00**	**8.15**	**14.95**	**21.77**

Source: Tables 5 to 8

Table 11 - Food/beverage floorspace capacity up to 2037

	2022	2027	2032	2037
Turnover density new floorspace (£ per sq.m)	£5,000	£5,126	£5,256	£5,388
Floorspace projection (sq.m gross)				
Zone 1 - Carmarthen	0	576	1,019	1,434
Zone 1 - Other	0	5	9	13
Zone 2 - Llanelli	0	411	741	1,063
Zone 2 - Burry Port	0	70	126	180
Zone 2 - Kidwelly	0	26	47	67
Zone 2 -Other	0	27	49	71
Zone 3 - Ammanford	0	142	256	367
Zone 3 - Cross Hands	0	35	63	90
Zone 3 - Other	0	65	116	166
Zone 4 - Llandeilo	0	108	197	281
Zone 4 - Llandovery	0	51	93	131
Zone 4 - Other	0	4	7	10
Zone 5 - Newcastle Emlyn	0	21	34	45
Zone 5 - Other	0	12	19	25
Zone 6 - St. Clears	0	14	27	38
Zone 6 - Whitland	0	22	41	57
Zone 6 - Other	0	1	2	3
Total	**0**	**1,591**	**2,845**	**4,041**

Source: Table 10

Celebrating

60

years

Birmingham
0121 713 1530
birmingham@lichfields.uk

Bristol
0117 403 1980
bristol@lichfields.uk

Cardiff
029 2043 5880
cardiff@lichfields.uk

Edinburgh
0131 285 0670
edinburgh@lichfields.uk

Leeds
0113 397 1397
leeds@lichfields.uk

London
020 7837 4477
london@lichfields.uk

Manchester
0161 837 6130
manchester@lichfields.uk

Newcastle
0191 261 5685
newcastle@lichfields.uk

Thames Valley
0118 334 1920
thamesvalley@lichfields.uk

@LichfieldsUK

lichfields.uk