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Planning. Design. Economics.



Carmarthenshire County Council Retail Study Update 2015

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1.0 **Introduction**

Scope and Purpose of Report

- 1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by Carmarthenshire County Council (CCC) to prepare a Retail Study in 2009 as part of the evidence base for the Carmarthenshire LDP. The LDP was adopted by CCC in 2014. As part of the annual monitoring of the LDP, NLP is now commissioned by CCC to provide an updated Retail Study, with particular emphasis on an updated assessment of quantitative need for retail floorspace during the remainder of the LDP period.
- 1.2 This Retail Study Update therefore provides an up to date assessment of retail needs within the County and supersedes the assessment of need and floorspace recommendations set out in the 2009 Study.
- 1.3 Section 2 of this report summarises recent relevant changes to the retail capacity assessments and outlines retail trends. Section 3 updates the retail capacity and quantitative need assessment. Section 4 reviews the Retail Strategy, and Section 5 provides the recommendations and conclusions.

2.0 **Recent Changes and Trends**

Introduction

- 2.1 The 2009 Retail Study provided projections up to 2021. The projections need to be updated in line with the latest population data from the 2011 Census and Welsh Government (WG) projections. Local expenditure data and growth projections also need to be reviewed, along with company average benchmark turnover figures. New commitments have to be taken into account, and changes to shopping patterns examined through new empirical evidence. All of these changes need to be considered in the context of recent retail trends.

Retail Trends

- 2.2 It is important to consider changes in the retail sector nationally and the implications for Carmarthenshire.
- 2.3 The economic downturn had a significant impact on the retail sector. A number of national operators have failed (e.g. Blockbuster, Comet, HMV, JJB Sports, Jessop's, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. A number of these retailers had units within the principal retail centres in Carmarthenshire.
- 2.4 Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth and have reviewed their portfolio and growth strategies, with analysts warning that store closures would be the only way the 'Big 4' would be able to grow profits again.
- 2.5 Tesco recently announced that it was closing its Home Plus store format, and also closing a further 37 stores, although none are in Carmarthenshire.
- 2.6 Sainsbury's has also reviewed its store opening programme and has pulled out of some of its planned store commitments in South Wales, including Haverfordwest in Pembrokeshire.
- 2.7 Morrison's has announced the closure of 10 loss making stores this year and has scaled back its expansion of its main store format.
- 2.8 Assessing future expenditure levels within this retail update needs to take into account the impact of the economic downturn and the likely pace of recovery. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the study period. This study takes a long term view of growth and projections, recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.

2.9 An overview of national trends within the retail sector is set out below.

Expenditure Growth

2.10 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the economic downturn was longer and deeper than would have been assumed in the 2009 Study and the delayed recovery is expected to lead to slower growth in the short term.

2.11 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The economic downturn and current forecasts suggests that past rates of growth are unlikely to be achieved in the short term (next 5 years), but the underlying trend over the medium (5 to 10 years) and long terms (beyond 10 years) is expected to pick up again.

2.12 Within Carmarthenshire, expenditure per person on convenience goods has reduced between 2007 (the base data of the 2009 Study) and 2013 (the latest data available), however, the growth rate between 2016 and 2021 is now estimated to be at a higher rate than was assumed in the 2009 Study.

2.13 Comparison goods expenditure per person has also fallen in real terms between 2007 and 2013, and this will impact upon the turnover of existing shops as well as the forecasts for future floorspace requirements.

New Forms of Retailing

2.14 New forms of retailing (multi-channel shopping) have continued to grow, as an alternative to more traditional shopping. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect shopping has become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to have an effect on retailing in the high street and from traditional stores.

2.15 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure (about 12% of all retail expenditure). Recent national trends suggest continued strong growth in this sector. Experian's Retail Planning Note 12.1 (Oct 2014) states:

“Non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 52.7 million internet users in the UK (representing 84.1% of the population) in mid-year 2012 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our forecast has the SFT share of total retail sales reaching 18.5% by 2020 rising to 20.3% by the mid-2030s.”

2.16

This retail update makes an allowance for future growth in e-tailing based on Experian’s latest projections, which is greater for both convenience and comparison goods than was assumed in the 2009 Study. However, the implications on the demand for retail space need to be carefully considered. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace.

3.0 **Retail Capacity**

Introduction

3.1 This section assesses the quantitative scope for new retail floorspace in Carmarthenshire up to 2021. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison goods shopping.

3.2 All monetary values expressed in this analysis are at 2013 prices unless stated otherwise. The previous 2009 Study was based on 2007 prices and therefore the figures are not directly comparable, particularly for convenience goods figures, where inflation has been significant.

Methodology and Data

3.3 The quantitative analysis is based on a study area that covers the whole of Carmarthenshire as defined in the 2009 Retail Study, as shown in Appendix 1.

Consumer Expenditure

3.4 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population.

3.5 Experian's latest (2014) local consumer expenditure estimates for comparison and convenience goods for the study area have been obtained.

3.6 Experian's latest EBS (Experian Business Strategies) national expenditure information has been used to forecast expenditure within the study area. Experian's forecast growth rates suggest convenience goods expenditure will decrease slightly during 2014, but will grow in 2015. In the longer term, an average growth rate of 0.6% per annum for convenience goods is predicted.

3.7 Experian's forecast growth rates suggest comparison goods expenditure will increase on average by 3.3% per annum.

3.8 The EBS growth rates reflect the likely rate of recovery from the economic downturn, with lower growth up to 2015. The longer term growth rates for comparison goods are lower than projections based on past trend lines, but in our view are more realistic and sustainable.

3.9 Expenditure projections per person are shown in Table 2 in Appendix 2 and 3.

Population

3.10 Experian now provides 2011 Census based population figures, which have been adopted in this update. The 2009 study was based on data from the 2001 Census and therefore less accurate.

- 3.11 In order to be consistent with the LDP and its evidence base, the Council's 'Scenario 3' population growth rates have been used. The population projection at 2021 in the study area is 237,734.

Available Spending

- 3.12 The levels of available spending are derived by combining the population in Table 1 with per capita spending figures in Table 2 for convenience goods in Appendix 2 and comparison goods in Appendix 3.
- 3.13 For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.
- 3.14 "Special Forms of Trading" (SFT) and non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace.
- 3.15 Experian provide projections for e-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace. Experian's projections separate e-tailing through retail and non-retail businesses. Retail businesses are operators whose sales are predominantly through traditional shops/stores, but they may also offer a home shopping/delivery or click and collect service (e.g. Argos, Tesco, Next and John Lewis). Non-retail businesses are companies whose sales are predominantly through mail order/home deliver, where growth in their sales is unlikely to affect the demand for traditional retail space. Only expenditure attributed to these non-retail businesses should be excluded from the retail capacity analysis.
- 3.16 Based on Experian data, SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is projected at 3.1% and 13.2% of total convenience and comparison goods expenditure respectively in 2016.
- 3.17 The latest projections provided by Experian suggest that these percentages will increase to 5.0% and 15.9% by 2021. The sales density figures used to access retail floorspace capacity in this report are inclusive of SFT through retail businesses. In order to reflect this growth, we have assumed the turnover efficiency of retail businesses will increase in real terms, reducing the need for new floorspace.
- 3.18 As a consequence of growth in population and per capita spending (retail businesses only), baseline convenience goods spending within the study area is forecast to increase by 7.5% from £348.51 million in 2016 to £374.59 million in 2021, as shown in Table 3 in Appendix 2.

- 3.19 Baseline comparison goods spending is forecast to increase by 20.5% from £471.66 million in 2016 to £568.40 million in 2021, as shown in Table 3 in Appendix 3.

Existing Spending Patterns 2015

- 3.20 A new household survey was undertaken by NEMS Market Research in June 2015 on behalf of CCC. A total of 1,000 households were surveyed across the County. The Study Area is divided into nine sub-zones to allow for local analysis. Respondents were asked questions about their food and non-food shopping habits. The survey results are analysed and interpreted in order to provide a composite market share for both convenience and comparison goods locations.

Convenience Shopping

- 3.21 Base year 2015 food and grocery market shares are shown in Table 4 in Appendix 2.
- 3.22 When comparing these results to the 2008 survey, one of the main differences is that the 'discount retailers', particularly Aldi, have significantly increased their market share, and in some instances, are now out-performing the larger main foodstores. For example, in Zone 1, Aldi now attract 26% of the zone's convenience goods expenditure, up from 4% in 2008/9, whilst Tesco's market share in the same zone has fallen from 41% to 28%.
- 3.23 In terms of self-containment for food shopping within each zone, this has remained broadly unchanged, although Llandeilo and Llandovery have lost market share and are now less self-sufficient in food retailing than in 2008 (44% compared to 50% in 2008/9). Conversely, the popularity of Aldi, has increased Zone 5's (Cross Hands) retention rate from 32% to 51%. The opening of the Lidl store in Ammanford, has also increased retention in Zone 3 from 53% to 64%. Despite extending their store in Ammanford, Tesco's market share in Zone 3 has actually fallen from 36% to 29% since 2008/9.
- 3.24 Table 5 in Appendix 2 indicates that the level of convenience goods expenditure attracted to shops/stores in the Study Area in 2016 is estimated to be £352.13 million.
- 3.25 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Mintel (2015). Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 7 in Appendix 2, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

- 3.26 Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 7 in Appendix 2, for consistency with the use of goods based expenditure figures.
- 3.27 Average sales densities are not widely available for smaller convenience shops, particularly independent retailers. An average sales density of £3,500 per sq m has been adopted for small convenience shops. The total benchmark turnover of existing convenience sales floorspace within the Study Area is £399.63m, as shown in Table 7 in Appendix 2.
- 3.28 These figures suggest that collectively convenience retail facilities in the centres are trading below national average levels, although there are variances between zones.
- 3.29 Where stores are trading at a level above expected company average turnover (over-trading), this can be an indication that there is a qualitative need for additional floorspace. The only stores that appear to be trading significantly above company average are the 'discount retailers', particularly the Aldi stores in Carmarthen, Llanelli and Cross Hands, and the Lidl in Ammanford.

Comparison Goods Shopping

- 3.30 Base year 2015 comparison goods market shares are shown in Table 4 in Appendix 3.
- 3.31 The Study Area is set to attract £499.98 million of comparison goods expenditure in total in 2016 based on existing market shares, as shown in Table 5 Appendix 3.
- 3.32 Company average sales densities are only available for a selection of multiple retailers. Available information indicates that the sales densities amongst comparison retailers vary significantly. There is limited information available for independent retailers.
- 3.33 Based on this expenditure estimate, the average sales density for existing comparison sales floorspace in the main retail centres in the County (excluding builders merchants) is £3,191 per sq m net as set out below. This is at the mid-low end of the range that can be achieved in town centres.
- 3.34 The analysis of existing comparison shopping patterns in 2016 suggests the following average sales density figures for the centres in the County shown in Table 3.1 overleaf.
- 3.35 Table 3.1 indicates that trading levels amongst comparison facilities in the County vary significantly from area to area. The average sales density figures should be viewed in the context of the type of floorspace in each area. Comparison facilities in Parc Trostre are far higher than Llanelli town centre, and higher than Carmarthen town centre, and skew the County average somewhat. If the Parc Trostre figures were excluded, the County average would be only £2,730 per sq m.

Table 3.1: Defined Centres Comparison Average Sales Densities (2013 prices)

Centre	Average Sales Density 2016 (£ per sq.m net)
Carmarthen	£3,543
Llanelli	£3,007
Parc Trostre	£5,139
Parc Pemberton	£2,455
Ammanford	£2,813
Llandeilo	£1,970
Cross Hands	£916
Kidwelly	£1,741
Burry Port	£2,467
St Clears	£1,795
County Average	£3,191 per sq m

- 3.36 The turnover densities have altered noticeably from the 2009 Retail Study. For example, at that time Llanelli town centre was estimated to have a turnover density of £4,912 per sq m (adjusted to 2013 prices), whereas Parc Trostre had a turnover density of £3,995 per sq m.
- 3.37 Overall, comparison shopping facilities within the County appear to be trading satisfactorily. There is no evidence of 'over-trading' in any part of the County.

Quantitative Capacity for Convenience Floorspace

Constant Market Shares

- 3.38 The total level of convenience goods expenditure attracted to shops in the Study Area between 2016 and 2021 (excluding Zone 7 and Pontarddulais) which lies outside the County boundary) is summarised in Table 8 (Appendix 2).
- 3.39 Table 8 (Appendix 2) subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development in the County during the Plan period. Within the County, there is a deficit of convenience goods expenditure in 2016, as a number of centres are trading at below benchmark levels.
- 3.40 However, for individual centres, the figures vary considerably, with some centres showing a negative requirement for additional floorspace during the plan period and some showing demand. This is addressed in the next section.

Adjusted Market Shares

- 3.41 Table 10 (Appendix 2) estimates adjusted market shares at 2021 on the basis of the existing commitments in Cross Hands West (8,375 sq m gross), Newcastle Emlyn, Castle Motors (1,397 sq m gross Lidl store) and Newcastle Emlyn, Tanyard Lane (1,426 sq m gross). It is understood that some initial works are underway at the Castle Motors site, however work on the other two commitments has yet to commence and there is some uncertainty regarding Sainsbury's commitment to the Cross Hands site following the review of their store openings (discussed earlier).
- 3.42 The commitments have been added into the benchmark turnover for Zones 5 and 8. These adjustments have then been reflected in Table 12 (Appendix 2) which summarises the requirement for net additional floorspace during the Plan period.

Qualitative Need for Convenience Goods Floorspace

- 3.43 Even though there may not be a strong quantitative case for growth, the local authority should still consider whether there is a qualitative need to plan for more convenience floorspace within the County.
- 3.44 Existing convenience provision is limited in Llandeilo, Llandovery, Newcastle Emlyn, Whitland and St Clears.
- 3.45 Of these, Newcastle Emlyn is considered to be the most isolated, and the settlement that could benefit the most from improved convenience goods provision. There are two existing commitments for new food stores in Newcastle Emlyn with a combined gross floor of circa 2,800 sq m gross, which would improve the local qualitative offer and reduce leakage of expenditure particularly to Carmarthen.

Quantitative Capacity for Comparison Floorspace

- 3.46 The household survey suggests that the County's retention of comparison goods expenditure is lower than for convenience goods. The lower level of comparison goods expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, particularly Swansea and Cardiff.
- 3.47 Future improvements to comparison retail provision within the County could help to claw back some additional expenditure leakage from the study area. However major developments in neighbouring authorities will limit the ability of shopping facilities in the County to increase their market share of expenditure. An appropriate strategy for Carmarthenshire should be to maintain existing 2015 market share in the face of increasing future competition, whilst maintaining the vitality and viability of centres.
- 3.48 The retail capacity projections in this report assume centres within Carmarthenshire can maintain their market share of comparison goods expenditure in the future.

- 3.49 This Study takes into account the recent commitment at Parc Trostre, which reduces capacity in Llanelli for the remainder of the LDP period.
- 3.50 Available comparison goods expenditure has been projected forward to 2021 based on 2015 penetration rates (i.e. assuming that comparison retail facilities will maintain their current market share) in Tables 5 and 6 in Appendix 3, and summarised in Table 7. Total comparison goods expenditure in the Study Area is expected to increase from £499.98 million in 2016 to £602.56 million in 2021.
- 3.51 Future available expenditure is compared with the projected turnover of existing comparison retail facilities within the County in order to provide estimates of surplus expenditure, as shown in Table 7 (Appendix 3). As demonstrated in Table 3.1, none of the centres are considered to have overly high benchmark turnovers, and treating existing turnover densities as the equilibrium level for future needs going forward is appropriate.
- 3.52 In the longer term existing floorspace within the County is expected to increase its benchmark turnover in real terms. A growth rate of 2% per annum is adopted, which we believe is realistic if an expenditure growth rate of 3.3% per annum is achieved. Trends indicate historically that comparison retailers will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.
- 3.53 Population and expenditure growth will result in a comparison goods expenditure surplus in all town centres during the Plan period, however, if the status quo of market shares is maintained, the majority of the growth is focused in Carmarthen and Llanelli. The consequences of this are addressed in the next section.
- 3.54 Overall, the floorspace projections in this Study Update are significantly lower for comparison goods than those in the 2009 study due to the impact of the economic downturn.

4.0 **Strategy for Accommodating Growth**

4.1 Having assessed which centres will have quantitative expenditure capacity to accommodate new retail floorspace, this Section considers how that quantitative need could be addressed through the LDP and/or development management process.

Floorspace Projections

4.2 The floorspace projections below assume that new shopping facilities within Carmarthenshire can maintain their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections;
- the effect of Internet/home shopping on the demand for retail property;
- the level of operator demand for floorspace in Carmarthenshire;
- the likelihood that Carmarthenshire's existing market share of expenditure will change in the future in the face of increasing competition;
- qualitative deficiencies in certain centres; and
- the potential impact new development may have on existing centres.

4.3 Projections up to 2021 are realistic and are based on up to date forecasts, which take into account the effects of the recession. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce.

4.4 For these reasons we recommend that any LDP Review should not look to make any retail allocations which are based on quantitative capacity established for beyond 2021.

4.5 The quantitative and qualitative assessment of the potential capacity for new retail floorspace within the previous sections suggests that there is some scope for new retail development within Carmarthenshire within certain town centres. This section examines the requirements and opportunities for accommodating growth.

4.6 These projections relate to Class A1 retail uses only. There may be scope for a further 20% floorspace that can be occupied by Class A2 to A3 uses and Class A1 non-retail services, and this is included in Table 4.1 below.

Accommodating Future Growth

- 4.7 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development. In considering this important issue the following factors should be assessed:
- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
 - Is the nature and scale of development likely to serve a wide catchment area e.g. a large part of Carmarthenshire?
 - Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
 - If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?
- 4.8 All development should be appropriate in terms of scale and nature to the centre in which it is located.

Retail Hierarchy and Growth Strategy

- 4.9 The LDP reinforces the role of the principal centres including Carmarthen, Llanelli and Ammanford/Cross Hands in serving wider catchment areas for comparison goods, but also promotes smaller centres in their role of providing local communities with a satisfactory range of high street facilities and services particularly convenience goods.
- 4.10 Where quantitative capacity is shown for convenience goods floorspace in particular, it is important to consider where the best location to accommodate the need is.
- 4.11 Convenience shopping is undertaken on a regular basis (on average 1.2 times a week for main food shopping). In line with the LDP strategy of providing satisfactory access for local communities to convenience goods, a redistribution of expenditure growth rather than maintaining the status quo of the existing retail hierarchy may be appropriate. For example, Carmarthen retains a very high proportion (96%) of the Zone 1 expenditure, but also attracts almost as much expenditure again from the rest of the Study Area. Some of this inflow of expenditure may be better accommodated by directing growth back to the area from which it originated, through the development of new stores.
- 4.12 However, once existing commitments are taken into account, there is expected to be a deficit in convenience goods floorspace capacity by 2021 across the County as a whole, with only Carmarthen and Newcastle Emlyn with surplus capacity. Whilst some of the Carmarthen surplus could be redistributed to reduce leakage from the smaller settlements, the scope to improve convenience goods provision in the lower order settlements is limited, although individual applications in these centres should still be considered on their merits.

- 4.13 In terms of Comparison goods, both Carmarthen and Llanelli/Parc Trostre retain reasonable levels of expenditure in the face of competition from higher order centres in the sub region such as Swansea and Cardiff.
- 4.14 Cross Hands and Ammanford, however, do not have such a strong retail function in terms of comparison goods, and as Principal Centres, this could be improved, although this would result in redistribution of growth from Carmarthen and/or Llanelli.

Utilising the Existing Stock

- 4.15 The existing stock of premises will have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing comparison goods retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 2% per annum is assumed after 2013 in line with the expenditure growth rate of 3.3% per annum. The adoption of these growth rates represents a balanced approach. No growth in convenience turnover efficiency is assumed, due to low growth and past trends. The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.
- 4.16 Llanelli town centre has a vacancy rate of 17% in terms of units, although only 13% in terms of floorspace (Source: Goad). Nonetheless, the 10,560 sq m of existing vacant floorspace could reduce to 5,000 sq m (6%) and therefore 5,560 sq m of vacant floorspace could be reoccupied as part of a strategy to accommodate future growth.
- 4.17 The vacancy rate in Carmarthen is 10.8% by unit and 7% by floorspace (Source: Goad). Again, we recommend that the amount of vacant floorspace could be reduced to 5,000 sq m (6%) Carmarthen and therefore 930 sq m of vacant floorspace could be reoccupied as part of a strategy to accommodate future growth.
- 4.18 In Ammanford, the vacancy rate is 8% by unit and 6% by floorspace (source: Goad). We consider that there is only limited scope for this vacancy rate to be reduced by accommodating future growth, given that some vacancy level is appropriate to allow for churn of premises.
- 4.19 Llandeilo has a vacancy rate of 10% by unit and 7.4% by floorspace (source: Goad). If the amount of vacant floorspace (530 sq m) was reduced to 6% of floorspace, 100 sq m of vacant floorspace could be reoccupied as part of a strategy to accommodate future growth.
- 4.20 If this reduction in vacant units can be achieved then the overall retail floorspace projection up to 2021 would reduce. Table 4.1 below summarises the floorspace requirements by centre taking into account the inclusion of A2 and A3 space and a reduction in vacancy rates. These projections take account of existing commitments, but do not seek to further alter the existing market shares.

Table 4.1: Floorspace requirements by centre, 2021 (sq.m gross)

Centre	A1 Conv	A1 Comp	A2-A3	Vacant	Total
Carmarthen	724	4,866	1,169	-930	5,829
Llanelli/Parc Trostre/ Pemberton Retail Park		2,835	567	-5,560	0
Ammanford		651	130	-	781
Llandeilo/Llandovery		240	48	-100	188
Cross Hands		497	99	-	596
Newcastle Emlyn		328	91	-	419
Whitland/St Clears		158	32	-	190
Burry Port/Kidwelly		78	16	-	94

- 4.21 The short term priority post-recession should be the reoccupation of vacant floorspace, but this should not preclude investment within appropriate town and village retail centre locations.
- 4.22 However, there may be difficulties in seeking to reoccupy vacant units that are listed buildings or located within a conservation area due to associated overheads. Older properties are less efficient in terms of their layout than modern retail units. The Council may wish to introduce measures to assist with the reoccupation of vacant units, which may include shop improvement grants or discounted business rates, potentially subsidised by s.106 Agreements associated with new retail developments.

5.0 **Conclusions**

5.1 This report provides an update of the County wide needs assessment for retail development in Carmarthenshire during the LDP period. There have been a number of changes that have affected the retail floorspace capacity projections, lower expenditure growth during the recession, lower forecast future growth in expenditure and proportionally higher expenditure via special forms of trading. These changes have been assessed and the principal conclusions of the analysis contained within this study are summarised below..

Convenience Goods

5.2 Shopping habits in Carmarthenshire appear to have altered in the last 6 years with consumers switching from the large format stores of the 'big four' national retailers, to the smaller stores of the deep discounters Aldi and Lidl.

5.3 In quantitative terms there is adequate provision across the county for convenience goods floorspace, however given the significant trade currently attracted to the discount retailers, there may be scope for these existing stores to be extended or new discount stores in areas where there is limited existing provision.

5.4 There is some identified capacity in Carmarthen; however, since there is good qualitative provision already in the town, this capacity might be better served by being directed back to its point of origin.

5.5 Existing commitments in Cross Hands and Newcastle Emlyn are likely to meet the quantitative need in these areas.

Comparison Goods

5.6 Expenditure projections for comparison goods have reduced since the 2009 study.

5.7 There will be floorspace requirements for comparison goods in all of the Principal and smaller centres.

5.8 If the existing status quo is maintained, Carmarthen will have the greatest capacity for further retail development. Much of Llanelli's growth can be accommodated through the reoccupation of vacant floorspace and existing commitments. Cross Hands and Ammanford are lower down the retail hierarchy than the other Principal Centres of Carmarthen and Llanelli, and it would be acceptable to direct some of the capacity in Carmarthen to either of these centres.

Appendix 1 Study Area and Existing Provision

KEY

Carmarthenshire County Boundary - - -

Existing Foodstores

Large Foodstores - 2,500+ sqm net sales area

1. Morrisons, Parc Pensarn
2. Tesco Extra, Carmarthen
3. Asda, Llanelli
4. Morrisons, Parc Pemberton
5. Tesco Extra, Parc Trostre
6. Tesco, Ammanford

Medium Foodstores - 1,300-2,499sqm net sales area

7. Tesco, Pontarddulais
8. Co-op, Lampeter
9. Co-op, Cross Hands

Small Foodstores - <1,300sqm net sales area

10. Co-op - Pontarddulais
11. Co-op - Burry Port
12. Co-op - Llanello
13. C.K. Supermarket - Newcastle Emlyn
14. Somerfield - Newcastle Emlyn
15. Co-op - Whitland
16. Spar - St Clears
17. Aldi - Stephens Way
18. Lidl - Carmarthen
19. Marks and Spencer - Carmarthen
20. Aldi - Llanelli
21. Marks & Spencer - Parc Trostre
22. Co-op - Ammanford
23. Co-op - Kidwelly
24. Aldi - Cross Hands
25. C.K. Supermarket - Llanello
26. Co-op - Llanelidery
27. Sainsbury's - Lampeter
28. Lidl, Machynys Link Road
29. Lidl, Ammanford

nlp Nathaniel Lichfield and Partners

Project Carmarthenshire Retail Study

Title **Plan 2**
Plan showing main foodstores in study area

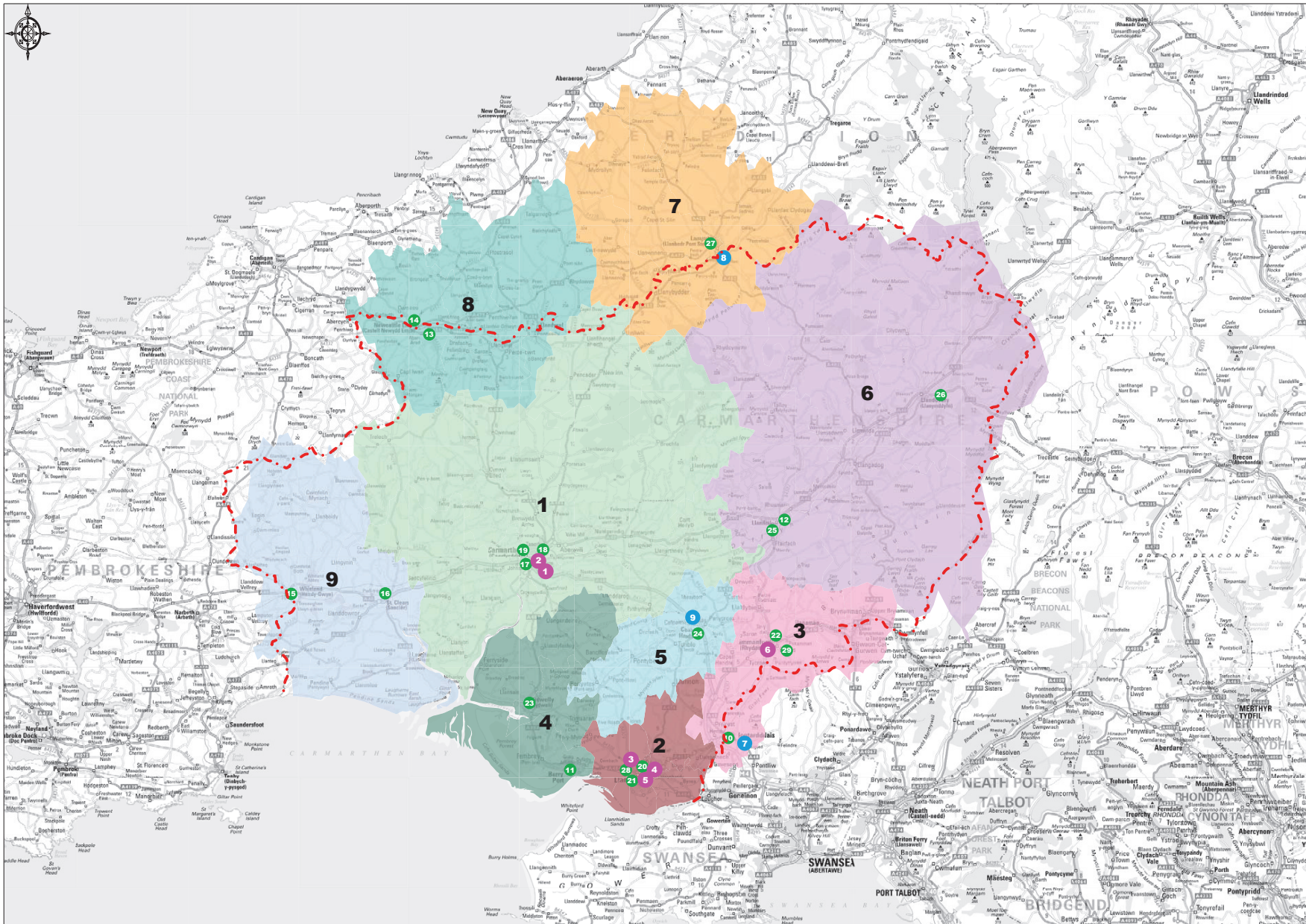
Client Carmarthenshire County Council

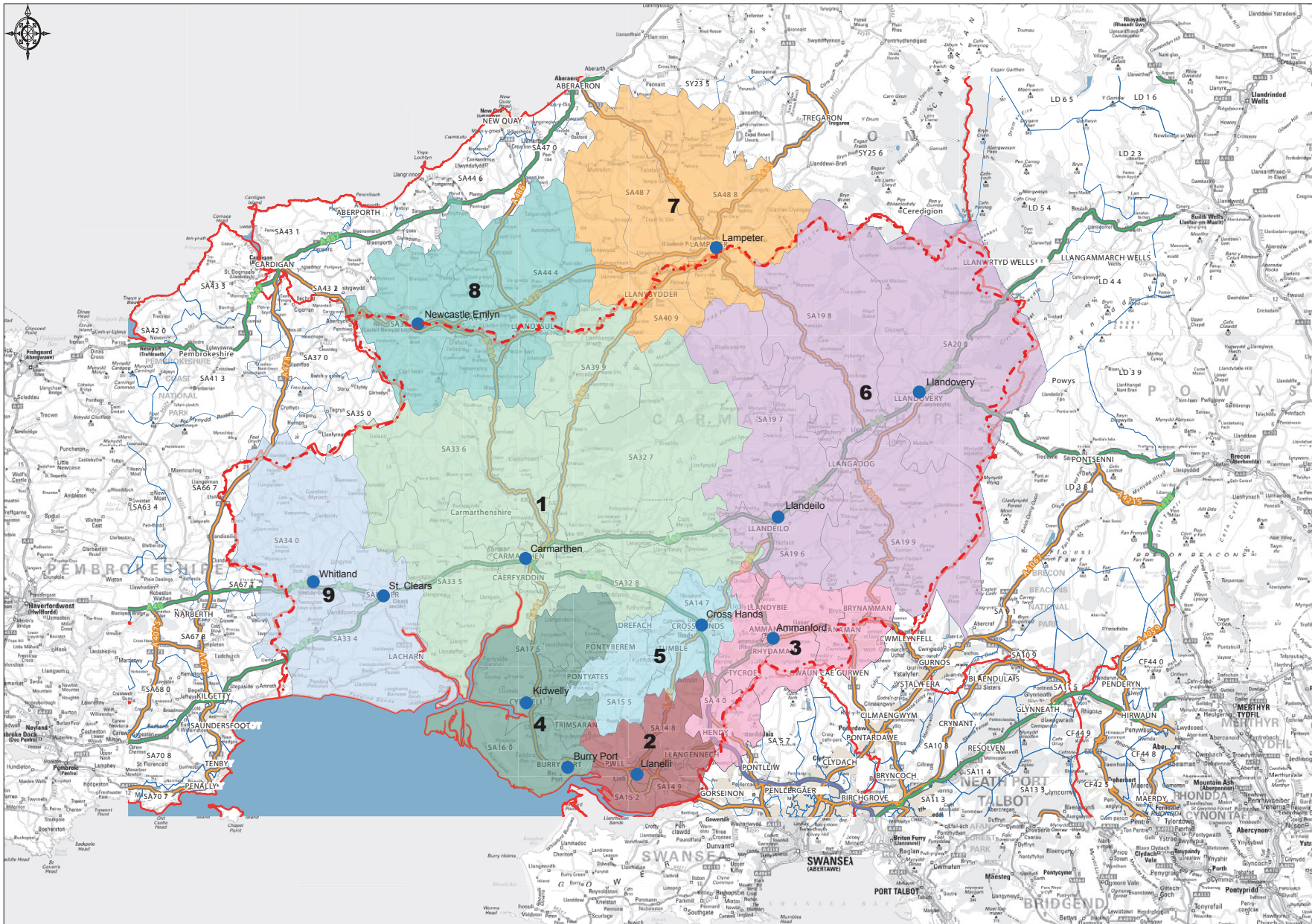
Date September 2015

Scale NTS

Drawn by SV

Drp. No IL31263_02





KEY

- Carmarthenshire County Boundary ---
- Zone 1 - Carmarthen 1
- Zone 2 - Llanelli 2
- Zone 3 - Ammanford 3
- Zone 4 - Burry Port 4
- Zone 5 - Cross Hands 5
- Zone 6 - Llandeilo & Llandovery 6
- Zone 7 - Lampeter 7
- Study Area Zones - Post Code Areas 8

Zone	Description	Post Code Areas
1	Carmarthen Town and surrounding rural area	SA31 1 SA31 2 SA31 3 SA33 6 SA32 7 SA32 8 SA39 9
2	Llanelli area	SA15 1 SA15 2 SA15 3 SA15 4 SA14 8 SA14 9
3	Ammanford and Pontardulais	SA4 0 SA4 8 SA18 1 SA18 2 SA18 3
4	Burry Port and Kidwelly	SA17 4 SA17 5 SA18 0
5	Cross Hands	SA14 6 SA14 7 SA15 5
6	Llandeilo, Llandovery and rural north east of county	SA19 6 SA19 7 SA19 8 SA19 9 SA20 0
7	Lampeter	SA40 9 SA48 7 SA48 8 SA38 9 SA44 4 SA44 5 SA33 4 SA34 0
8	Newcastle Emlyn	SA31 1 SA31 2 SA31 3 SA33 6 SA32 7 SA32 8 SA39 9



Project Carmarthenshire Retail Study

Title **Plan 1**
Plan showing study area zones

Client Carmarthenshire County Council

Date September 2015

Scale NTS

Drawn by SV

Drp. No IL31263_01



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Appendix 2 Quantitative Assessment of Convenience Goods

Table 1: Population Projections

Zone	2011	2016	2021
1 - Carmarthen Town and surrounding rural area	34,383	36,536	38,630
2 - Llanelli area	51,412	54,631	57,762
3 - Ammanford and Pontarddulais	39,540	42,015	44,424
4 - Burry Port and Kidwelly	17,661	18,767	19,842
5 - Cross Hands	19,246	20,451	21,623
6 - Llandeilo, Llandovery and rural north east	13,211	14,038	14,843
7 - Lampeter	12,312	13,083	13,833
8 - Newcastle Emlyn	13,259	14,089	14,897
9 - St Clear and Whitland	10,575	11,237	11,881
Study Area Total:	211,599	224,846	237,734

Source: Census 2011 (Experian MMG3)

Table 2: Convenience Retail Expenditure Per Capita (2013 Prices)

Zones	2016 ³	2021 ³
1	£1,666	£1,694
2	£1,417	£1,441
3	£1,482	£1,506
4	£1,562	£1,588
5	£1,548	£1,573
6	£1,724	£1,752
7	£1,583	£1,609
8	£1,673	£1,701
9	£1,647	£1,674

Source: Experian MMG3 with adjustments made using the following: Expenditure growth rates from Figure 1a - Briefing note 12 October 2014, SFT growth rates from Appendix 3 - Briefing note 12 October 2014

Table 3: Total Convenience Retail Expenditure (2013 Prices) - Baseline Population

Zones	2016 £M	2021 £M
1	£60.87	£65.44
2	£77.41	£83.24
3	£62.27	£66.90
4	£29.31	£31.51
5	£31.66	£34.01
6	£24.20	£26.00
7	£20.71	£22.26
8	£23.57	£25.34
9	£18.51	£19.89
Catchment Area Total:	£348.51	£374.59

Source: Table 1 and Table 2 above

Table 4: Estimated Convenience Shopping Penetration Rates 2015

Store/Destination										Inflow
	1	2	3	4	5	6	7	8	9	
Zone 1										
Aldi, Carmarthen	26%	0%	5%	3%	2%	4%	9%	13%	21%	5%
Lidl, Carmarthen	10%	0%	0%	1%	1%	3%	1%	5%	6%	5%
Marks and Spencer, Carmarthen	7%	0%	0%	1%	0%	2%	1%	2%	3%	5%
Morrisons, Parc Pensarn	20%	0%	1%	7%	7%	4%	3%	4%	15%	5%
Tesco Extra, Carmarthen	28%	0%	0%	1%	3%	9%	6%	13%	20%	5%
Other local food stores	5%	0%	0%	2%	2%	2%	3%	2%	4%	0%
Zone 1 sub-total	96%	0%	6%	15%	15%	24%	23%	39%	69%	n/a
Zone 2										
Asda, Llanelli	0%	25%	3%	13%	4%	0%	5%	0%	0%	10%
Morrisons, Parc Pemberton	0%	21%	1%	14%	5%	0%	0%	0%	0%	10%
Tescos Extra, Parc Trostre	0%	20%	1%	15%	7%	0%	0%	0%	0%	10%
Lidl, Llanelli	0%	6%	1%	5%	1%	0%	0%	0%	0%	5%
Aldi, Llanelli	0%	11%	2%	11%	3%	0%	0%	0%	1%	5%
Other local food stores	0%	14%	1%	3%	3%	0%	0%	0%	0%	5%
Zone 2 sub-total	0%	97%	9%	61%	23%	0%	5%	0%	1%	n/a
Zone 3										
Tesco, Ammanford	0%	0%	29%	0%	7%	3%	0%	0%	1%	10%
Lidl, Ammanford	0%	0%	18%	0%	1%	2%	0%	0%	0%	5%
Tesco, Pontarddulais	0%	0%	5%	0%	0%	1%	0%	0%	0%	5%
Other local food stores	0%	0%	12%	0%	1%	0%	0%	0%	0%	5%
Zone 3 sub-total	0%	0%	64%	0%	9%	6%	0%	0%	1%	n/a
Zone 4										
Co-op, Burry Port	0%	1%	0%	9%	0%	1%	0%	0%	0%	0%
Co-op, Kidwelly	0%	0%	1%	11%	0%	0%	0%	0%	0%	0%
Other local food stores	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%
Zone 4 sub-total	0%	1%	1%	23%	0%	1%	0%	0%	0%	n/a
Zone 5										
Co-op, Cross Hands	0%	0%	1%	0%	13%	1%	0%	0%	0%	5%
Aldi, Cross Hands	0%	0%	9%	1%	31%	13%	0%	0%	1%	5%
Other local food stores	0%	0%	1%	0%	7%	0%	0%	1%	0%	5%
Zone 5 sub-total	0%	0%	11%	1%	51%	14%	0%	1%	1%	n/a
Zone 6										
Co-op, Llandeilo	0%	0%	0%	0%	0%	17%	0%	0%	0%	5%
Co-op, Llandovery	0%	0%	0%	0%	0%	17%	0%	0%	0%	5%
Other local food stores	0%	0%	0%	0%	0%	10%	0%	0%	0%	5%
Zone 6 sub-total	0%	0%	0%	0%	0%	44%	0%	0%	0%	n/a
Zone 7										
Co-op, Lampeter	0%	0%	0%	0%	0%	4%	20%	1%	0%	5%
Sainsburys, Lampeter	0%	0%	0%	0%	0%	2%	30%	2%	0%	5%
Other local food stores	0%	0%	0%	0%	0%	1%	12%	0%	0%	5%
Zone 7 sub-total	0%	0%	0%	0%	0%	7%	62%	3%	0%	n/a
Zone 8										
C.K. supermarket, Newcastle Emlyn	0%	0%	0%	0%	0%	0%	0%	6%	1%	5%
Co-op, Newcastle Emlyn	0%	0%	0%	0%	0%	0%	0%	7%	0%	5%
Other local food stores	3%	0%	0%	0%	0%	0%	0%	24%	0%	5%
Zone 8 sub-total	3%	0%	0%	0%	0%	0%	0%	37%	1%	n/a
Zone 9										
Local Shops, Whitland	0%	0%	0%	0%	0%	0%	0%	0%	10%	5%
Local Shops, St Clears	0%	0%	0%	0%	0%	0%	0%	0%	10%	5%
Other local food stores	0%	0%	0%	0%	0%	0%	0%	0%	2%	5%
Zone 9 sub-total	0%	0%	0%	0%	0%	0%	0%	0%	22%	n/a
STUDY AREA TOTAL	99%	98%	91%	100%	98%	96%	90%	80%	95%	n/a
Beyond Study Area	1%	2%	9%	0%	2%	4%	10%	20%	5%	n/a
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a

Source: Market shares derived from NEMS Household Survey results June 2015 (Questions 1, 4 and 5) – weighted 60/20/20 respectively

Table 5: Convenience Turnover in Study Area 2016

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2016 £M	£60.87	£77.41	£62.27	£29.31	£31.66	£24.20	£20.71	£23.57	£18.51		
Zone 1											
Aldi, Carmarthen	£15.83	£0.00	£3.11	£0.88	£0.63	£0.97	£1.86	£3.06	£3.89	£1.59	£31.83
Lidl, Carmarthen	£6.09	£0.00	£0.00	£0.29	£0.32	£0.73	£0.21	£1.18	£1.11	£0.52	£10.44
Marks and Spencer, Carmarthen	£4.26	£0.00	£0.00	£0.29	£0.00	£0.48	£0.21	£0.47	£0.56	£0.33	£6.60
Morrisons, Parc Pensarn	£12.17	£0.00	£0.62	£2.05	£2.22	£0.97	£0.62	£0.94	£2.78	£1.18	£23.55
Tesco Extra, Carmarthen	£17.04	£0.00	£0.00	£0.29	£0.95	£2.18	£1.24	£3.06	£3.70	£1.50	£29.97
Other local food stores	£3.04	£0.00	£0.00	£0.59	£0.63	£0.48	£0.62	£0.47	£0.74	£0.00	£6.58
Zone 1 sub-total	£58.43	£0.00	£3.74	£4.40	£4.75	£5.81	£4.76	£9.19	£12.77	£5.12	£108.97
Zone 2											
Asda, Llanelli	£0.00	£19.35	£1.87	£3.81	£1.27	£0.00	£1.04	£0.00	£0.00	£3.04	£30.37
Morrisons, Parc Pemberton	£0.00	£16.26	£0.62	£4.10	£1.58	£0.00	£0.00	£0.00	£0.00	£2.51	£25.07
Tescos Extra, Parc Trostre	£0.00	£15.48	£0.62	£4.40	£2.22	£0.00	£0.00	£0.00	£0.00	£2.52	£25.24
Lidl, Llanelli	£0.00	£4.64	£0.62	£1.47	£0.32	£0.00	£0.00	£0.00	£0.00	£0.37	£7.42
Aldi, Llanelli	£0.00	£8.52	£1.25	£3.22	£0.95	£0.00	£0.00	£0.00	£0.19	£0.00	£14.12
Other local food stores	£0.00	£10.84	£0.62	£0.88	£0.95	£0.00	£0.00	£0.00	£0.00	£0.00	£13.29
Zone 2 sub-total	£0.00	£75.09	£5.60	£17.88	£7.28	£0.00	£1.04	£0.00	£0.19	£8.44	£115.52
Zone 3											
Tesco, Ammanford	£0.00	£0.00	£18.06	£0.00	£2.22	£0.73	£0.00	£0.00	£0.19	£2.35	£23.54
Lidl, Ammanford	£0.00	£0.00	£11.21	£0.00	£0.32	£0.48	£0.00	£0.00	£0.00	£0.63	£12.64
Tesco, Pontarddulais	£0.00	£0.00	£3.11	£0.00	£0.00	£0.24	£0.00	£0.00	£0.00	£0.18	£3.53
Other local food stores	£0.00	£0.00	£7.47	£0.00	£0.32	£0.00	£0.00	£0.00	£0.00	£0.41	£8.20
Zone 3 sub-total	£0.00	£0.00	£39.85	£0.00	£2.85	£1.45	£0.00	£0.00	£0.19	£3.57	£47.91
Zone 4											
Co-op, Burry Port	£0.00	£0.77	£0.00	£2.64	£0.00	£0.24	£0.00	£0.00	£0.00	£0.00	£3.65
Co-op, Kidwelly	£0.00	£0.00	£0.62	£3.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.85
Other local food stores	£0.00	£0.00	£0.00	£0.88	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.88
Zone 4 sub-total	£0.00	£0.77	£0.62	£6.74	£0.00	£0.24	£0.00	£0.00	£0.00	£0.00	£8.38
Zone 5											
Co-op, Cross Hands	£0.00	£0.00	£0.62	£0.00	£4.12	£0.24	£0.00	£0.00	£0.00	£0.26	£5.24
Aldi, Cross Hands	£0.00	£0.00	£5.60	£0.29	£9.81	£3.15	£0.00	£0.00	£0.19	£1.00	£20.04
Other local food stores	£0.00	£0.00	£0.62	£0.00	£2.22	£0.00	£0.00	£0.24	£0.00	£0.16	£3.24
Zone 5 sub-total	£0.00	£0.00	£6.85	£0.29	£16.15	£3.39	£0.00	£0.24	£0.19	£1.43	£28.52
Zone 6											
Co-op, Llandeilo	£0.00	£0.00	£0.00	£0.00	£0.00	£4.11	£0.00	£0.00	£0.00	£0.22	£4.33
Co-op, Llandovery	£0.00	£0.00	£0.00	£0.00	£0.00	£4.11	£0.00	£0.00	£0.00	£0.22	£4.33
Other local food stores	£0.00	£0.00	£0.00	£0.00	£0.00	£2.42	£0.00	£0.00	£0.00	£0.13	£2.55
Zone 6 sub-total	£0.00	£0.00	£0.00	£0.00	£0.00	£10.65	£0.00	£0.00	£0.00	£0.56	£11.21
Zone 7											
Co-op, Lampeter	£0.00	£0.00	£0.00	£0.00	£0.00	£0.97	£4.14	£0.24	£0.00	£0.28	£5.63
Sainsburys, Lampeter	£0.00	£0.00	£0.00	£0.00	£0.00	£0.48	£6.21	£0.47	£0.00	£0.38	£7.55
Other local food stores	£0.00	£0.00	£0.00	£0.00	£0.00	£0.24	£2.49	£0.00	£0.00	£0.14	£2.87
Zone 7 sub-total	£0.00	£0.00	£0.00	£0.00	£0.00	£1.69	£12.84	£0.71	£0.00	£0.80	£16.04
Zone 8											
C.K. supermarket, Newcastle Emlyn	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.41	£0.19	£0.08	£1.68
Co-op, Newcastle Emlyn	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.65	£0.00	£0.09	£1.74
Other local food stores	£1.83	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.66	£0.00	£0.39	£7.88
Zone 8 sub-total	£1.83	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£8.72	£0.19	£0.56	£11.30
Zone 9											
Local Shops, Whitland	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.85	£0.10	£1.95
Local Shops, St Clears	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.85	£0.10	£1.95
Other local food stores	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.37	£0.02	£0.39
Zone 9 sub-total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.07	£0.21	£4.29
INSIDE CATCHMENT	£60.26	£75.86	£56.66	£29.31	£31.02	£23.23	£18.64	£18.86	£17.58	£20.70	£352.13
OUTSIDE OF CATCHMENT	£0.61	£1.55	£5.60	£0.00	£0.63	£0.97	£2.07	£4.71	£0.93	n/a	£17.07
STUDY AREA TOTAL	£60.87	£77.41	£62.27	£29.31	£31.66	£24.20	£20.71	£23.57	£18.51	n/a	£369.21

Source: Tables 3 and 4

Table 6: Convenience Turnover in Study Area 2021

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2021 £M	£65.44	£83.24	£66.90	£31.51	£34.01	£26.00	£22.26	£25.34	£19.89		
Zone 1											
Aldi, Carmarthen	£17.01	£0.00	£3.35	£0.95	£0.68	£1.04	£2.00	£3.29	£4.18	£1.71	£34.21
Lidl, Carmarthen	£6.54	£0.00	£0.00	£0.32	£0.34	£0.78	£0.22	£1.27	£1.19	£0.56	£11.22
Marks and Spencer, Carmarthen	£4.58	£0.00	£0.00	£0.32	£0.00	£0.52	£0.22	£0.51	£0.60	£0.35	£7.10
Morrisons, Parc Pensarn	£13.09	£0.00	£0.67	£2.21	£2.38	£1.04	£0.67	£1.01	£2.98	£1.27	£25.31
Tesco Extra, Carmarthen	£18.32	£0.00	£0.00	£0.32	£1.02	£2.34	£1.34	£3.29	£3.98	£1.61	£32.22
Other local food stores	£3.27	£0.00	£0.00	£0.63	£0.68	£0.52	£0.67	£0.51	£0.80	£0.00	£7.07
Zone 1 sub-total	£62.82	£0.00	£4.01	£4.73	£5.10	£6.24	£5.12	£9.88	£13.72	£5.50	£117.13
Zone 2											
Asda, Llanelli	£0.00	£20.81	£2.01	£4.10	£1.36	£0.00	£1.11	£0.00	£0.00	£3.27	£32.65
Morrisons, Parc Pemberton	£0.00	£17.48	£0.67	£4.41	£1.70	£0.00	£0.00	£0.00	£0.00	£2.70	£26.96
Tescos Extra, Parc Trostre	£0.00	£16.65	£0.67	£4.73	£2.38	£0.00	£0.00	£0.00	£0.00	£2.71	£27.14
Lidl, Llanelli	£0.00	£4.99	£0.67	£1.58	£0.34	£0.00	£0.00	£0.00	£0.00	£0.40	£7.98
Aldi, Llanelli	£0.00	£9.16	£1.34	£3.47	£1.02	£0.00	£0.00	£0.00	£0.20	£0.00	£15.18
Other local food stores	£0.00	£11.65	£0.67	£0.95	£1.02	£0.00	£0.00	£0.00	£0.00	£0.00	£14.29
Zone 2 sub-total	£0.00	£80.74	£6.02	£19.22	£7.82	£0.00	£1.11	£0.00	£0.20	£9.07	£124.19
Zone 3											
Tesco, Ammanford	£0.00	£0.00	£19.40	£0.00	£2.38	£0.78	£0.00	£0.00	£0.20	£2.53	£25.29
Lidl, Ammanford	£0.00	£0.00	£12.04	£0.00	£0.34	£0.52	£0.00	£0.00	£0.00	£0.68	£13.58
Tesco, Pontarddulais	£0.00	£0.00	£3.35	£0.00	£0.00	£0.26	£0.00	£0.00	£0.00	£0.19	£3.79
Other local food stores	£0.00	£0.00	£8.03	£0.00	£0.34	£0.00	£0.00	£0.00	£0.00	£0.44	£8.81
Zone 3 sub-total	£0.00	£0.00	£42.82	£0.00	£3.06	£1.56	£0.00	£0.00	£0.20	£3.84	£51.48
Zone 4											
Co-op, Burry Port	£0.00	£0.83	£0.00	£2.84	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£3.93
Co-op, Kidwelly	£0.00	£0.00	£0.67	£3.47	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.14
Other local food stores	£0.00	£0.00	£0.00	£0.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.95
Zone 4 sub-total	£0.00	£0.83	£0.67	£7.25	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£9.01
Zone 5											
Co-op, Cross Hands	£0.00	£0.00	£0.67	£0.00	£4.42	£0.26	£0.00	£0.00	£0.00	£0.00	£5.63
Aldi, Cross Hands	£0.00	£0.00	£6.02	£0.32	£10.54	£3.38	£0.00	£0.00	£0.20	£0.00	£20.46
Other local food stores	£0.00	£0.00	£0.67	£0.00	£2.38	£0.00	£0.00	£0.25	£0.00	£0.00	£3.30
Zone 5 sub-total	£0.00	£0.00	£7.36	£0.32	£17.35	£3.64	£0.00	£0.25	£0.20	£0.28	£29.40
Zone 6											
Co-op, Llandeilo	£0.00	£0.00	£0.00	£0.00	£0.00	£4.42	£0.00	£0.00	£0.00	£0.23	£4.65
Co-op, Llandovery	£0.00	£0.00	£0.00	£0.00	£0.00	£4.42	£0.00	£0.00	£0.00	£0.00	£4.42
Other local food stores	£0.00	£0.00	£0.00	£0.00	£0.00	£2.60	£0.00	£0.00	£0.00	£0.00	£2.60
Zone 6 sub-total	£0.00	£0.00	£0.00	£0.00	£0.00	£11.44	£0.00	£0.00	£0.00	£0.23	£11.67
Zone 7											
Co-op, Lampeter	£0.00	£0.00	£0.00	£0.00	£0.00	£1.04	£4.45	£0.25	£0.00	£0.30	£6.05
Sainsburys, Lampeter	£0.00	£0.00	£0.00	£0.00	£0.00	£0.52	£6.68	£0.51	£0.00	£0.00	£7.70
Other local food stores	£0.00	£0.00	£0.00	£0.00	£0.00	£0.26	£2.67	£0.00	£0.00	£0.00	£2.93
Zone 7 sub-total	£0.00	£0.00	£0.00	£0.00	£0.00	£1.82	£13.80	£0.76	£0.00	£0.30	£16.68
Zone 8											
C.K. Supermarket, Newcastle Emlyn	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.52	£0.20	£0.09	£1.81
Co-op, Newcastle Emlyn	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.77	£0.00	£0.00	£1.77
Other local food stores	£1.96	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.08	£0.00	£0.00	£8.04
Zone 8 sub-total	£1.96	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.38	£0.20	£0.09	£11.63
Zone 9											
Local Shops, Whitland	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.99	£0.00	£2.09
Local Shops, St Clears	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.99	£0.00	£1.99
Other local food stores	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.40	£0.00	£0.40
Zone 9 sub-total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.38	£0.00	£4.48
INSIDE CATCHMENT	£64.78	£81.57	£60.88	£31.51	£33.33	£24.96	£20.03	£20.27	£18.89	£19.32	£375.67
OUTSIDE OF CATCHMENT	£0.65	£1.66	£6.02	£0.00	£0.68	£1.04	£2.23	£5.07	£0.99	n/a	£18.35
STUDY AREA TOTAL	£65.44	£83.24	£66.90	£31.51	£34.01	£26.00	£22.26	£25.34	£19.89	n/a	£374.59

Source: Tables 3 and 4

Table 7: Convenience Floorspace and Benchmark Turnover

Zone	Settlements	Stores		Total Net Sq m	% of Conv Goods	Conv floorspace sq m	Benchmark turnover density (£ psm)	Benchmark Turnover 2015 £M
1	Carmarthen	Aldi	orc	784	65%	510	£10,356	£5.28
		Lidl	orc	1,068	75%	801	£5,408	£4.33
		Marks and Spencer	orc	582	90%	524	£10,068	£5.27
		Morrisons - Parc Pensam	orc	3,181	85%	2,704	£12,999	£35.15
		Tesco Extra	orc	5,589	57%	3,186	£11,154	£35.53
		Farmfoods	orc	411	90%	370	£3,500	£1.29
		Other local convenience stores		2,000	100%	2,000	£3,500	£7.00
		Zone Sub-total			13,615		10,094	
2	Llanelli	Aldi	orc	761	70%	533	£10,356	£5.52
		Asda	orc	4,621	62%	2,865	£16,610	£47.59
		Lidl	orc	1,027	75%	770	£5,408	£4.17
		Marks and Spencer - Parc Trostre	orc	871	90%	784	£10,068	£7.89
		Morrison - Pemberton Retail Park	orc	3,822	75%	2,867	£12,999	£37.26
		Tesco Extra- Parc Trostre	orc	7,181	55%	3,950	£11,154	£44.05
		Other local convenience shops		1,554	100%	1,554	£3,500	£5.44
		Zone Sub-total			19,837		13,322	
3	Ammanford	Co-op	orc	1,120	85%	952	£9,893	£9.42
		Tesco	orc	3,132	70%	2,192	£11,154	£24.45
		Lidl	orc	980	80%	784	£5,408	£4.24
		Other local convenience stores		271	100%	271	£3,500	£0.95
	Glanaman / Garnant	CK Supermarket (Gaun-Cae-Gurwen)	nlp	546	80%	437	£5,000	£2.18
		Local convenience stores		246	100%	246	£3,500	£0.86
	Pontarddulais	Tesco Pontarddulais	orc	2,279	70%	1,595	£11,154	£17.79
		Co-op	orc	455	85%	387	£9,893	£3.83
Zone Sub-total			9,029		6,864		£63.73	
4	Burry Port	Co-op	orc	337	85%	286	£9,893	£2.83
		All local convenience stores		267	100%	267	£3,500	£0.93
	Kidwelly	Co-op	orc	975	85%	829	£9,893	£8.20
		Other local convenience stores		354	100%	354	£3,500	£1.24
Zone Sub-total			1,933		1,736		£13.21	
5	Cross Hands	Co-op	orc	1,880	80%	1,504	£9,893	£14.88
		Aldi	orc	825	70%	578	£10,356	£5.98
		Farmfoods	orc	786	90%	707	£3,500	£2.48
		Other local convenience stores		672	100%	672	£3,500	£2.35
		Zone Sub-total			4,163		3,461	
6	Llandeilo	Co-op	orc	498	90%	448	£9,893	£4.43
		C.K. supermarket	nlp	444	80%	355	£5,000	£1.78
		Other local convenience stores		402	100%	402	£3,500	£1.41
	Llandovery	Co-op, Brecon Road	orc	740	80%	592	£9,893	£5.86
		Other local convenience stores		560	100%	560	£3,500	£1.96
Zone Sub-total			2,644		2,357		£15.43	
7	Lampeter	Co-op	orc	1,566	85%	1,331	£9,893	£13.17
		Sainsbury's	orc	1,045	85%	888	£13,692	£12.16
		Zone Sub-total			2,611		2,219	
8	Newcastle Emlyn	C.K.s Station Road	nlp	456	90%	410	£5,000	£2.05
		Co-op, Newcastle Emlyn	orc	260	85%	221	£9,893	£2.19
		All local convenience stores		430	100%	430	£3,500	£1.51
		Zone Sub-total			1,146		1,061	
9	Whitland St Clears	Co-op, Whitland	orc	192	88%	169	£9,893	£1.67
		Spar, St Clears	nlp	311	75%	233	£6,999	£1.63
		Other local food stores		406	100%	406	£3,500	£1.42
		Zone Sub-total			909		808	
Grand Total			55,887		41,924		£399.63	

1. Net floorspace estimates from ORC database

2. Benchmark turnovers from Retailer Rankings, except for C.K. Supermarket and local convenience stores which are NLP estimates

Table 8: Surplus / Deficit Expenditure within the Study Area

		2016	2021
SURPLUS/DEFICIT EXPENDITURE			
Zone 1	Aldi, Carmarthen	£26.55	£28.93
	Lidl, Carmarthen	£6.11	£6.89
	Marks and Spencer, Carmarthen	£1.33	£1.82
	Morrisons, Carmarthen	-£11.60	-£9.83
	Tesco Extra, Carmarthen	-£5.56	-£3.32
	Other local food stores	-£1.71	-£1.22
	Zone 1 Sub-total	£15.11	£23.27
Zone 2	Asda, Llanelli	-£17.22	-£14.94
	Morrisons, Parc Pemberton	-£12.19	-£10.31
	Tescos Extra, Parc Trostre	-£18.81	-£16.92
	Lidl, Llanelli	£3.26	£3.81
	Aldi, Llanelli	£8.60	£9.66
	Other local food stores	-£0.04	£0.96
	Zone 2 Sub-total	-£36.40	-£27.73
Zone 3	Tesco, Ammanford	-£0.92	£0.84
	Lidl, Ammanford	£8.40	£9.34
	Other local food stores	-£5.21	-£4.60
	Zone 3 Sub-total	£2.27	£5.58
Zone 4	Co-op, Burry Port	£0.82	£1.09
	Co-op, Kidwelly	-£4.35	-£4.06
	Other local food stores	-£1.29	-£1.23
	Zone 4 Sub-total	-£4.83	-£4.20
Zone 5	Co-op, Cross Hands	-£9.64	-£9.25
	Aldi, Cross Hands	£14.06	£14.48
	Other local food stores	-£1.59	-£1.52
	Zone 5 Sub-total	£2.84	£3.71
Zone 6	Co-op, Llandeilo	-£0.10	£0.22
	Co-op, Llandovery	-£1.53	-£1.44
	Other local food stores	-£2.60	-£2.54
	Zone 6 Sub-total	-£4.22	-£3.76
Zone 8	C.K supermarket, Newcastle Emlyn	-£0.37	-£0.24
	Co-op, Newcastle Emlyn	-£0.45	-£0.41
	Other local food stores	£6.37	£6.54
	Zone 8 Sub-total	£5.55	£5.88
Zone 9	Co-op, Whitland	£0.28	£0.42
	Spar, St Clears	£0.32	£0.36
	Other local food stores	-£1.03	-£1.02
	Zone 9 Sub-total	-£0.44	-£0.24
STUDY AREA TOTAL		-£20.12	£2.51

Source: Tables 5 and 7 above

Table 9: Convenience Turnover of Commitments

Name of Commitment	Gross Floorspace (sq m)	Net Floorspace (sq m)	Convenience Floorspace (sq m)	Benchmark turnover density (£ psm)	Benchmark Turnover 2015 £M
Cross Hands West (Sainsbury)	8,375	5,109	3,730	£13,692	£51.07
Castle Motors, Newcastle Emlyn (Lidl)	1,397	1,063	894	£5,408	£4.83
Tanyard Lane, Newcastle Emlyn	1,426	1,066	853	£10,000	£8.53

Source: Carmarthenshire Council

Table 10: Estimated Convenience Shopping Penetration Rates (adjusted to reflect commitments)

Store/Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow
Zone 1										
Aldi, Carmarthen	23%	0%	4%	3%	1%	4%	9%	7%	21%	5%
Lidl, Carmarthen	9%	0%	0%	1%	1%	3%	1%	3%	6%	5%
Marks and Spencer, Carmarthen	7%	0%	0%	1%	0%	2%	1%	2%	3%	5%
Morrisons, Parc Pensarn	19%	0%	1%	5%	5%	4%	3%	3%	15%	5%
Tesco Extra, Carmarthen	26%	0%	0%	1%	2%	9%	6%	9%	20%	5%
Other local food stores	5%	0%	0%	2%	2%	2%	3%	2%	4%	0%
Zone 1 sub-total	89%	0%	5%	13%	11%	24%	23%	26%	69%	n/a
Zone 2										
Asda, Llanelli	0%	24%	3%	13%	2%	0%	5%	0%	0%	10%
Morrisons, Parc Pemberton	0%	20%	1%	14%	3%	0%	0%	0%	0%	10%
Tescos Extra, Parc Trostre	0%	19%	1%	15%	4%	0%	0%	0%	0%	10%
Lidl, Llanelli	0%	6%	1%	5%	1%	0%	0%	0%	0%	5%
Aldi, Llanelli	0%	10%	2%	11%	2%	0%	0%	0%	1%	5%
Other local food stores	0%	13%	1%	3%	1%	0%	0%	0%	0%	5%
Zone 2 sub-total	0%	92%	9%	61%	13%	0%	5%	0%	1%	n/a
Zone 3										
Tesco, Ammanford	0%	0%	25%	0%	3%	3%	0%	0%	1%	10%
Lidl, Ammanford	0%	0%	16%	0%	1%	2%	0%	0%	0%	5%
Tesco, Pontarddulais	0%	0%	5%	0%	0%	1%	0%	0%	0%	5%
Other local food stores	0%	0%	10%	0%	1%	0%	0%	0%	0%	5%
Zone 3 sub-total	0%	0%	56%	0%	5%	6%	0%	0%	1%	n/a
Zone 4										
Co-op, Burry Port	0%	1%	0%	10%	0%	1%	0%	0%	0%	0%
Co-op, Kidwelly	0%	0%	1%	9%	0%	0%	0%	0%	0%	0%
Other local food stores	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%
Zone 4 sub-total	0%	1%	1%	22%	0%	1%	0%	0%	0%	n/a
Zone 5										
Sainsbury's Cross Hands	5%	5%	11%	3%	33%	8%	0%	0%	0%	10%
Co-op, Cross Hands	0%	0%	1%	0%	10%	1%	0%	0%	0%	5%
Aldi, Cross Hands	0%	0%	7%	1%	20%	8%	0%	0%	1%	5%
Other local food stores	0%	0%	1%	0%	7%	0%	0%	1%	0%	5%
Zone 5 sub-total	5%	5%	20%	4%	70%	17%	0%	1%	1%	n/a
Zone 6										
Co-op, Llandeilo	0%	0%	0%	0%	0%	15%	0%	0%	0%	5%
Co-op, Llandovery	0%	0%	0%	0%	0%	16%	0%	0%	0%	5%
Other local food stores	0%	0%	0%	0%	0%	10%	0%	0%	0%	5%
Zone 6 sub-total	0%	0%	0%	0%	0%	41%	0%	0%	0%	n/a
Zone 7										
Co-op, Lampeter	0%	0%	0%	0%	0%	4%	20%	1%	0%	5%
Sainsburys, Lampeter	0%	0%	0%	0%	0%	2%	30%	2%	0%	5%
Other local food stores	0%	0%	0%	0%	0%	1%	12%	0%	0%	5%
Zone 7 sub-total	0%	0%	0%	0%	0%	7%	62%	3%	0%	n/a
Zone 8										
New store, Tanyard Lane	1%	0%	0%	0%	0%	0%	0%	19%	0%	5%
New Lidl store, Castle Motors	1%	0%	0%	0%	0%	0%	0%	19%	0%	5%
C.K. supermarket, Newcastle Emlyn	0%	0%	0%	0%	0%	0%	0%	4%	1%	5%
Co-op, Newcastle Emlyn	0%	0%	0%	0%	0%	0%	0%	4%	0%	5%
Other local food stores	3%	0%	0%	0%	0%	0%	0%	14%	0%	5%
Zone 8 sub-total	5%	0%	0%	0%	0%	0%	0%	60%	1%	n/a
Zone 9										
Local Shops, Whitland	0%	0%	0%	0%	0%	0%	0%	0%	10%	5%
Local Shops, St Clears	0%	0%	0%	0%	0%	0%	0%	0%	10%	5%
Other local food stores	0%	0%	0%	0%	0%	0%	0%	0%	2%	5%
Zone 9 sub-total	0%	0%	0%	0%	0%	0%	0%	0%	22%	n/a
STUDY AREA TOTAL	99%	98%	91%	100%	99%	96%	90%	90%	95%	n/a
Beyond Study Area	1%	2%	9%	0%	1%	4%	10%	10%	5%	n/a
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a

Source: Table 4 with adjustment made to market shares made to reflect commitments at Cross Hands West and Newcastle Emlyn

Table 11: Convenience Turnover in Study Area 2021

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2021 £M	£65.44	£83.24	£66.90	£31.51	£34.01	£26.00	£22.26	£25.34	£19.89		
Zone 1											
Aldi, Carmarthen	£15.05	£0.00	£2.68	£0.95	£0.34	£1.04	£2.00	£1.77	£4.18	£1.47	£29.48
Lidl, Carmarthen	£5.89	£0.00	£0.00	£0.32	£0.34	£0.78	£0.22	£0.76	£1.19	£0.50	£10.00
Marks & Spencer, Carmarthen	£4.58	£0.00	£0.00	£0.32	£0.00	£0.52	£0.22	£0.51	£0.60	£0.35	£7.10
Morrisons, Parc Pansarn	£12.43	£0.00	£0.67	£1.58	£1.70	£1.04	£0.67	£0.76	£2.98	£1.15	£22.98
Tesco Extra, Carmarthen	£17.01	£0.00	£0.00	£0.32	£0.68	£2.34	£1.34	£2.28	£3.98	£1.47	£29.41
Other local food stores	£3.27	£0.00	£0.00	£0.63	£0.68	£0.52	£0.67	£0.51	£0.80	£0.00	£7.07
Zone 1 sub-total	£58.24	£0.00	£3.35	£4.10	£3.74	£6.24	£5.12	£6.59	£13.72	£4.95	£101.09
Zone 2											
Asda, Llanelli	£0.00	£19.98	£2.01	£4.10	£0.68	£0.00	£1.11	£0.00	£0.00	£3.10	£30.97
Morrisons, Parc Pemberton	£0.00	£16.65	£0.67	£4.41	£1.02	£0.00	£0.00	£0.00	£0.00	£2.53	£25.28
Tescos Extra, Parc Trostre	£0.00	£15.81	£0.67	£4.73	£1.36	£0.00	£0.00	£0.00	£0.00	£2.51	£25.08
Lidl, Llanelli	£0.00	£4.99	£0.67	£1.58	£0.34	£0.00	£0.00	£0.00	£0.00	£0.40	£7.98
Aldi, Llanelli	£0.00	£8.32	£1.34	£3.47	£0.68	£0.00	£0.00	£0.00	£0.20	£0.74	£14.74
Other local food stores	£0.00	£10.82	£0.67	£0.95	£0.34	£0.00	£0.00	£0.00	£0.00	£0.67	£13.45
Zone 2 sub-total	£0.00	£76.58	£6.02	£19.22	£4.42	£0.00	£1.11	£0.00	£0.20	£0.00	£107.55
Zone 3											
Tesco Ammanford	£0.00	£0.00	£16.73	£0.00	£1.02	£0.78	£0.00	£0.00	£0.20	£2.08	£20.81
Lidl, Ammanford	£0.00	£0.00	£10.70	£0.00	£0.34	£0.52	£0.00	£0.00	£0.00	£0.61	£12.17
Co-op, Pontarddulais	£0.00	£0.00	£3.35	£0.00	£0.00	£0.26	£0.00	£0.00	£0.00	£0.19	£3.79
Other local food stores	£0.00	£0.00	£6.69	£0.00	£0.34	£0.00	£0.00	£0.00	£0.00	£0.37	£7.40
Zone 3 sub-total	£0.00	£0.00	£37.47	£0.00	£1.70	£1.56	£0.00	£0.00	£0.20	£3.25	£40.92
Zone 4											
Co-op, Burry Port	£0.00	£0.83	£0.00	£3.15	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£4.24
Co-op, Kidwelly	£0.00	£0.00	£0.67	£2.84	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.50
Local food stores Zone 4	£0.00	£0.00	£0.00	£0.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.95
Zone 4 sub-total	£0.00	£0.83	£0.67	£6.93	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£8.69
Zone 5											
Sainsbury's Cross Hands	£3.27	£4.16	£7.36	£0.95	£11.22	£2.08	£0.00	£0.00	£0.00	£3.23	£32.27
Co-op, Cross Hands	£0.00	£0.00	£0.67	£0.00	£3.40	£0.26	£0.00	£0.00	£0.00	£0.23	£4.56
Aldi, Cross Hands	£0.00	£0.00	£4.68	£0.32	£6.80	£2.08	£0.00	£0.00	£0.20	£0.74	£14.82
Other local food stores	£0.00	£0.00	£0.67	£0.00	£2.38	£0.00	£0.00	£0.25	£0.00	£0.17	£3.48
Zone 5 sub-total	£3.27	£4.16	£13.38	£1.26	£23.81	£4.42	£0.00	£0.25	£0.20	£4.37	£55.13
Zone 6											
Co-op, Llandeilo	£0.00	£0.00	£0.00	£0.00	£0.00	£3.90	£0.00	£0.00	£0.00	£0.21	£4.11
Somerfield, Llandovery	£0.00	£0.00	£0.00	£0.00	£0.00	£4.16	£0.00	£0.00	£0.00	£0.22	£4.38
Other local food stores	£0.00	£0.00	£0.00	£0.00	£0.00	£2.60	£0.00	£0.00	£0.00	£0.14	£2.74
Zone 6 sub-total	£0.00	£0.00	£0.00	£0.00	£0.00	£10.66	£0.00	£0.00	£0.00	£0.56	£11.22
Zone 7											
Co-op, Lampeter	£0.00	£0.00	£0.00	£0.00	£0.00	£1.04	£4.45	£0.25	£0.00	£0.30	£6.05
Somerfield, Lampeter	£0.00	£0.00	£0.00	£0.00	£0.00	£0.52	£6.68	£0.51	£0.00	£0.41	£8.11
Other local food stores	£0.00	£0.00	£0.00	£0.00	£0.00	£0.26	£2.67	£0.00	£0.00	£0.15	£3.09
Zone 7 sub-total	£0.00	£0.00	£0.00	£0.00	£0.00	£1.82	£13.80	£0.76	£0.00	£0.86	£17.24
Zone 8											
New store, Tanyard Lane	£0.65	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.81	£0.00	£0.29	£5.76
New Lidl store, Castle Motors	£0.65	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.81	£0.00	£0.29	£5.76
C.K. supermarket, Newcastle Emlyn	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.01	£0.20	£0.06	£1.28
Somerfield, Newcastle Emlyn	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.01	£0.00	£0.05	£1.07
All stores Newcastle Emlyn	£1.96	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.55	£0.00	£0.29	£5.80
Zone 8 sub-total	£3.27	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£15.20	£0.20	£0.98	£19.66
Zone 9											
Co-op, Whitland	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.99	£0.10	£2.09
Spar, St Clears	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.99	£0.10	£2.09
All stores, Whitland	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.40	£0.02	£0.42
Zone 9 sub-total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.38	£0.23	£4.61
STUDY AREA TOTAL	£64.78	£81.57	£60.88	£31.51	£33.67	£24.96	£20.03	£22.81	£18.89	£15.20	£366.12
Other Outside Study Area	£0.65	£1.66	£6.02	£0.00	£0.34	£1.04	£2.23	£2.53	£0.99	n/a	£15.47
TOTAL STUDY AREA	£65.44	£83.24	£66.90	£31.51	£34.01	£26.00	£22.26	£25.34	£19.89	n/a	£381.59

Source: Tables 3 and 9 above

Table 12: Carmarthenshire Convenience Floorspace Projections 2016 to 2021 (£Millions) with commitments

		2016	2021
AVAILABLE EXPENDITURE			
Zone 1	Carmarthen	£108.97	£101.09
Zone 2	Llanelli/Parc Pemberton	£115.52	£107.55
Zone 3	Ammanford	£44.38	£37.13
Zone 4	Burry Port/Kidwelly	£8.38	£8.69
Zone 5	Cross Hands	£28.52	£55.13
Zone 6	Llandeilo/Llandovery	£11.21	£11.22
Zone 8	Newcastle Emlyn	£11.30	£19.66
Zone 9	Whitland/St Clears	£4.29	£4.61
CCB TOTAL		£332.56	£345.08
BENCHMARK TURNOVER EXISTING FLOORSPACE			
Zone 1	Carmarthen	£93.86	£93.86
Zone 2	Llanelli/Parc Pemberton	£151.92	£151.92
Zone 3	Ammanford	£59.90	£59.90
Zone 4	Burry Port/Kidwelly	£13.21	£13.21
Zone 5	Cross Hands	£25.69	£76.76
Zone 6	Llandeilo/Llandovery	£15.43	£15.43
Zone 8	Newcastle Emlyn	£5.74	£19.11
Zone 9	Whitland/St Clears	£4.73	£4.73
CCB TOTAL		£370.47	£434.90
SURPLUS/DEFICIT EXPENDITURE			
Zone 1	Carmarthen	£15.11	£7.24
Zone 2	Llanelli/Parc Pemberton	-£36.40	-£44.36
Zone 3	Ammanford	-£15.52	-£22.77
Zone 4	Burry Port/Kidwelly	-£4.83	-£4.51
Zone 5	Cross Hands	£2.84	-£21.63
Zone 6	Llandeilo/Llandovery	-£4.22	-£4.21
Zone 8	Newcastle Emlyn	£5.55	£0.55
Zone 9	Whitland/St Clears	-£0.44	-£0.12
CCB TOTAL		-£37.91	-£89.82

Source: Tables 5, 6, 7 and 9 above

Appendix 3 Quantitative Assessment of Comparison Goods

Table 1: Population

Zone	2011	2016	2021
1 - Carmarthen Town and surrounding rural area	34,383	36,536	38,630
2 - Llanelli area	51,412	54,631	57,762
3 - Ammanford and Pontarddulais	39,540	42,015	44,424
4 - Burry Port and Kidwelly	17,661	18,767	19,842
5 - Cross Hands	19,246	20,451	21,623
6 - Llandeilo, Llandovery and rural north east	13,211	14,038	14,843
7 - Lampeter	12,312	13,083	13,833
8 - Newcastle Emlyn	13,259	14,089	14,897
9 - St Clear and Whitland	10,575	11,237	11,881
Total	211,599	224,846	237,734

Source: Census 2011 (Experian MMG3)

Table 2: Comparison Retail Expenditure Per Capita (2013 Prices)

Zone	2016 ³	2021 ³	Growth 2016-2021
1	£2,398	£2,733	14.0%
2	£1,805	£2,058	14.0%
3	£1,949	£2,221	14.0%
4	£2,042	£2,328	14.0%
5	£2,105	£2,399	14.0%
6	£2,409	£2,746	14.0%
7	£2,226	£2,537	14.0%
8	£2,386	£2,719	14.0%
9	£2,280	£2,598	13.9%

Source: Experian MMG3 with adjustments made using the following: Expenditure growth rates from Figure 1a - Briefing note 12 October 2014, SFT growth rates from Appendix 3 - Briefing note 12 October 2014

Table 3: Total Comparison Retail Expenditure (2013 Prices)

Zone	2016	2021
1	£87.61	£105.57
2	£98.61	£118.87
3	£81.89	£98.66
4	£38.32	£46.19
5	£43.05	£51.87
6	£33.82	£40.76
7	£29.12	£35.09
8	£33.62	£40.50
9	£25.62	£30.87
Catchment Area Total	£471.66	£568.40

Sources: Table 1 and Table 2 above

Table 4: Comparison Shopping Penetration Rates 2015

Store/Destination	Zones									Inflow
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	
Zone 1										
Carmarthen Town Centre	63%	2%	9%	15%	28%	33%	28%	35%	39%	15%
Pensarn Retail Park (Carmarthen)	11%	0%	1%	6%	4%	5%	11%	10%	15%	15%
Zone 1, Other	3%	0%	3%	2%	4%	8%	1%	3%	9%	5%
Zone 1 sub-total	78%	3%	13%	23%	37%	46%	41%	48%	64%	n/a
Zone 2										
Llanelli Town Centre	0%	28%	4%	17%	11%	2%	0%	1%	0%	15%
Pemberton Retail Park, Llanelli	0%	13%	3%	8%	2%	0%	0%	0%	0%	10%
Parc Trostre (Llanelli)	3%	43%	19%	33%	23%	3%	0%	0%	1%	40%
Zone 2, Other	0%	0%	0%	0%	0%	1%	0%	0%	0%	5%
Zone 2 sub-total	3%	84%	26%	58%	36%	5%	0%	1%	1%	n/a
Zone 3										
Ammanford	0%	0%	25%	0%	2%	5%	0%	0%	0%	5%
Pontarddulais	0%	0%	2%	0%	0%	0%	0%	0%	0%	5%
Zone 3, Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Zone 3 sub-total	0%	0%	26%	0%	2%	5%	0%	0%	0%	n/a
Zone 4										
Kidwelly	0%	0%	0%	3%	0%	0%	0%	0%	0%	5%
Burry Port	0%	0%	0%	4%	0%	0%	0%	0%	0%	5%
Zone 4, Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Zone 4 sub-total	0%	0%	0%	7%	0%	0%	0%	0%	0%	n/a
Zone 5										
Cross Hands	2%	2%	6%	2%	11%	4%	1%	1%	1%	10%
Zone 5, Other	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%
Zone 5 sub-total	2%	2%	6%	2%	13%	4%	1%	1%	1%	n/a
Zone 6										
Llandeilo	1%	0%	1%	0%	0%	13%	0%	0%	0%	5%
Llandovery	0%	0%	0%	0%	0%	9%	0%	0%	0%	5%
Zone 6 Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Zone 6 sub-total	1%	0%	1%	0%	0%	22%	0%	0%	0%	n/a
Zone 7										
Lampeter	0%	0%	0%	0%	0%	6%	39%	2%	0%	10%
Zone 7, Other	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%
Zone 7 sub-total	0%	0%	0%	0%	0%	6%	40%	2%	0%	n/a
Zone 8										
Newcastle Emlyn	0%	0%	0%	0%	0%	0%	1%	23%	0%	5%
Other Zone 8	1%	0%	0%	0%	0%	0%	0%	8%	0%	5%
Zone 8 sub-total	2%	0%	0%	0%	0%	0%	1%	31%	0%	n/a
Zone 9										
St Clears	2%	0%	0%	0%	0%	0%	0%	0%	10%	5%
Whitland	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%
Zone 9, Other	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
Zone 9 sub-total	3%	0%	0%	0%	0%	0%	0%	0%	14%	n/a
STUDY AREA TOTAL	89%	89%	72%	90%	89%	89%	83%	83%	82%	n/a
Other Outside Joint Area										
Cardigan	0%	0%	0%	0%	0%	0%	0%	8%	0%	n/a
Swansea	5%	8%	24%	6%	10%	7%	5%	3%	7%	n/a
Cardiff	4%	2%	2%	3%	1%	2%	2%	3%	2%	n/a
Other	1%	1%	3%	1%	1%	2%	10%	3%	9%	n/a
Other Total	11%	11%	28%	10%	11%	11%	17%	17%	18%	n/a
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a

Source: Market shares derived from NEMS Household Survey results June 2015

Table 5: Comparison Turnover in Study Area 2016

	Zones									Inflow	Total
	1	2	3	4	5	6	7	8	9		
Expenditure 2016 £M	£87.61	£98.61	£81.89	£38.32	£43.05	£33.82	£29.12	£33.62	£25.62		
Zone 1											
Carmarthen Town Centre	£55.40	£2.12	£7.09	£5.77	£12.24	£11.26	£8.20	£11.74	£10.12	£21.87	£145.80
Pensam Retail Park (Carmarthen)	£9.67	£0.27	£0.61	£2.15	£1.75	£1.82	£3.29	£3.50	£3.97	£4.77	£31.80
Zone 1, Other	£2.91	£0.14	£2.67	£0.83	£1.77	£2.57	£0.41	£0.92	£2.28	£0.76	£15.24
Zone 1 sub-total	£67.98	£2.52	£10.36	£8.74	£15.76	£15.65	£11.90	£16.16	£16.36	£27.40	£192.84
Zone 2											
Llanelli Town Centre	£0.32	£27.29	£3.20	£6.34	£4.73	£0.59	£0.02	£0.22	£0.03	£7.54	£50.28
Pemberton Retail Park, Llanelli	£0.00	£13.30	£2.36	£2.94	£1.05	£0.12	£0.00	£0.03	£0.03	£2.20	£22.05
Parc Trostre (Llanelli)	£2.56	£42.00	£15.72	£12.83	£9.76	£0.94	£0.11	£0.00	£0.30	£56.15	£140.37
Zone 2, Other	£0.00	£0.13	£0.00	£0.00	£0.00	£0.21	£0.00	£0.00	£0.00	£0.02	£0.35
Zone 2 sub-total	£2.88	£82.72	£21.28	£22.12	£15.54	£1.85	£0.13	£0.26	£0.36	£65.91	£213.05
Zone 3											
Ammanford	£0.00	£0.15	£20.08	£0.00	£1.02	£1.52	£0.00	£0.00	£0.11	£1.20	£24.09
Pontarddulais	£0.17	£0.14	£1.33	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.09	£1.76
Zone 3, Other	£0.00	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07
Zone 3 sub-total	£0.17	£0.29	£21.48	£0.00	£1.07	£1.52	£0.00	£0.00	£0.11	£1.29	£25.92
Zone 4											
Kidwelly	£0.00	£0.07	£0.00	£1.09	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£1.22
Burry Port	£0.00	£0.06	£0.00	£1.40	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£1.53
Zone 4, Other	£0.00	£0.09	£0.00	£0.19	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.31
Zone 4 sub-total	£0.00	£0.22	£0.00	£2.67	£0.00	£0.00	£0.00	£0.04	£0.00	£0.14	£3.06
Zone 5											
Cross Hands	£2.16	£1.73	£5.13	£0.82	£4.90	£1.39	£0.24	£0.29	£0.32	£1.89	£18.87
Zone 5, Other	£0.00	£0.06	£0.00	£0.03	£0.73	£0.00	£0.00	£0.00	£0.00	£0.00	£0.82
Zone 5 sub-total	£2.16	£1.79	£5.13	£0.86	£5.62	£1.39	£0.24	£0.29	£0.32	£1.89	£19.69
Zone 6											
Llandeilo	£0.62	£0.07	£0.41	£0.00	£0.11	£4.31	£0.00	£0.03	£0.08	£0.30	£5.94
Llandovery	£0.11	£0.00	£0.00	£0.00	£0.00	£3.19	£0.03	£0.00	£0.00	£0.18	£3.51
Zone 6 Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06
Zone 6 sub-total	£0.74	£0.07	£0.41	£0.00	£0.11	£7.56	£0.03	£0.03	£0.08	£0.47	£9.51
Zone 7											
Lampeter	£0.39	£0.10	£0.00	£0.03	£0.00	£1.98	£11.37	£0.66	£0.00	£1.61	£16.15
Zone 7, Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£0.34	£0.04	£0.00	£0.00	£0.45
Zone 7 sub-total	£0.39	£0.10	£0.00	£0.03	£0.00	£2.05	£11.71	£0.69	£0.00	£1.61	£16.60
Zone 8											
Newcastle Emlyn	£0.31	£0.00	£0.00	£0.00	£0.00	£0.00	£0.19	£7.80	£0.07	£0.44	£8.81
Other Zone 8	£1.28	£0.00	£0.00	£0.03	£0.00	£0.02	£0.00	£2.67	£0.00	£0.21	£4.22
Zone 8 sub-total	£1.60	£0.00	£0.00	£0.03	£0.00	£0.02	£0.19	£10.47	£0.07	£0.65	£13.03
Zone 9											
St Clears	£2.11	£0.05	£0.00	£0.06	£0.07	£0.00	£0.00	£0.00	£2.65	£0.26	£5.21
Whitland	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.83	£0.00	£1.06
Zone 9, Other	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.13	£0.00	£0.00	£0.27
Zone 9 sub-total	£2.26	£0.28	£0.00	£0.06	£0.07	£0.00	£0.00	£0.00	£3.62	£0.00	£6.29
STUDY AREA TOTAL	£78.17	£88.00	£58.66	£34.51	£38.18	£30.05	£24.20	£27.94	£20.91	£99.37	£499.98
Other Outside Joint Area											
Cardigan	£0.13	£0.00	£0.00	£0.06	£0.00	£0.00	£0.05	£2.58	£0.09	£0.00	£2.90
Swansea	£4.56	£8.00	£19.42	£2.40	£4.19	£2.39	£1.41	£1.16	£1.75	£0.00	£45.29
Cardiff	£3.67	£1.89	£1.23	£1.15	£0.30	£0.84	£0.56	£1.01	£0.62	£0.00	£11.27
Other	£1.08	£0.72	£2.57	£0.20	£0.38	£0.54	£2.90	£0.93	£2.26	£0.00	£11.58
Other Total	£9.44	£10.61	£23.22	£3.81	£4.87	£3.77	£4.92	£5.68	£4.71	£0.00	£71.04
TOTAL STUDY AREA	£87.61	£98.61	£81.89	£38.32	£43.05	£33.82	£29.12	£33.62	£25.62	£99.37	£571.02

Source: Tables 3 and 4 above

Table 6: Comparison Turnover in Study Area 2021

	Zones									Inflow	Total
	1	2	3	4	5	6	7	8	9		
Expenditure 2021 £M	£105.57	£118.87	£98.66	£46.19	£51.87	£40.76	£35.09	£40.50	£30.87		
Zone 1											
Carmarthen Town Centre	£66.76	£2.55	£8.54	£6.95	£14.75	£13.57	£9.88	£14.14	£12.19	£26.35	£175.69
Pensarn Retail Park (Carmarthen)	£11.65	£0.32	£0.73	£2.59	£2.11	£2.20	£3.96	£4.22	£4.78	£5.75	£38.32
Zone 1, Other	£3.51	£0.17	£3.21	£1.00	£2.13	£3.10	£0.49	£1.10	£2.74	£0.92	£18.37
Zone 1 sub-total	£81.92	£3.04	£12.49	£10.54	£18.99	£18.86	£14.34	£19.47	£19.72	£33.02	£232.38
Zone 2											
Llanelli Town Centre	£0.38	£32.90	£3.86	£7.64	£5.70	£0.71	£0.02	£0.27	£0.03	£9.09	£60.61
Pemberton Retail Park, Llanelli	£0.00	£16.03	£2.85	£3.55	£1.27	£0.14	£0.00	£0.04	£0.04	£2.66	£26.57
Parc Trostre (Llanelli)	£3.08	£50.63	£18.94	£15.47	£11.76	£1.14	£0.13	£0.00	£0.36	£67.67	£169.19
Zone 2, Other	£0.00	£0.16	£0.00	£0.00	£0.00	£0.25	£0.00	£0.00	£0.00	£0.02	£0.42
Zone 2 sub-total	£3.46	£99.72	£25.64	£26.66	£18.73	£2.23	£0.16	£0.31	£0.43	£79.44	£256.79
Zone 3											
Ammanford	£0.00	£0.19	£24.19	£0.00	£1.23	£1.83	£0.00	£0.00	£0.13	£1.45	£29.03
Pontarddulais	£0.20	£0.16	£1.60	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.11	£2.12
Zone 3, Other	£0.00	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09
Zone 3 sub-total	£0.20	£0.35	£25.88	£0.00	£1.28	£1.83	£0.00	£0.00	£0.13	£1.56	£31.23
Zone 4											
Kidwelly	£0.00	£0.08	£0.00	£1.31	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£1.47
Burry Port	£0.00	£0.07	£0.00	£1.68	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£1.84
Zone 4, Other	£0.00	£0.11	£0.00	£0.22	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.38
Zone 4 sub-total	£0.00	£0.26	£0.00	£3.22	£0.00	£0.00	£0.00	£0.04	£0.00	£0.17	£3.69
Zone 5											
Cross Hands	£2.61	£2.09	£6.18	£0.99	£5.90	£1.67	£0.29	£0.35	£0.38	£2.27	£22.74
Zone 5, Other	£0.00	£0.07	£0.00	£0.04	£0.87	£0.00	£0.00	£0.00	£0.00	£0.00	£0.99
Zone 5 sub-total	£2.61	£2.16	£6.18	£1.03	£6.78	£1.67	£0.29	£0.35	£0.38	£2.27	£23.73
Zone 6											
Llandello	£0.75	£0.09	£0.49	£0.00	£0.14	£5.20	£0.00	£0.04	£0.09	£0.36	£7.16
Llandoverly	£0.14	£0.00	£0.00	£0.00	£0.00	£3.85	£0.04	£0.00	£0.00	£0.21	£4.23
Zone 6 Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07
Zone 6 sub-total	£0.89	£0.09	£0.49	£0.00	£0.14	£9.11	£0.04	£0.04	£0.09	£0.57	£11.46
Zone 7											
Lampeter	£0.47	£0.13	£0.00	£0.03	£0.00	£2.38	£13.70	£0.79	£0.00	£1.95	£19.46
Zone 7, Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£0.41	£0.04	£0.00	£0.00	£0.54
Zone 7 sub-total	£0.47	£0.13	£0.00	£0.03	£0.00	£2.47	£14.12	£0.84	£0.00	£1.95	£20.00
Zone 8											
Newcastle Emlyn	£0.37	£0.00	£0.00	£0.00	£0.00	£0.00	£0.22	£9.40	£0.08	£0.53	£10.61
Other Zone 8	£1.55	£0.00	£0.00	£0.04	£0.00	£0.03	£0.00	£3.22	£0.00	£0.25	£5.09
Zone 8 sub-total	£1.92	£0.00	£0.00	£0.04	£0.00	£0.03	£0.22	£12.62	£0.08	£0.79	£15.70
Zone 9											
St Clears	£2.55	£0.06	£0.00	£0.08	£0.09	£0.00	£0.00	£0.00	£3.19	£0.31	£6.27
Whitland	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.00	£0.00	£1.28
Zone 9, Other	£0.17	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.16	£0.00	£0.33
Zone 9 sub-total	£2.72	£0.34	£0.00	£0.08	£0.09	£0.00	£0.00	£0.00	£4.36	£0.00	£7.57
STUDY AREA TOTAL	£94.19	£106.08	£70.68	£41.60	£46.00	£36.21	£29.17	£33.66	£25.19	£119.76	£602.56
Other Outside Joint Area											
Cardigan	£0.16	£0.00	£0.00	£0.07	£0.00	£0.00	£0.06	£3.11	£0.10	£0.00	£3.50
Swansea	£5.50	£9.65	£23.40	£2.89	£5.05	£2.88	£1.70	£1.39	£2.11	£0.00	£54.58
Cardiff	£4.43	£2.27	£1.48	£1.39	£0.36	£1.01	£0.67	£1.21	£0.75	£0.00	£13.59
Other	£1.30	£0.87	£3.09	£0.25	£0.45	£0.65	£3.49	£1.12	£2.72	£0.00	£13.95
Other Total	£11.38	£12.79	£27.98	£4.60	£5.87	£4.54	£5.93	£6.84	£5.68	£0.00	£85.61
TOTAL STUDY AREA	£105.57	£118.87	£98.66	£46.19	£51.87	£40.76	£35.09	£40.50	£30.87	£119.76	£688.16

Source: Tables 3 and 4 above

Table 7: Comparison Expenditure 2016 to 2021 (£ Millions)

		2016	2021
AVAILABLE EXPENDITURE			
Zone 1	Carmarthen	£192.84	£232.38
Zone 2	Llanelli/Parc Trostre/Pemberton Retail Park	£213.05	£256.79
Zone 3	Ammanford	£25.92	£31.23
Zone 4	Burry Port / Kidwelly	£3.06	£3.69
Zone 5	Cross Hands	£19.69	£23.73
Zone 6	Llandeilo / Llandovery	£9.51	£11.46
Zone 8	Newcastle Emlyn	£13.03	£15.70
Zone 9	Whitland / St Clears	£6.29	£7.57
CCB TOTAL		£483.39	£582.56
BENCHMARK TURNOVER			
Zone 1	Carmarthen	£192.84	£212.91
Zone 2	Llanelli/Parc Trostre/Pemberton Retail Park	£213.05	£245.45
Zone 3	Ammanford	£25.92	£28.62
Zone 4	Burry Port / Kidwelly	£3.06	£3.38
Zone 5	Cross Hands	£19.69	£21.74
Zone 6	Llandeilo / Llandovery	£9.51	£10.50
Zone 8	Newcastle Emlyn	£13.03	£14.39
Zone 9	Whitland / St Clears	£6.29	£6.94
CCB TOTAL		£483.39	£543.93
SURPLUS / DEFICIT EXPENDITURE			
Zone 1	Carmarthen	£0.00	£19.47
Zone 2	Llanelli/Parc Trostre/Pemberton Retail Park	£0.00	£11.34
Zone 3	Ammanford	£0.00	£2.61
Zone 4	Burry Port / Kidwelly	£0.00	£0.31
Zone 5	Cross Hands	£0.00	£1.99
Zone 6	Llandeilo / Llandovery	£0.00	£0.96
Zone 8	Newcastle Emlyn	£0.00	£1.31
Zone 9	Whitland / St Clears	£0.00	£0.63
CCB TOTAL		£0.00	£38.63

Source: Tables 3, 4, 5 and 6 above

Appendix 4 NEMS Household Survey Results, June 2015

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Q01 At which one store do you do most of your household's main food and grocery shopping?																				
Aldi, Carmarthen	9.6%	97	31.6%	51	0.0%	0	3.9%	7	1.5%	1	2.4%	2	4.1%	3	11.2%	7	17.4%	11	29.5%	15
Aldi, Cross Hands	7.1%	71	0.0%	0	0.0%	0	12.1%	23	1.4%	1	37.9%	35	19.6%	12	0.0%	0	0.0%	0	0.7%	0
Aldi, Llanelli	4.8%	48	0.0%	0	11.9%	29	2.0%	4	12.6%	11	4.6%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Asda, Llanelli	10.3%	104	0.0%	0	29.5%	72	3.3%	6	16.7%	14	6.2%	6	0.0%	0	10.0%	6	0.0%	0	0.0%	0
Co-op, Ammanford	0.6%	6	0.0%	0	0.0%	0	3.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Bury Port	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Carmarthen	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Co-op, Cross Hands	0.7%	7	0.0%	0	0.0%	0	0.6%	1	0.6%	1	5.8%	5	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Kidwelly	0.4%	4	0.0%	0	0.0%	0	0.0%	0	4.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Lampeter	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	3	14.9%	9	1.3%	1	0.0%	0
Co-op, Llandeilo	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.1%	7	0.0%	0	0.0%	0	0.0%	0
Co-op, Llandovery	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.4%	11	0.0%	0	0.0%	0	0.0%	0
Co-op, Newcastle Emlyn	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	3	0.0%	0
Co-op, St Clears	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1
Iceland, Ammanford	0.4%	4	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Llanelli	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Carmarthen	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Farmfoods, Llanelli	0.2%	2	0.0%	0	0.4%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Ammanford	2.8%	28	0.0%	0	0.0%	0	13.7%	26	0.0%	0	1.7%	2	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Carmarthen	2.1%	21	7.1%	11	0.0%	0	0.0%	0	0.9%	1	0.0%	0	3.2%	2	0.0%	0	7.0%	5	4.7%	2
Lidl, Llanelli	1.6%	16	0.0%	0	4.2%	10	0.4%	1	5.4%	5	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer, Carmarthen	0.7%	7	2.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.1%	1	1.2%	1	1.7%	1
Marks and Spencer, Parc Trostre (Llanelli)	0.5%	5	0.0%	0	1.9%	5	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Parc Pensarn (Carmarthen)	7.1%	71	25.2%	40	0.4%	1	1.3%	3	6.8%	6	8.8%	8	3.1%	2	3.7%	2	4.4%	3	12.2%	6
Morrisons, Pemberton Retail Park (Llanelli)	8.1%	81	0.0%	0	23.8%	58	0.9%	2	18.6%	16	6.3%	6	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Ammanford	8.2%	82	0.0%	0	0.0%	0	38.5%	72	0.0%	0	8.5%	8	2.7%	2	0.0%	0	0.0%	0	0.8%	0
Tesco Extra, Carmarthen	8.4%	84	31.1%	50	0.5%	1	0.0%	0	2.2%	2	2.7%	2	9.6%	6	5.1%	3	11.3%	7	25.6%	13
Tesco Extra, Parc Trostre (Llanelli)	8.2%	83	0.0%	0	23.4%	57	1.4%	3	15.8%	13	10.5%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / home delivery	4.4%	44	1.5%	2	2.2%	5	0.0%	0	8.1%	7	1.2%	1	9.5%	6	15.9%	9	16.0%	10	5.4%	3
Aldi, Aberystwyth Road, Cardigan	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	6	1.6%	1
Aldi, Carmarthen Road, Swansea	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Station Crescent / Temple Street, Llandrindod Wells	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Belmont Road, Hereford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Asda, Heol y Mynydd, Gorseinon	0.4%	4	0.0%	0	0.0%	0	2.1%	4	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Asda, Upper Forest Way, Swansea	0.5%	5	0.0%	0	0.5%	1	2.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CK Supermarkets, Heol Nant Bran, Birchgrove, Swansea	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CK Supermarkets, Pencader Road, Pontwelly, Llandysul	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0
CK Supermarkets, Rhosmaen Street, Llandeilo	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
CK Supermarkets, Station Road, Newcastle Emlyn	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	4	0.8%	0
Co-op, Bishopston Road, Swansea	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Co-op, Glanlliedi, Felinfoel, Llanelli	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Lower Mwldan, Cardigan	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Co-op, North Road, Whitland	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2
Local shops, Aberaeron	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Local shops, Cross Hands	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Local shops, Dre-fach Felindre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Local shops, Lampeter	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Local shops, Llandeilo	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Llandovery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Llandysul	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Local shops, Llanfair	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Local shops, Llangadog	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Newcastle Emlyn	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Londis, Bridge Street, Llanybydder	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Morrisons, Great Darkgate Street, Aberystwyth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0
Sainsbury's, Brown Lennox Retail Park, Ynysangharad Road, Pontypridd	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Market Street, Lampeter	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	27.5%	16	1.3%	1	0.0%	0
Sainsbury's, Quay Parade, Swansea	0.2%	2	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Lincoln Street, Llandysul	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Tesco Superstore,	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	12.2%	8	0.8%	0

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Aberystwyth Road, Cardigan																				
Tesco Superstore, Gwyn's Drift, Pontardawe	0.8%	8	0.0%	0	0.0%	0	4.2%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Neath Abbey Road, Neath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Tidal Reach, Pontarddulais	1.2%	12	0.0%	0	0.0%	0	6.1%	11	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Wind Road, Ystradgynlais	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.4%	4	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	5.7%	3
Weighted base:	1001	160	243	187	85	92	61	59	64	51										
Sample:	1002	110	162	130	100	100	100	100	100	100										

MeanScore: visits per week

Q02 How regularly do you visit this shop to undertake your main food shopping?

Daily	1.8%	18	2.2%	4	2.1%	5	2.1%	4	0.8%	1	1.5%	1	2.4%	1	1.7%	1	0.0%	0	0.8%	0
Two times a week	10.1%	101	12.2%	20	7.5%	18	18.5%	35	5.7%	5	8.8%	8	11.5%	7	4.5%	3	4.5%	3	6.5%	3
Three times a week	3.6%	36	4.9%	8	2.6%	6	4.3%	8	4.2%	4	1.8%	2	2.6%	2	7.7%	5	3.3%	2	0.8%	0
Four times a week	0.8%	8	0.0%	0	2.0%	5	0.4%	1	0.0%	0	0.7%	1	1.8%	1	0.8%	0	0.7%	0	0.0%	0
Five times a week	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Six times a week	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a week	63.4%	635	65.4%	105	73.0%	177	61.5%	115	66.9%	57	65.1%	60	55.3%	34	39.4%	23	52.6%	34	61.3%	31
At least once a fortnight	13.9%	139	14.3%	23	9.2%	22	8.6%	16	11.7%	10	10.5%	10	21.6%	13	26.8%	16	25.7%	17	24.2%	12
At least once a month	3.7%	37	0.9%	1	1.4%	3	0.4%	1	8.4%	7	7.2%	7	3.3%	2	14.4%	9	8.6%	6	3.8%	2
At least every two months	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	1.9%	1	1.3%	1	0.0%	0
Less often	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Have only visited once	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no particular pattern)	2.1%	21	0.0%	0	1.7%	4	4.1%	8	0.6%	1	4.4%	4	1.5%	1	2.7%	2	1.2%	1	2.5%	1
Mean:	1.22	1.28	1.29	1.38	1.05	1.14	1.24	1.08	1.01	0.99										
Weighted base:	1001	160	243	187	85	92	61	59	64	51										
Sample:	1002	110	162	130	100	100	100	100	100	100										

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
MeanScore: £										
Q03 How much do you normally spend on your main food shop?										
£1 - £5	0.2%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0
£6 - £10	0.5%	5	0.0%	0	0.4%	1	0.0%	0	0.0%	0
£11 - £15	1.0%	10	0.7%	1	0.4%	1	3.0%	6	0.6%	1
£16 - £20	2.0%	20	4.3%	7	2.3%	6	3.0%	6	0.6%	1
£21 - £25	2.2%	22	4.1%	7	1.1%	3	3.4%	6	0.6%	1
£26 - £30	4.5%	45	4.9%	8	4.0%	10	4.0%	8	3.8%	3
£31 - £35	2.7%	27	1.3%	2	1.6%	4	3.7%	7	1.6%	1
£36 - £40	7.8%	78	13.6%	22	3.7%	9	6.5%	12	12.7%	11
£41 - £45	2.2%	22	3.4%	5	2.1%	5	1.9%	4	0.9%	1
£46 - £50	6.7%	67	6.6%	11	5.2%	13	10.7%	20	7.5%	6
£51 - £55	3.5%	35	4.8%	8	3.7%	9	5.5%	10	0.8%	1
£56 - £60	8.4%	84	9.0%	14	10.0%	24	9.6%	18	6.0%	5
£61 - £65	2.8%	28	3.1%	5	2.6%	6	5.7%	11	2.2%	2
£66 - £70	7.0%	71	2.3%	4	13.1%	32	2.7%	5	7.8%	7
£71 - £75	3.0%	30	3.6%	6	2.6%	6	3.6%	7	2.1%	2
£76 - £80	8.1%	81	7.3%	12	13.1%	32	3.3%	6	3.9%	3
£81 - £85	1.2%	12	2.6%	4	0.0%	0	0.0%	0	0.9%	1
£86 - £90	3.0%	30	2.6%	4	2.1%	5	4.0%	7	6.0%	5
£91 - £95	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£96 - £100	10.2%	102	3.2%	5	10.0%	24	7.8%	15	16.1%	14
£101 - £120	3.4%	34	4.9%	8	2.7%	6	3.5%	7	2.2%	2
£121 - £140	1.9%	19	0.9%	1	2.5%	6	1.0%	2	5.1%	4
£141 - £160	2.1%	21	0.9%	1	1.7%	4	0.4%	1	1.5%	1
£161 - £180	0.3%	3	0.0%	0	0.5%	1	0.0%	0	0.0%	0
£181 - £200	1.0%	10	0.0%	0	0.5%	1	0.4%	1	3.8%	3
£201 - £250	0.8%	8	0.9%	1	0.0%	0	0.0%	0	0.9%	1
£250+	0.3%	3	0.0%	0	0.0%	0	0.6%	1	0.9%	1
(Don't know / can't remember / varies)	10.7%	107	13.6%	22	11.1%	27	12.0%	22	11.2%	10
(Refused)	2.4%	24	1.1%	2	3.2%	8	3.7%	7	0.6%	1
<i>Mean:</i>	<i>71.75</i>	<i>61.83</i>	<i>72.00</i>	<i>63.22</i>	<i>82.37</i>	<i>72.37</i>	<i>70.95</i>	<i>85.52</i>	<i>79.98</i>	<i>85.54</i>
Weighted base:	1001	160	243	187	85	92	61	59	64	51
Sample:	1002	110	162	130	100	100	100	100	100	100

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Q04 Apart from (STORE MENTIONED AT Q01), is there any other one store you use regularly for your main food and grocery shopping?																				
Aldi, Carmarthen	4.9%	49	15.4%	25	0.0%	0	3.9%	7	5.5%	5	1.6%	1	6.1%	4	2.4%	1	3.2%	2	7.3%	4
Aldi, Cross Hands	2.0%	20	0.0%	0	0.0%	0	2.6%	5	0.0%	0	13.4%	12	3.0%	2	0.0%	0	0.0%	0	1.8%	1
Aldi, Llanelli	3.5%	35	0.0%	0	11.3%	27	0.0%	0	8.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Llanelli	4.1%	41	0.0%	0	10.6%	26	3.0%	6	8.8%	7	1.9%	2	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Ammanford	0.3%	3	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Bury Port	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Carmarthen	0.3%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, Cross Hands	1.1%	11	0.0%	0	0.0%	0	1.0%	2	0.0%	0	9.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Kidwelly	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Lampeter	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	16.6%	10	0.0%	0	0.0%	0
Co-op, Llandeilo	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.2%	9	0.0%	0	0.0%	0	0.0%	0
Co-op, Llandovery	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	3	0.0%	0	0.0%	0	0.0%	0
Co-op, Newcastle Emlyn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Iceland, Ammanford	0.4%	4	0.0%	0	0.0%	0	1.5%	3	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, Llanelli	1.2%	12	0.0%	0	4.6%	11	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Carmarthen	0.8%	8	1.1%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	6.6%	4	0.0%	0	4.1%	2
Farmfoods, Llanelli	2.0%	20	0.0%	0	7.4%	18	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Cross Hands	1.3%	13	0.0%	0	0.0%	0	4.3%	8	0.0%	0	5.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Ammanford	4.5%	45	0.0%	0	0.4%	1	22.4%	42	0.0%	0	1.1%	1	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Lidl, Carmarthen	2.5%	25	9.2%	15	0.5%	1	0.0%	0	0.8%	1	2.2%	2	2.5%	2	1.4%	1	1.5%	1	6.1%	3
Lidl, Llanelli	1.7%	17	0.0%	0	5.3%	13	1.5%	3	1.5%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer, Carmarthen	2.3%	23	9.5%	15	0.0%	0	1.2%	2	0.6%	1	1.1%	1	3.2%	2	0.0%	0	1.2%	1	3.1%	2
Marks and Spencer, Parc Trostre (Llanelli)	1.6%	16	0.0%	0	3.6%	9	2.1%	4	1.4%	1	1.3%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Parc Pensarn (Carmarthen)	4.4%	44	12.4%	20	0.0%	0	0.6%	1	8.2%	7	3.5%	3	5.8%	4	1.4%	1	4.4%	3	11.3%	6
Morrisons, Pemberton Retail Park (Llanelli)	3.5%	35	0.0%	0	10.5%	26	0.6%	1	6.7%	6	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Ammanford	3.7%	37	0.0%	0	0.0%	0	15.4%	29	0.0%	0	7.5%	7	3.2%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Carmarthen	5.9%	59	19.2%	31	0.0%	0	0.0%	0	0.0%	0	5.0%	5	11.2%	7	6.4%	4	14.7%	9	7.6%	4
Tesco Extra, Parc Trostre (Llanelli)	5.2%	52	0.0%	0	15.5%	38	0.0%	0	14.7%	12	2.1%	2	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Internet / home delivery	0.6%	6	0.0%	0	0.5%	1	0.6%	1	0.6%	1	1.7%	2	0.8%	1	0.0%	0	0.6%	0	0.9%	0
Aldi, Aberystwyth Road, Cardigan	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2	4.7%	3	0.0%	0
Asda, Glanyrafon, Godrergraig, Ystalyfera	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Upper Forest Way, Swansea	0.5%	5	0.0%	0	1.2%	3	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0
CK Supermarkets, Coalbrook Road, Pontyberem, Llanelli	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CK Supermarkets, Heol Cae Gurwen, Gwaun Cae	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Gurwen, Ammanford										
CK Supermarkets, Pencader Road, Pontwelly, Llandysul	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CK Supermarkets, Rhosmaen Street, Llandeilo	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CK Supermarkets, Station Road, Newcastle Emlyn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Glanlliedi, Felinfoel, Llanelli	0.2%	2	0.0%	0	0.8%	2	0.0%	0	0.0%	0
Co-op, Lower Mwdan, Cardigan	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Stephen's Way, Pensarn	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Crosshands Business Park, Heol Stanllyd, Carmarthen	0.3%	3	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Lidl, Alexandra Road, Aberystwyth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Ffordd Parc Ynysderw, Pontardawe	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Local market, Carmarthen	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0
Local market, Llanelli	0.3%	3	0.0%	0	1.2%	3	0.0%	0	0.0%	0
Local shops, Burry Port	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Cardiff	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Carmarthen	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.5%	0
Local shops, Cenarth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Cross Hands	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Dre-fach Felindre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Felinfach	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Lampeter	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Llandysul	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Llanelli	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0
Local shops, Llanfair	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Llangennech	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0
Local shops, Newcastle Emlyn	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Swansea	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Morrisons, Bridge Meadow Lane, Haverfordwest	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Great Darkgate Street, Aberystwyth	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Pentre-Chwyth, Swansea	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Nisa, Broad Street,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Llandoverly										
Nisa, Ystrad Garage, Felinfach	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier Stores, High Street, Lampeter	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Premier Stores, Masnachdy Maesygaer, Llanbydder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Sainsbury's, Alexandra Road, Gorseinon	0.3%	3	0.0%	0	1.2%	3	0.0%	0	0.0%	0
Sainsbury's, Market Street, Lampeter	0.8%	8	0.0%	0	0.0%	0	0.0%	0	11.5%	7
Sainsbury's, Quay Parade, Swansea	0.2%	2	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Tesco Extra, Fenton Trading Estate, Portfield, Haverfordwest	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Nantyffin Road, Llansamlet	1.0%	10	0.0%	0	0.0%	0	3.9%	7	0.0%	0
Tesco Superstore, Aberystwyth Road, Cardigan	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Gwyn's Drift, Pontardawe	0.2%	2	0.0%	0	0.0%	0	0.9%	2	0.0%	0
Tesco Superstore, Tidal Reach, Pontarddulais	0.7%	7	0.0%	0	0.0%	0	3.9%	7	0.0%	0
Waitrose, Birds Lane, Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0
(Don't know / varies)	0.7%	7	0.7%	1	0.4%	1	1.3%	3	0.0%	0
(Nowhere else)	29.6%	297	29.7%	47	24.0%	58	24.1%	45	32.2%	27
Weighted base:	1001	160		243	187	85	92	61	59	64
Sample:	1002	110		162	130	100	100	100	100	100

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Q05 In addition to your main food and grocery shop, where do you normally undertake 'top-up' basket shopping for food and grocery items?																				
Aldi, Carmarthen	2.7%	27	9.5%	15	0.0%	0	3.9%	7	0.9%	1	0.7%	1	0.0%	0	4.1%	2	0.8%	1	0.0%	0
Aldi, Cross Hands	2.2%	22	0.0%	0	0.0%	0	4.3%	8	0.8%	1	15.0%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Llanelli	1.1%	11	0.0%	0	2.6%	6	1.5%	3	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Llanelli	4.4%	44	0.0%	0	16.2%	39	1.1%	2	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Ammanford	0.7%	7	0.0%	0	0.0%	0	3.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Bury Port	1.7%	17	0.0%	0	0.8%	2	0.0%	0	17.7%	15	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Carmarthen	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.6%	0	0.0%	0	0.0%	0
Co-op, Cross Hands	1.8%	18	0.0%	0	0.0%	0	0.6%	1	0.0%	0	18.1%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Kidwelly	2.0%	20	0.0%	0	0.5%	1	1.5%	3	18.3%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Lampeter	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	15.9%	9	0.0%	0	0.0%	0
Co-op, Llandeilo	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.3%	7	0.0%	0	0.0%	0	0.0%	0
Co-op, Llandovery	0.7%	7	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	9.6%	6	0.0%	0	0.0%	0	0.0%	0
Co-op, Newcastle Emlyn	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	5	0.8%	0
Co-op, St Clears	1.0%	10	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.2%	9
Iceland, Ammanford	0.9%	9	0.0%	0	0.0%	0	4.5%	8	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Llanelli	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Carmarthen	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Llanelli	0.8%	8	0.0%	0	3.0%	7	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Ammanford	2.4%	24	0.0%	0	0.0%	0	12.2%	23	0.0%	0	0.5%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Carmarthen	1.5%	15	8.0%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.6%	0	0.7%	0	0.9%	0
Lidl, Llanelli	1.7%	17	0.0%	0	5.9%	14	0.0%	0	2.9%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer, Carmarthen	1.8%	18	8.3%	13	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	1	3.2%	2
Marks and Spencer, Parc Trostre (Llanelli)	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Parc Pensarn (Carmarthen)	1.7%	17	5.6%	9	0.0%	0	0.0%	0	2.1%	2	2.2%	2	0.0%	0	0.0%	0	0.0%	0	7.6%	4
Morrisons, Pemberton Retail Park (Llanelli)	3.3%	33	0.0%	0	12.2%	30	0.0%	0	3.0%	3	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Ammanford	1.7%	17	0.0%	0	0.0%	0	8.8%	16	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Tesco Extra, Carmarthen	2.4%	24	12.4%	20	0.0%	0	0.6%	1	0.0%	0	0.5%	0	0.7%	0	1.1%	1	0.6%	0	1.6%	1
Tesco Extra, Parc Trostre (Llanelli)	2.5%	25	0.0%	0	8.4%	20	0.0%	0	3.4%	3	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / home delivery	1.1%	11	3.9%	6	1.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	1.2%	1	0.9%	0
Asda, Upper Forest Way, Swansea	0.3%	3	0.0%	0	1.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CK Supermarkets, Coalbrook Road, Pontyberem, Llanelli	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CK Supermarkets, Heol Cae Gurwen, Gwaun Cae Gurwen, Ammanford	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CK Supermarkets, Pencader Road, Pontwelly, Llandysul	0.8%	8	3.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	2	0.0%	2	0.0%	0

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
CK Supermarkets, Rhosmaen Street, Llandeilo	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
CK Supermarkets, Station Road, Newcastle Emlyn	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	5	0.0%	0
Co-op, Afon Road, Llangennech	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Carmarthen Road, Kilgetty	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Co-op, Glanliedi, Felinfoel, Llanelli	1.8%	18	0.0%	0	7.5%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Llangyfelach Road, Brynhyfryd, Swansea	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, North Road, Whitland	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.9%	9
Home Bargains, Crosshands Business Park, Heol Stanllyd, Carmarthen	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Station Road, Llanelli	0.2%	2	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Stephens Way, Carmarthen	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	3	0.9%	0
Home Bargains, Ynysderw Road, Swansea	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Ffordd Parc Ynysderw, Pontardawe	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local market, Carmarthen	0.4%	4	2.0%	3	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local market, Llanelli	0.3%	3	0.0%	0	1.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Aberaeron	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Local shops, Abergavenny	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Aberystwyth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Local shops, Ammanford	1.4%	14	0.0%	0	0.0%	0	7.5%	14	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Beulah	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Local shops, Burry Port	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Capel Hendre	0.3%	3	0.0%	0	0.0%	0	0.6%	1	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Cardigan	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Local shops, Carmarthen	1.3%	13	4.5%	7	0.0%	0	0.4%	1	1.6%	1	2.7%	3	0.0%	0	1.1%	1	0.0%	0	0.7%	0
Local shops, Cenarth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Local shops, Clynderwen	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Local shops, Cross Hands	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Local shops, Crymych	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2
Local shops, Dre-fach Felindre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	5.4%	4	0.0%	0
Local shops, Efailwen, Cilymaenllwyd	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Local shops, Felinfach	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0
Local shops, Ferryside	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9								
Local shops, Furnace	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Garnant	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Glanamman	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Gwaun-Cae-Gurwen	0.2%	2	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Harford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Hendy	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Heol Y Meinciau Pontyates, Llanelli	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Kidwelly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Lampeter	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	10.9%	6	0.0%	0	0.0%	0
Local shops, Laugharne	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Local shops, Llanddarog	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Llanddewi Brefi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Local shops, Llandeilo	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Llandovery	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	4	0.0%	0	0.0%	0	0.0%	0
Local shops, Llandybie	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Llandygai, Gwynedd	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Llandysul	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	14.4%	9	0.0%	0
Local shops, Llanelli	1.6%	16	0.0%	0	6.4%	16	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Llanfair	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Local shops, Llangadog	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Llangain	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Llanybydder	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	3.8%	2	0.0%	0	0.0%	0
Local shops, Llwynhendy	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Neath	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Newcastle Emlyn	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.2%	7	0.0%	0
Local shops, Pencader	0.3%	3	1.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Pendine	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	2
Local shops, Penrhiwllan, Llandysul	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Local shops, Pontardawe	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Pontarddulais	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Pontyates	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Pontyberem	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, St. Clears	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2
Local shops, Tairgwaith	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Talgarreg	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Local shops, Tumble	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.7%	10	0.0%	0	0.0%	0	0.0%	0
Local shops, Tycroes	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Whitland	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1
Local shops, Ystrad Aeron	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Londis, Bridge Street,	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.7%	0	0.0%	0

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Llanybydder																				
Mobile fruit & veg van	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	6.0%	4	0.0%	0	0.0%	0	0.0%	0
Nisa, Broad Street, Llandoverly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Nisa, Pencader Road, Pontwelly, Llandysul	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	5.2%	3	0.0%	0
Nisa, Station Road, Newcastle Emlyn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Nisa, Ystrad Garage, Felinfach	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Premier Stores, High Street, Crickhowell	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Premier Stores, High Street, Lampeter	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Premier Stores, Lewis Street, Pontwelly	0.4%	4	2.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier Stores, Masnachdy Maesygaer, Llanbydder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Premier Stores, Station Road, Burry Port	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Albany Street, Newport	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Market Street, Lampeter	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.8%	15	0.8%	1	0.0%	0
Spar, Castle Houseblue Bear Square, St. Clears	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2
Spar, Lincoln Street, Llandysul	0.3%	3	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0
Spar, Llanboidy, Whitland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Spar, Llansteffan Road, Johnstown, Carmarthen	0.4%	4	2.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Spar, New Road, Llandeilo	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, The Avenue, Llanelli	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Aberystwyth Road, Cardigan	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Tesco Superstore, Tidal Reach, Pontarddulais	0.2%	2	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	4.0%	40	5.0%	8	3.0%	7	8.3%	15	0.6%	1	6.3%	6	0.0%	0	1.9%	1	0.6%	0	2.7%	1
(Don't do top-up food shopping)	27.4%	274	26.6%	42	25.6%	62	29.7%	55	30.6%	26	24.6%	23	48.2%	30	18.4%	11	21.9%	14	22.1%	11
Weighted base:	1001	160		243		187		85		92		61		59		64		51		
Sample:	1002	110		162		130		100		100		100		100		100		100		

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
MeanScore: visits per week																				
Q06 How regularly do you undertake basket 'top-up' shopping?																				
<i>Those who do top-up shopping at Q05:</i>																				
Daily	4.9%	35	3.0%	4	3.5%	6	6.9%	9	2.0%	1	5.8%	4	8.2%	3	4.0%	2	5.3%	3	10.0%	4
Two times a week	28.3%	206	26.1%	31	23.0%	42	28.7%	38	38.1%	22	23.1%	16	33.1%	11	31.3%	15	39.5%	20	29.8%	12
Three times a week	11.2%	82	5.2%	6	15.2%	27	2.9%	4	16.5%	10	9.1%	6	13.2%	4	26.6%	13	19.2%	10	3.8%	2
Four times a week	2.5%	18	2.7%	3	3.9%	7	1.3%	2	2.5%	1	2.3%	2	1.6%	1	0.0%	0	0.8%	0	7.1%	3
Five times a week	0.3%	2	0.0%	0	0.5%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Six times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a week	35.1%	255	48.8%	57	33.2%	60	40.0%	52	30.8%	18	30.6%	21	38.2%	12	18.8%	9	25.2%	13	30.6%	12
At least once a fortnight	8.9%	64	6.3%	7	10.2%	18	8.7%	11	3.2%	2	19.5%	13	0.0%	0	13.3%	6	4.0%	2	9.0%	4
At least once a month	2.5%	18	1.1%	1	4.4%	8	1.6%	2	2.7%	2	0.7%	0	2.6%	1	2.3%	1	1.0%	1	6.0%	2
At least every two months	0.3%	2	1.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
(Don't know / varies / no particular pattern)	6.0%	44	5.7%	7	5.7%	10	10.1%	13	3.0%	2	9.0%	6	3.0%	1	3.0%	1	3.3%	2	3.7%	1
<i>Mean:</i>		<i>1.88</i>		<i>1.61</i>		<i>1.84</i>		<i>1.83</i>		<i>1.95</i>		<i>1.80</i>		<i>2.15</i>		<i>2.03</i>		<i>2.20</i>		<i>2.15</i>
Weighted base:		727		117		181		131		59		69		32		48		50		40
Sample:		732		79		118		87		80		74		55		81		78		80

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Q07 How much do you usually spend on your basket 'top-up' shopping?																				
<i>Those who do top-up shopping at Q05:</i>																				
£1 - £5	15.6%	114	14.0%	16	17.5%	32	20.0%	26	10.7%	6	18.7%	13	13.8%	4	8.9%	4	9.5%	5	16.8%	7
£6 - £10	20.3%	147	24.1%	28	24.3%	44	18.9%	25	17.5%	10	7.5%	5	19.0%	6	13.2%	6	32.8%	17	15.3%	6
£11 - £15	13.4%	98	11.3%	13	11.0%	20	11.2%	15	14.6%	9	19.1%	13	31.3%	10	8.4%	4	14.5%	7	16.8%	7
£16 - £20	18.3%	133	13.8%	16	20.1%	36	25.4%	33	19.5%	12	10.4%	7	10.5%	3	14.4%	7	25.4%	13	13.4%	5
£21 - £25	5.4%	39	4.6%	5	1.1%	2	2.2%	3	14.3%	8	9.2%	6	3.1%	1	15.8%	8	1.7%	1	11.4%	5
£26 - £30	7.1%	52	4.3%	5	5.9%	11	8.2%	11	9.7%	6	13.3%	9	8.1%	3	9.8%	5	4.4%	2	2.0%	1
£31 - £35	1.5%	11	0.0%	0	0.5%	1	0.9%	1	0.0%	0	4.5%	3	0.0%	0	6.8%	3	1.8%	1	4.2%	2
£36 - £40	2.7%	19	3.6%	4	3.0%	5	0.0%	0	3.1%	2	6.7%	5	0.0%	0	0.7%	0	2.6%	1	4.1%	2
£41 - £45	0.3%	2	0.0%	0	0.5%	1	0.0%	0	1.2%	1	0.0%	0	1.3%	0	0.7%	0	0.0%	0	0.0%	0
£46 - £50	2.9%	21	1.1%	1	6.0%	11	0.8%	1	1.8%	1	0.8%	1	4.5%	1	7.0%	3	1.0%	1	3.0%	1
£51 - £55	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£56 - £60	0.4%	3	2.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0
£61 - £65	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
£66 - £70	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£71 - £75	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
£76 - £80	0.2%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
£81 - £85	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£86 - £90	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91 - £95	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£96 - £100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£101+	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember / varies)	8.2%	60	17.3%	20	4.7%	8	8.1%	11	6.6%	4	8.4%	6	4.3%	1	8.7%	4	3.0%	2	8.7%	3
(Refused)	3.1%	23	2.7%	3	4.9%	9	3.7%	5	0.9%	1	1.3%	1	2.2%	1	1.6%	1	3.2%	2	3.0%	1
Mean:	17.61		17.03		17.48		15.20		18.61		18.87		18.19		24.33		15.52		17.90	
Weighted base:	727		117		181		131		59		69		32		48		50		40	
Sample:	732		79		118		87		80		74		55		81		78		80	

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Q08 Now thinking about non-food shopping, in which town centre or retail park do you usually buy your family's clothing and footwear?										
Aberaeron	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ammanford	2.4%	24	0.0%	0	0.0%	0	12.3%	23	0.0%	0
Bridgend	0.2%	2	0.0%	0	0.4%	1	0.0%	0	0.0%	0
Carmarthen (town centre only)	32.0%	320	74.7%	119	1.7%	4	12.5%	23	19.7%	17
Cardiff	1.3%	13	1.7%	3	1.0%	2	1.1%	2	2.2%	2
Cross Hands	0.3%	3	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Llanelli (town centre only)	5.4%	54	0.8%	1	12.4%	30	2.9%	5	13.1%	11
Llandeilo	0.2%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Llandovery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lampeter	0.7%	7	0.0%	0	0.5%	1	0.0%	0	0.6%	1
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Newcastle Emelyn	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	8.7%	87	1.6%	2	11.8%	29	20.9%	39	3.5%	3
Parc Trostre Retail Park (Llanelli)	26.5%	265	2.2%	4	54.0%	131	26.9%	50	50.0%	42
Parc Pemberton Retail Park (Llanelli)	0.4%	4	0.0%	0	1.2%	3	0.0%	0	0.0%	0
Pensarn Retail Park (Carmarthen)	1.9%	19	0.0%	0	0.5%	1	3.9%	7	0.8%	1
Stephens Way Retail Park (Carmarthen)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue / mail order	12.0%	120	7.2%	12	9.3%	22	10.9%	20	6.0%	5
Aberystwyth	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brecon Enterprise Park, Warren Road, Brecon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bristol	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardigan	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London	0.4%	4	2.2%	3	0.0%	0	0.0%	0	0.0%	0
Clarks Village Outlet, Street, Somerset	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0
Haverfordwest	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kidwelly	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Llanybydder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Manchester	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Parc Fforestfach Retail Park, Swansea	0.2%	2	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Pontardawe	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0
St. Clears	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Morfa Lane, Carmarthen	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	1.3%	13	0.7%	1	2.1%	5	1.2%	2	3.0%	3
(Don't buy these goods)	4.2%	42	7.7%	12	3.9%	9	5.9%	11	1.2%	1

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Weighted base:	1001	160	243	187	85	92	61	59	64	51
Sample:	1002	110	162	130	100	100	100	100	100	100

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Q09 Are there any other shopping centres or locations where you buy your family's clothing and footwear? [MR]										
<i>Those who buy clothes and shoes at Q08:</i>										
Aberaeron	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ammanford	1.0%	10	0.0%	0	0.0%	0	4.0%	7	0.0%	0
Bridgend	0.4%	3	0.0%	0	0.4%	1	0.8%	1	0.0%	0
Carmarthen (town centre only)	15.1%	145	7.1%	11	10.1%	24	8.4%	15	34.2%	29
Cardiff	7.3%	70	11.6%	17	11.9%	28	2.7%	5	2.4%	2
Cross Hands	0.2%	2	0.0%	0	0.4%	1	0.0%	0	0.0%	0
Llanelli (town centre only)	3.7%	35	0.0%	0	5.1%	12	4.1%	7	7.8%	7
Llandeilo	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandoverly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lampeter	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.3%	3	1.0%	1	0.0%	0	0.6%	1	0.6%	1
Neath	0.4%	4	0.0%	0	0.5%	1	1.4%	3	0.0%	0
Newcastle Emelyn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	13.6%	130	14.6%	22	18.0%	42	15.8%	28	7.3%	6
Parc Trostre Retail Park (Llanelli)	10.8%	103	10.8%	16	15.7%	37	16.6%	29	9.2%	8
Parc Pemberton Retail Park (Llanelli)	1.8%	17	0.0%	0	4.7%	11	2.3%	4	1.5%	1
Pensarn Retail Park (Carmarthen)	1.7%	16	1.0%	1	0.0%	0	0.0%	0	2.6%	2
Stephens Way Retail Park (Carmarthen)	0.5%	5	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Internet / catalogue / mail order	4.4%	42	2.7%	4	3.9%	9	2.8%	5	5.6%	5
Aberystwyth	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arbroath	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardigan	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London	0.3%	3	1.2%	2	0.0%	0	0.0%	0	0.6%	1
Cowbridge	0.2%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Exeter	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haverfordwest	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hereford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Monmouth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parc Fforestfach Retail Park, Swansea	0.7%	7	0.7%	1	1.7%	4	0.0%	0	0.0%	0
Pontarddulais	0.5%	5	0.0%	0	0.5%	1	2.2%	4	0.0%	0
St. Clears	0.2%	2	0.0%	0	0.5%	1	0.0%	0	0.6%	1
Tumble	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
York	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	0.6%	6	1.7%	2	0.0%	0	1.6%	3	0.0%	0
(Nowhere else)	42.2%	405	55.8%	82	37.7%	88	43.6%	77	32.6%	27
Weighted base:		959		148		233		176		84
										90
										60
										58
										63
										48

by Zone

Weighted:

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Sample:	950	100	153	120	98	97	97	97	97	91

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Q10 In which town centre or retail park did you usually buy your family's furniture, furnishings and floor coverings?										
Aberaeron	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ammanford	2.2%	22	0.0%	0	0.9%	2	6.8%	13	0.0%	0
Carmarthen (town centre only)	10.8%	108	36.5%	58	1.6%	4	1.6%	3	4.5%	4
Cardiff	2.8%	28	1.7%	3	3.2%	8	1.9%	4	3.0%	3
Cross Hands	8.7%	87	2.8%	4	7.2%	18	13.9%	26	11.8%	10
Llanelli (town centre only)	3.4%	34	0.0%	0	9.2%	22	0.7%	1	7.7%	7
Llandeilo	0.4%	4	0.7%	1	0.0%	0	0.6%	1	0.0%	0
Llandovery	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lampeter	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Neath	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newcastle Emelyn	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	9.1%	91	4.4%	7	7.9%	19	17.5%	33	14.6%	12
Parc Trostre Retail Park (Llanelli)	7.7%	77	0.0%	0	21.4%	52	3.1%	6	8.8%	7
Parc Pemberton Retail Park (Llanelli)	3.1%	31	0.0%	0	9.7%	24	1.2%	2	1.2%	1
Pensarn Retail Park (Carmarthen)	2.1%	21	5.1%	8	1.2%	3	0.0%	0	0.0%	0
Stephens Way Retail Park (Carmarthen)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Internet / catalogue / mail order	12.8%	129	11.7%	19	6.7%	16	15.3%	29	8.9%	8
Aberystwyth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beulah, Ceredigion	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burry Port	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.6%	3
Cardigan	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dafen	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Dre-fach Felindre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gorseinon	0.4%	4	0.0%	0	0.7%	2	0.0%	0	0.6%	1
Haverfordwest	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandudno	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandysul	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llanegwad	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Llanidloes	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Llansaint	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Llansamlet	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Llanwrda	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parc Fforestfach Retail Park, Swansea	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Pontarddulais	0.3%	3	0.0%	0	0.0%	0	1.5%	3	0.0%	0
Pontyberem	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Pumsaint	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea Enterprise Park, Llansamlet, Swansea	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Tumble	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whitland	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Worcester	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
(Don't know / can't remember)	4.7%	47	0.8%	1	2.7%	6	9.6%	18	4.6%	4	9.0%	8	3.8%	2	5.0%	3	2.0%	1	4.7%	2
(Don't buy these goods)	26.8%	268	36.4%	58	26.0%	63	24.2%	45	28.3%	24	16.3%	15	26.3%	16	28.5%	17	30.6%	20	19.4%	10
Weighted base:	1001	160	243	187	85	92	61	59	64	51										
Sample:	1002	110	162	130	100	100	100	100	100	100										

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Q11 Are there any other shopping centres or other locations where you buy your family's furniture, furnishings and floor coverings? [MR]																				
<i>Those who buy furniture, soft furnishings or floor coverings at Q10:</i>																				
Ammanford	1.0%	8	0.0%	0	0.0%	0	4.2%	6	0.0%	0	0.7%	1	2.6%	1	0.0%	0	0.0%	0	0.0%	0
Carmarthen (town centre only)	5.3%	39	1.0%	1	2.0%	4	5.1%	7	2.1%	1	10.2%	8	14.0%	6	18.1%	8	5.8%	3	3.5%	1
Cardiff	2.6%	19	4.6%	5	0.5%	1	3.5%	5	8.0%	5	0.7%	1	4.1%	2	0.0%	0	2.1%	1	0.0%	0
Cross Hands	4.1%	30	11.1%	11	5.2%	9	1.3%	2	1.9%	1	2.8%	2	3.7%	2	2.6%	1	1.1%	0	3.4%	1
Llanelli (town centre only)	2.0%	15	0.0%	0	4.2%	8	0.0%	0	5.5%	3	4.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandeilo	0.6%	5	2.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0
Llandovery	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Lampeter	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Newcastle Emelyn	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	1.9%	1	0.0%	0
Swansea	7.8%	57	8.6%	9	6.7%	12	8.6%	12	9.9%	6	7.3%	6	10.9%	5	8.6%	4	4.0%	2	5.1%	2
Parc Trostre Retail Park (Llanelli)	2.7%	20	1.3%	1	6.2%	11	0.8%	1	3.8%	2	4.1%	3	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Parc Pemberton Retail Park (Llanelli)	1.7%	13	0.0%	0	4.4%	8	0.7%	1	5.2%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pensarn Retail Park (Carmarthen)	2.1%	15	0.0%	0	0.6%	1	0.0%	0	2.1%	1	0.7%	1	1.9%	1	1.8%	1	12.1%	5	13.3%	5
Stephens Way Retail Park (Carmarthen)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue / mail order	3.5%	25	2.8%	3	2.4%	4	2.0%	3	3.1%	2	0.8%	1	6.7%	3	3.8%	2	18.4%	8	0.0%	0
Bristol	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardigan	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.8%	0
Dre-fach Felindre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Gorseinon	0.7%	5	0.0%	0	2.3%	4	0.0%	0	1.2%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gowerton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haverfordwest	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Llandysul	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Llansamlet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Parc Fforestfach Retail Park, Swansea	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	2.9%	1
Pontarddulais	0.4%	3	0.0%	0	0.0%	0	2.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St. Clears	0.5%	4	3.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea Enterprise Park, Llansamlet, Swansea	1.0%	8	0.0%	0	4.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Welshpool	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0
Whitland	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
(Don't know / can't remember)	3.1%	23	0.0%	0	3.6%	6	4.0%	6	0.9%	1	7.4%	6	6.5%	3	0.0%	0	0.0%	0	4.2%	2
(Nowhere else)	62.3%	457	65.3%	66	60.9%	109	69.7%	99	57.9%	35	59.4%	46	46.3%	21	64.5%	27	62.4%	28	61.9%	25
Weighted base:		733		102		180		141		61		77		45		42		45		41
Sample:		678		63		115		86		73		78		71		61		56		75

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Q12 In which town centre or retail park do you usually buy your family's domestic electrical appliances e.g. fridges and kitchen items?																				
Ammanford	3.0%	30	0.0%	0	0.4%	1	13.0%	24	0.0%	0	0.0%	0	8.3%	5	0.0%	0	0.0%	0	0.0%	0
Carmarthen (town centre only)	13.2%	133	45.4%	73	0.0%	0	5.0%	9	4.4%	4	10.8%	10	18.9%	12	6.9%	4	18.2%	12	19.1%	10
Cardiff	0.4%	4	0.7%	1	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.9%	0
Cross Hands	0.9%	9	1.3%	2	0.0%	0	0.4%	1	0.0%	0	5.6%	5	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Llanelli (town centre only)	6.8%	68	0.0%	0	19.3%	47	2.0%	4	12.2%	10	5.2%	5	3.6%	2	0.0%	0	0.6%	0	0.0%	0
Llandeilo	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	4	0.0%	0	0.0%	0	0.0%	0
Llandovery	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.9%	7	0.0%	0	0.0%	0	0.0%	0
Lampeter	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	4	36.3%	21	3.1%	2	0.0%	0
Merthyr Tydfil	0.4%	4	0.0%	0	0.0%	0	1.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Newcastle Emelyn	1.4%	14	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	18.9%	12	0.0%	0
Swansea	4.4%	44	0.7%	1	0.4%	1	15.9%	30	0.8%	1	9.5%	9	0.8%	1	0.0%	0	2.0%	1	2.3%	1
Parc Trostre Retail Park (Llanelli)	12.3%	123	0.0%	0	26.8%	65	13.3%	25	24.8%	21	12.4%	11	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Parc Pemberton Retail Park (Llanelli)	8.3%	84	0.0%	0	25.8%	63	3.2%	6	11.2%	10	6.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pensarn Retail Park (Carmarthen)	5.6%	56	12.6%	20	0.0%	0	0.0%	0	8.8%	7	5.3%	5	4.2%	3	10.0%	6	8.0%	5	19.6%	10
Stephens Way Retail Park (Carmarthen)	3.1%	31	0.0%	0	0.0%	0	7.7%	14	2.1%	2	4.1%	4	6.6%	4	0.0%	0	0.0%	0	14.4%	7
Internet / catalogue / mail order	21.1%	212	15.0%	24	18.6%	45	22.2%	41	19.9%	17	26.2%	24	20.0%	12	30.2%	18	37.8%	24	11.7%	6
Aberystwyth	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	3	0.0%	0	0.0%	0
Cardigan	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Central London	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Criccieth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Crymch	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Haverfordwest	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	3.0%	2
Llandysul	0.3%	3	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Llanegwad	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Llansamlet	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llanybydder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Morfa Shopping Park, Swansea	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nantgaredig	0.4%	4	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.3%	1	0.0%	0	0.7%	0	0.0%	0
Parc Fforestfach Retail Park, Swansea	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	2.3%	1
Pontardawe	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontarddulais	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St. Clears	1.8%	18	5.4%	9	0.0%	0	0.0%	0	0.6%	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	15.6%	8
Towy Ford Retail Park, Carmarthen	0.4%	4	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	3.2%	2	0.7%	0	0.0%	0	0.0%	0
Ystradgynlais	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	1.5%	15	1.7%	3	3.4%	8	0.0%	0	1.4%	1	0.7%	1	0.0%	0	1.3%	1	0.7%	0	1.7%	1

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9	
(Don't buy these goods)	9.2%	92	12.8%	20	5.0%	12	12.8%	24	13.9%	12	12.1%	11	3.9%	2	7.0%	4	5.6%	4	6.1%	3
Weighted base:		1001		160		243		187		85		92		61		59		64		51
Sample:		1002		110		162		130		100		100		100		100		100		100

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Q13 Are there any other shopping centres or other locations where you buy your family's domestic electrical appliances? [MR]																				
<i>Those who buy domestic electrical appliances at Q12:</i>																				
Ammanford	1.1%	10	0.0%	0	0.0%	0	5.4%	9	0.0%	0	1.4%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Carmarthen (town centre only)	4.7%	43	5.6%	8	0.0%	0	2.6%	4	3.8%	3	14.1%	11	6.9%	4	7.7%	4	10.0%	6	4.5%	2
Cardiff	0.4%	4	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.9%	0
Cross Hands	0.8%	7	0.8%	1	0.9%	2	0.0%	0	0.0%	0	1.1%	1	4.4%	3	0.0%	0	0.6%	0	1.0%	0
Llanelli (town centre only)	4.1%	38	0.0%	0	12.1%	28	2.3%	4	5.9%	4	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandeilo	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Llandovery	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Lampeter	0.9%	8	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	2	10.0%	5	0.0%	0	0.0%	0
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newcastle Emelyn	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	5	0.0%	0
Swansea	2.5%	23	0.0%	0	1.7%	4	4.4%	7	7.3%	5	1.5%	1	3.2%	2	0.0%	0	0.0%	0	7.2%	3
Parc Trostre Retail Park (Llanelli)	5.6%	51	0.9%	1	12.9%	30	8.2%	13	1.7%	1	5.0%	4	2.6%	2	0.0%	0	0.0%	0	0.0%	0
Parc Pemberton Retail Park (Llanelli)	2.3%	20	0.0%	0	3.9%	9	3.0%	5	7.6%	6	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Pensarn Retail Park (Carmarthen)	3.4%	31	8.2%	11	0.0%	0	0.7%	1	3.2%	2	1.9%	1	3.3%	2	7.6%	4	8.3%	5	7.6%	4
Stephens Way Retail Park (Carmarthen)	0.3%	3	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.7%	1	0.9%	1	0.0%	0	0.6%	0	1.0%	0
Internet / catalogue / mail order	6.6%	60	7.3%	10	7.9%	18	4.1%	7	4.8%	3	3.7%	3	7.8%	5	7.8%	4	9.5%	6	8.6%	4
Aberystwyth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0
B&Q, Old Towy Sawmills, Glanyrafon Road, Carmarthen	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Cardigan	0.2%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Haverfordwest	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Kidwelly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandysul	0.3%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	1.3%	1	0.0%	0
Llangennech	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	4	0.0%	0	0.0%	0	0.0%	0
Morfa Shopping Park, Swansea	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parc Y Llyn Retail Park, Aberystwyth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Pembroke Dock	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Pontardawe	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontarddulais	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St. Clears	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
(Don't know / can't remember)	1.3%	12	2.0%	3	1.4%	3	0.7%	1	1.4%	1	0.0%	0	1.0%	1	4.9%	3	0.0%	0	1.4%	1
(Nowhere else)	65.2%	592	70.8%	99	60.3%	139	67.9%	111	65.3%	48	73.7%	59	57.0%	34	62.1%	34	62.4%	38	65.4%	31
Weighted base:		909		139		231		163		73		81		59		55		61		48
Sample:		902		92		150		108		92		88		96		91		91		94

by Zone

Weighted:

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

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Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
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Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Q14 In which town centre or retail park do you normally buy your family's other kinds of electrical goods such as TV, HiFi and computers?																				
Ammanford	3.1%	31	0.0%	0	0.0%	0	15.8%	29	0.0%	0	0.6%	1	1.4%	1	0.0%	0	0.0%	0	0.8%	0
Carmarthen (town centre only)	15.1%	151	54.9%	88	0.0%	0	3.9%	7	6.3%	5	14.4%	13	18.7%	11	13.2%	8	14.9%	10	17.9%	9
Cardiff	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Cross Hands	0.8%	8	0.7%	1	0.0%	0	0.4%	1	0.6%	1	5.3%	5	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Llanelli (town centre only)	8.1%	81	0.9%	1	23.3%	57	2.6%	5	13.1%	11	5.9%	5	1.1%	1	0.0%	0	1.3%	1	0.7%	0
Llandeilo	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.0%	7	0.0%	0	0.0%	0	0.0%	0
Llandovery	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	4	0.0%	0	0.0%	0	0.0%	0
Lampeter	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	3	27.4%	16	2.4%	2	0.0%	0
Merthyr Tydfil	0.3%	3	0.0%	0	0.0%	0	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newcastle Emelyn	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.8%	10	0.0%	0
Swansea	3.7%	37	0.0%	0	1.2%	3	14.5%	27	0.0%	0	2.7%	2	3.3%	2	0.0%	0	2.6%	2	2.3%	1
Parc Trostre Retail Park (Llanelli)	14.4%	144	0.0%	0	34.4%	84	12.7%	24	30.8%	26	11.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parc Pemberton Retail Park (Llanelli)	5.8%	58	0.0%	0	17.0%	41	2.1%	4	14.2%	12	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pensarn Retail Park (Carmarthen)	7.3%	73	15.5%	25	0.0%	0	0.0%	0	9.3%	8	2.8%	3	7.4%	5	19.4%	11	19.2%	12	18.1%	9
Stephens Way Retail Park (Carmarthen)	3.3%	33	0.0%	0	0.0%	0	8.3%	15	0.9%	1	6.2%	6	4.5%	3	0.0%	0	2.0%	1	13.3%	7
Internet / catalogue / mail order	18.8%	188	9.7%	15	16.9%	41	17.6%	33	18.6%	16	30.7%	28	16.5%	10	26.8%	16	29.9%	19	18.2%	9
Aberystwyth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.6%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Cardigan	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Central London	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Criccieth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Haverfordwest	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	3
Llandysul	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llanegwad	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Morfa Shopping Park, Swansea	0.8%	8	0.0%	0	0.0%	0	4.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nantgaredig	0.5%	5	0.9%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	2.9%	2	0.0%	0	0.7%	0	0.0%	0
Parc Y Llyn Retail Park, Aberystwyth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Pontarddulais	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St. Clears	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.6%	5
Tesco Extra, Morfa Lane, Carmarthen	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	6.0%	4	2.0%	1	0.0%	0	0.0%	0
Towy Ford Retail Park, Carmarthen	0.5%	5	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.7%	0	0.6%	0	0.9%	0
Ystradgynlais	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	1.1%	11	1.3%	2	0.0%	0	0.4%	1	2.2%	2	3.3%	3	0.0%	0	2.7%	2	0.0%	0	2.2%	1
(Don't buy these goods)	10.0%	100	13.1%	21	7.0%	17	15.1%	28	4.0%	3	14.2%	13	6.5%	4	5.9%	4	9.0%	6	8.6%	4

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Weighted base:	1001	160	243	187	85	92	61	59	64	51
Sample:	1002	110	162	130	100	100	100	100	100	100

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Q15 Are there any other shopping centres or other locations which you buy your family's other electrical goods such as TV, HiFi and computers? [MR]										
<i>Those who buy other kinds of electrical goods at Q14:</i>										
Aberaeron	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ammanford	1.2%	10	0.0%	0	0.0%	0	6.6%	10	0.0%	0
Carmarthen (town centre only)	4.5%	41	9.4%	13	0.0%	0	1.8%	3	1.5%	1
Cardiff	0.7%	6	0.8%	1	0.5%	1	0.0%	0	4.3%	4
Cross Hands	0.5%	5	0.0%	0	0.9%	2	0.0%	0	0.9%	1
Llanelli (town centre only)	3.1%	28	0.0%	0	9.8%	22	0.7%	1	4.7%	4
Llandeilo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandovery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lampeter	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Neath	0.2%	2	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Newcastle Emelyn	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	2.4%	22	1.0%	1	1.0%	2	8.2%	13	0.0%	0
Parc Trostre Retail Park (Llanelli)	3.7%	33	0.9%	1	5.7%	13	4.7%	8	3.2%	3
Parc Pemberton Retail Park (Llanelli)	2.2%	20	0.0%	0	4.4%	10	2.7%	4	5.5%	5
Pensarn Retail Park (Carmarthen)	2.1%	19	1.9%	3	0.0%	0	0.7%	1	0.8%	1
Stephens Way Retail Park (Carmarthen)	1.5%	13	0.0%	0	0.0%	0	2.5%	4	5.6%	5
Internet / catalogue / mail order	7.2%	65	7.8%	11	9.3%	21	6.8%	11	7.4%	6
Aberystwyth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bristol	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardigan	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crymch	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haverfordwest	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parc Fforestfach Retail Park, Swansea	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Parc Y Llyn Retail Park, Aberystwyth	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontardawe	0.3%	3	0.0%	0	0.0%	0	1.8%	3	0.0%	0
St. Clears	0.4%	4	2.2%	3	0.0%	0	0.0%	0	0.6%	0
Tesco Extra, Morfa Lane, Carmarthen	0.3%	3	0.9%	1	0.0%	0	0.0%	0	0.6%	0
(Don't know / can't remember)	1.3%	12	1.7%	2	1.3%	3	0.0%	0	3.1%	3
(Nowhere else)	68.1%	614	73.3%	102	68.9%	155	62.7%	99	63.8%	52
Weighted base:		901		139		226		158		82
Sample:		883		92		147		107		94

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Q16 In which town centre or retail park do you normally buy your family's DIY, hardware and gardening products?										
Aberaeron	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ammanford	3.3%	33	0.0%	0	0.0%	0	17.4%	32	0.0%	0
Bridgend	0.2%	2	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Carmarthen (town centre only)	15.8%	159	56.7%	91	0.0%	0	3.5%	7	5.0%	4
Cardiff	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cross Hands	3.7%	37	0.9%	1	0.0%	0	9.6%	18	0.0%	0
Llanelli (town centre only)	4.1%	41	0.9%	1	7.0%	17	3.7%	7	11.2%	10
Llandeilo	1.1%	11	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Llandovery	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lampeter	2.9%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.2%	2	0.0%	0	0.0%	0	1.1%	2	0.0%	0
Neath	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Newcastle Emelyn	1.5%	15	1.7%	3	0.0%	0	0.0%	0	0.0%	0
Swansea	3.4%	34	0.0%	0	1.0%	2	14.3%	27	0.0%	0
Parc Trostre Retail Park (Llanelli)	26.5%	265	0.0%	0	66.5%	161	22.0%	41	52.2%	44
Parc Pemberton Retail Park (Llanelli)	3.4%	34	0.0%	0	8.3%	20	3.0%	6	8.0%	7
Pensarn Retail Park (Carmarthen)	5.3%	53	11.8%	19	0.0%	0	0.6%	1	2.5%	2
Stephens Way Retail Park (Carmarthen)	1.0%	10	3.1%	5	0.0%	0	0.0%	0	0.9%	1
Internet / catalogue / mail order	3.2%	32	3.2%	5	1.0%	2	1.8%	3	1.2%	1
Aberystwyth	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Aberystwyth Road, Cardigan	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Morfa Retail and Leisure Park, Landore, Swansea	0.3%	3	0.0%	0	0.0%	0	1.5%	3	0.0%	0
B&Q, Old Towy Sawmills, Glanyrafon Road, Carmarthen	2.9%	29	3.5%	6	0.0%	0	0.6%	1	1.7%	1
Brecon Enterprise Park, Warren Road, Brecon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardigan	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haverfordwest	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Johnstown, Wrexham	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Kidwelly	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Llanboidy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandsul	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Llansamlet	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Llanybydder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Pembroke Dock	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
St. Clears	0.3% 3	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	6.2% 3
Whitland	0.3% 3	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	6.3% 3
Wyevale Garden Centre, Myrtle Hill, Pensarn, Carmarthen	0.4% 4	1.5% 2	0.0% 0	0.0% 0	0.0% 0	0.0% 0	2.3% 1	0.0% 0	0.0% 0	0.0% 0
Ystradgynlais	0.1% 1	0.0% 0	0.0% 0	0.4% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
(Don't know / can't remember)	1.3% 13	0.7% 1	1.2% 3	0.0% 0	0.0% 0	0.5% 0	3.3% 2	5.8% 3	4.0% 3	0.7% 0
(Don't buy these goods)	15.6% 156	15.4% 25	14.5% 35	18.6% 35	13.9% 12	13.4% 12	10.0% 6	16.6% 10	24.4% 16	11.6% 6
Weighted base:	1001	160	243	187	85	92	61	59	64	51
Sample:	1002	110	162	130	100	100	100	100	100	100

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Q17 Are there any other shopping centres or other locations which you buy your family's DIY, hardware and gardening products? [MR]										
<i>Those who buy DIY / Hardware or garden items at Q16:</i>										
Aberaeron	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ammanford	1.3%	11	0.0%	0	0.0%	0	4.0%	6	0.0%	0
Carmarthen (town centre only)	5.5%	47	7.7%	10	0.5%	1	3.8%	6	4.2%	3
Cardiff	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Cross Hands	1.8%	15	0.0%	0	0.0%	0	5.4%	8	1.0%	1
Llanelli (town centre only)	2.6%	22	0.0%	0	5.7%	12	1.5%	2	4.3%	3
Llandeilo	0.6%	5	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Llandovery	0.6%	5	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Lampeter	0.8%	7	2.7%	4	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.3%	3	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Neath	0.3%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0
Newcastle Emelyn	1.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	2.8%	24	1.0%	1	0.4%	1	8.6%	13	2.0%	1
Parc Trostre Retail Park (Llanelli)	4.3%	36	0.8%	1	5.5%	11	7.3%	11	4.5%	3
Parc Pemberton Retail Park (Llanelli)	3.7%	31	0.0%	0	12.3%	25	2.8%	4	0.9%	1
Pensarn Retail Park (Carmarthen)	3.3%	28	9.9%	13	0.0%	0	0.0%	0	7.6%	6
Stephens Way Retail Park (Carmarthen)	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Internet / catalogue / mail order	1.8%	15	1.1%	1	1.5%	3	0.0%	0	1.7%	1
Aberystwyth	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Aberystwyth Road, Cardigan	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Old Towy Sawmills, Glanyrafon Road, Carmarthen	0.7%	6	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Brecon Enterprise Park, Warren Road, Brecon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardigan	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Felinfach	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gorseinon	0.5%	4	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Kidwelly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Llansaint	0.2%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Morfa Shopping Park, Swansea	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Parc Y Llyn Retail Park, Aberystwyth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pembroke Dock	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pensarn	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Pontarddulais	0.4%	4	0.0%	0	0.5%	1	1.8%	3	0.0%	0

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
Port Talbot	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Red Roses	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St. Clears	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	3
Tregaron	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	3	0.0%	0	0.0%	0
Whitland	0.4%	4	0.0%	0	1.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Wyevale Garden Centre, Myrtle Hill, Pensarn, Carmarthen	0.4%	3	1.1%	1	0.5%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	0.9%	7	2.1%	3	0.0%	0	0.0%	0	0.7%	1	0.0%	0	3.7%	2	1.7%	1	0.8%	0	1.7%	1
(Nowhere else)	62.4%	527	64.1%	87	71.5%	148	62.3%	95	70.3%	51	53.6%	42	44.8%	25	58.7%	29	57.4%	28	48.6%	22
Weighted base:	845	135	208	152	73	79	55	49	49	45										
Sample:	839	90	135	103	85	88	90	86	78	84										

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
(Don't know / can't remember)	0.9% 9	0.8% 1	1.2% 3	0.9% 2	0.6% 1	0.6% 1	0.0% 0	1.1% 1	0.0% 0	1.6% 1
(Don't buy these goods)	10.4% 105	10.9% 17	10.9% 26	14.7% 27	3.0% 3	17.4% 16	6.6% 4	5.2% 3	2.1% 1	12.6% 6
Weighted base:	1001	160	243	187	85	92	61	59	64	51
Sample:	1002	110	162	130	100	100	100	100	100	100

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Q20 In which town centre or retail park do you normally buy your family's other non-food items such as books, toys, cds and gifts?										
Aberaeron	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ammanford	4.6%	46	0.0%	0	0.0%	0	23.7%	44	0.0%	0
Carmarthen (town centre only)	14.4%	145	42.9%	69	1.0%	2	1.1%	2	14.2%	12
Cardiff	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cross Hands	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Llanelli (town centre only)	6.3%	63	0.0%	0	16.3%	40	2.5%	5	14.8%	13
Llandeilo	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandovery	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lampeter	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Neath	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Newcastle Emelyn	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	4.7%	47	0.0%	0	7.7%	19	8.5%	16	4.1%	4
Parc Trostre Retail Park (Llanelli)	6.6%	67	0.0%	0	16.4%	40	5.1%	9	13.7%	12
Parc Pemberton Retail Park (Llanelli)	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0
Pensarn Retail Park (Carmarthen)	0.3%	3	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Stephens Way Retail Park (Carmarthen)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Internet / catalogue / mail order	38.8%	389	25.3%	40	37.6%	91	33.5%	63	41.3%	35
Aberystwyth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardigan	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crymych	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farnham, Surrey	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Felinfach	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haverfordwest	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandysul	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parc Tawe Retail Park, Swansea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontardawe	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Pontarddulais	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Pontyberem	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Tesco Extra, Morfa Lane, Carmarthen	1.1%	11	5.7%	9	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	1.0%	10	2.0%	3	0.0%	0	1.6%	3	0.0%	0
(Don't buy these goods)	18.7%	187	23.3%	37	19.8%	48	22.9%	43	10.9%	9
Weighted base:		1001		160		243		187		85
Sample:		1002		110		162		130		100

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Q21 Are there any other shopping centres or other locations which you buy your family's other non-food items such as books, toys, cds and gifts? [MR]										
<i>Those who buy other non-food items such as books, CDs, toys and gifts at Q20:</i>										
Aberaeron	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ammanford	0.8%	7	0.0%	0	0.0%	0	4.3%	6	0.0%	0
Carmarthen (town centre only)	7.8%	64	8.8%	11	0.0%	0	4.4%	6	6.2%	5
Cardiff	1.2%	9	2.9%	4	0.6%	1	0.7%	1	1.7%	1
Cross Hands	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Llanelli (town centre only)	3.6%	29	0.0%	0	10.9%	21	2.8%	4	1.4%	1
Llandeilo	1.3%	10	0.0%	0	0.0%	0	5.0%	7	0.0%	0
Llandovery	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lampeter	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newcastle Emelyn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	5.3%	43	3.1%	4	4.8%	9	13.5%	19	3.9%	3
Parc Trostre Retail Park (Llanelli)	6.0%	49	1.2%	1	11.3%	22	4.1%	6	13.9%	11
Parc Pemberton Retail Park (Llanelli)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Pensarn Retail Park (Carmarthen)	0.6%	5	1.2%	1	0.0%	0	0.0%	0	1.0%	1
Stephens Way Retail Park (Carmarthen)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue / mail order	6.5%	53	11.2%	14	4.2%	8	1.6%	2	11.3%	9
Aberystwyth	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardigan	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London	0.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Exeter	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gorseinon	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Narberth	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parc Fforestfach Retail Park, Swansea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Pontardawe	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Swansea Enterprise Park, Llansamlet, Swansea	0.5%	4	0.0%	0	0.0%	0	2.6%	4	0.0%	0
Tesco Extra, Morfa Lane, Carmarthen	0.2%	2	1.1%	1	0.0%	0	0.0%	0	1.0%	1
(Don't know / can't remember)	2.0%	16	1.7%	2	2.2%	4	3.7%	5	1.7%	1
(Nowhere else)	64.3%	524	67.7%	83	66.0%	129	60.3%	87	62.7%	47
Weighted base:	814	123	195	144	76	81	53	51	51	41
Sample:	772	82	120	97	84	80	84	78	74	73

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9										
GEN Gender of respondent																				
Male	33.7%	338	24.4%	39	39.2%	95	28.4%	53	26.7%	23	37.8%	35	44.7%	27	36.5%	22	43.4%	28	32.5%	17
Female	66.3%	664	75.6%	121	60.8%	148	71.6%	134	73.3%	62	62.2%	57	55.3%	34	63.5%	38	56.6%	36	67.5%	34
Weighted base:		1001		160		243		187		85		92		61		59		64		51
Sample:		1002		110		162		130		100		100		100		100		100		100
AGE Could I ask which of the following age bands do you fall into? [PR]																				
18-24	4.0%	40	0.0%	0	4.8%	12	0.0%	0	8.3%	7	13.4%	12	0.0%	0	11.5%	7	4.0%	3	0.0%	0
25-34	14.1%	141	5.7%	9	12.6%	31	19.3%	36	10.8%	9	22.0%	20	11.9%	7	15.0%	9	25.9%	17	5.9%	3
35-44	18.2%	182	11.3%	18	25.0%	61	21.3%	40	14.9%	13	15.6%	14	14.1%	9	17.8%	11	10.2%	7	21.1%	11
45-54	18.1%	182	23.5%	38	14.5%	35	17.1%	32	26.5%	22	18.1%	17	21.7%	13	9.5%	6	12.3%	8	21.6%	11
55-64	17.2%	173	18.8%	30	15.8%	38	14.9%	28	16.9%	14	12.5%	11	20.4%	12	22.1%	13	17.7%	11	27.1%	14
65+	24.0%	240	28.8%	46	24.3%	59	20.8%	39	21.6%	18	17.6%	16	28.6%	18	24.1%	14	29.0%	19	23.1%	12
(Refused)	4.3%	43	11.9%	19	3.0%	7	6.6%	12	1.0%	1	0.8%	1	3.4%	2	0.0%	0	1.0%	1	1.1%	1
Weighted base:		1001		160		243		187		85		92		61		59		64		51
Sample:		1002		110		162		130		100		100		100		100		100		100
CHI How many children (aged 17 or under) live in your household?																				
None	62.2%	622	77.4%	124	55.2%	134	59.0%	110	55.7%	47	62.7%	57	77.0%	47	48.5%	29	59.1%	38	70.6%	36
One	13.6%	136	6.7%	11	10.8%	26	16.6%	31	21.8%	19	11.4%	10	7.0%	4	22.9%	14	21.4%	14	15.4%	8
Two	15.6%	156	9.5%	15	25.3%	62	13.7%	26	18.2%	15	16.4%	15	4.1%	3	21.9%	13	10.9%	7	1.9%	1
Three	4.2%	42	2.3%	4	3.0%	7	2.1%	4	4.3%	4	7.9%	7	6.9%	4	6.6%	4	8.6%	6	5.5%	3
Four	1.6%	16	0.9%	1	3.2%	8	1.5%	3	0.0%	0	1.7%	2	2.3%	1	0.0%	0	0.0%	0	2.3%	1
Five or more	0.7%	8	0.0%	0	1.2%	3	1.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2
(Refused)	2.1%	21	3.2%	5	1.2%	3	5.6%	10	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	1.1%	1
Weighted base:		1001		160		243		187		85		92		61		59		64		51
Sample:		1002		110		162		130		100		100		100		100		100		100
ADU And how many adults (aged 18 or over) live in your household?																				
One	25.3%	254	27.2%	44	28.3%	69	25.8%	48	17.9%	15	20.6%	19	31.2%	19	20.2%	12	29.2%	19	18.6%	9
Two	55.4%	555	55.0%	88	50.4%	122	55.4%	103	60.4%	51	60.6%	55	57.2%	35	65.7%	39	53.8%	35	50.3%	26
Three	12.4%	124	10.6%	17	13.3%	32	11.5%	22	20.0%	17	9.0%	8	6.7%	4	9.1%	5	14.3%	9	17.6%	9
Four	3.8%	38	2.4%	4	3.4%	8	2.4%	4	1.7%	1	7.9%	7	3.7%	2	4.2%	2	2.1%	1	12.4%	6
Five or more	1.3%	13	1.6%	2	3.1%	7	0.6%	1	0.0%	0	1.2%	1	0.0%	0	0.8%	0	0.6%	0	0.0%	0
(Refused)	1.9%	19	3.2%	5	1.6%	4	4.4%	8	0.0%	0	0.7%	1	1.1%	1	0.0%	0	0.0%	0	1.1%	1
Weighted base:		1001		160		243		187		85		92		61		59		64		51
Sample:		1002		110		162		130		100		100		100		100		100		100

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		
CAR How many cars does your household own or have the use of?																				
None	8.5%	85	7.5%	12	11.9%	29	9.3%	17	3.6%	3	5.2%	5	7.6%	5	12.8%	8	5.8%	4	5.1%	3
One	40.1%	402	42.3%	68	36.6%	89	43.2%	81	35.1%	30	35.5%	32	44.6%	27	38.1%	23	53.2%	34	36.1%	18
Two	37.6%	377	33.7%	54	44.3%	107	35.3%	66	44.4%	38	43.2%	40	32.8%	20	31.7%	19	30.6%	20	26.9%	14
Three or more	11.7%	117	12.2%	19	6.0%	15	7.8%	15	17.0%	14	15.5%	14	13.9%	9	17.4%	10	8.7%	6	30.7%	16
(Don't know)	0.2%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	1.9%	19	3.2%	5	1.2%	3	4.4%	8	0.0%	0	0.7%	1	1.1%	1	0.0%	0	1.7%	1	1.1%	1
Weighted base:		1001		160		243		187		85		92		61		59		64		51
Sample:		1002		110		162		130		100		100		100		100		100		100

EMP Which of the following best describes your current employment status? [PR]

Employee in a full-time job (30+ hours per week)	39.0%	390	34.8%	56	36.9%	90	44.2%	83	50.6%	43	42.9%	39	34.7%	21	29.6%	17	33.2%	21	39.8%	20
Unemployed and available for work	3.6%	37	0.0%	0	2.9%	7	6.0%	11	0.9%	1	9.8%	9	1.8%	1	2.7%	2	7.6%	5	1.7%	1
Employee in a part-time job (under 30 hours per week)	14.1%	141	13.1%	21	14.6%	35	10.4%	19	11.3%	10	22.3%	20	14.0%	9	14.0%	8	16.7%	11	15.2%	8
Permanently sick / disabled	2.5%	25	2.3%	4	3.6%	9	2.3%	4	2.5%	2	0.0%	0	1.7%	1	6.5%	4	0.8%	1	1.6%	1
Self-employed (full or part-time)	4.6%	46	4.9%	8	2.3%	5	1.2%	2	5.0%	4	0.6%	1	10.2%	6	11.9%	7	11.2%	7	10.0%	5
Wholly retired from work	30.3%	304	38.2%	61	30.1%	73	29.8%	56	27.3%	23	20.5%	19	36.4%	22	28.3%	17	29.4%	19	27.5%	14
On a government supported training programme (e.g. modern apprenticeship / training for work)	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Looking after the home	1.7%	17	0.8%	1	4.2%	10	0.0%	0	1.7%	1	0.0%	0	0.0%	0	7.0%	4	0.0%	0	0.0%	0
Full-time education at school, college or university	1.3%	13	0.0%	0	3.7%	9	0.0%	0	0.9%	1	3.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Doing something else (PLEASE WRITE IN)	0.3%	3	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1
(Refused)	2.6%	26	5.0%	8	1.8%	4	5.6%	10	0.0%	0	0.5%	0	1.1%	1	0.0%	0	1.0%	1	2.0%	1
Weighted base:		1001		160		243		187		85		92		61		59		64		51
Sample:		1002		110		162		130		100		100		100		100		100		100

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

June 2015

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
PC Postcode										
SA14 6	3.1%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SA14 7	2.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SA14 8	7.4%	74	0.0%	0	30.5%	74	0.0%	0	0.0%	0
SA14 9	3.8%	38	0.0%	0	15.7%	38	0.0%	0	0.0%	0
SA15 1	4.0%	40	0.0%	0	16.4%	40	0.0%	0	0.0%	0
SA15 2	3.2%	32	0.0%	0	13.2%	32	0.0%	0	0.0%	0
SA15 3	3.4%	34	0.0%	0	13.9%	34	0.0%	0	0.0%	0
SA15 4	2.5%	25	0.0%	0	10.3%	25	0.0%	0	0.0%	0
SA15 5	3.3%	33	0.0%	0	0.0%	0	0.0%	0	35.8%	33
SA16 0	4.1%	41	0.0%	0	0.0%	0	48.2%	41	0.0%	0
SA17 4	3.5%	35	0.0%	0	0.0%	0	41.5%	35	0.0%	0
SA17 5	0.9%	9	0.0%	0	0.0%	0	10.2%	9	0.0%	0
SA18 1	4.3%	43	0.0%	0	0.0%	0	23.3%	43	0.0%	0
SA18 2	5.0%	50	0.0%	0	0.0%	0	26.9%	50	0.0%	0
SA18 3	6.7%	67	0.0%	0	0.0%	0	35.9%	67	0.0%	0
SA19 6	1.6%	16	0.0%	0	0.0%	0	0.0%	0	26.8%	16
SA19 7	1.0%	10	0.0%	0	0.0%	0	0.0%	0	15.8%	10
SA19 8	0.9%	9	0.0%	0	0.0%	0	0.0%	0	14.9%	9
SA19 9	0.7%	7	0.0%	0	0.0%	0	0.0%	0	11.3%	7
SA20 0	1.9%	19	0.0%	0	0.0%	0	0.0%	0	31.2%	19
SA31 1	1.9%	19	12.0%	19	0.0%	0	0.0%	0	0.0%	0
SA31 2	1.6%	16	10.3%	16	0.0%	0	0.0%	0	0.0%	0
SA31 3	3.1%	31	19.3%	31	0.0%	0	0.0%	0	0.0%	0
SA32 7	1.2%	12	7.5%	12	0.0%	0	0.0%	0	0.0%	0
SA32 8	1.8%	18	11.5%	18	0.0%	0	0.0%	0	0.0%	0
SA33 4	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SA33 5	2.4%	24	14.7%	24	0.0%	0	0.0%	0	0.0%	0
SA33 6	1.7%	17	10.9%	17	0.0%	0	0.0%	0	0.0%	0
SA34 0	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SA38 9	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SA39 9	2.2%	22	13.8%	22	0.0%	0	0.0%	0	0.0%	0
SA4 0	0.5%	5	0.0%	0	0.0%	0	2.5%	5	0.0%	0
SA4 8	2.1%	21	0.0%	0	0.0%	0	11.5%	21	0.0%	0
SA40 9	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SA44 4	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SA44 5	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SA48 7	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SA48 8	2.3%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:	1001	160		243	187	85	92	61	59	64
Sample:	1002	110		162	130	100	100	100	100	100

Carmarthenshire Household Survey For Nathaniel Lichfield & Partners

Weighted:

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
QUOTA Zone										
Zone 1	16.0%	160	100.0%	160	0.0%	0	0.0%	0	0.0%	0
Zone 2	24.2%	243	0.0%	0	100.0%	243	0.0%	0	0.0%	0
Zone 3	18.6%	187	0.0%	0	0.0%	0	100.0%	187	0.0%	0
Zone 4	8.5%	85	0.0%	0	0.0%	0	0.0%	0	100.0%	85
Zone 5	9.1%	92	0.0%	0	0.0%	0	0.0%	0	0.0%	92
Zone 6	6.1%	61	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 7	5.9%	59	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 8	6.4%	64	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 9	5.1%	51	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1001		160		243		187		85
Sample:		1002		110		162		130		100

Appendix 5 Household Survey Results Summary

1.0 Introduction

1.1 This report summarises the key findings of the household telephone survey which was carried out in June 2015 by NEMS Market Research to inform the Carmarthenshire Retail Study Update.

Survey Structure

1.2 A total of 1,000 telephone interviews were undertaken across the study area which was split into nine zones, based on postcode sectors.

1.3 The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

- Main food and top-up grocery shopping;
- Non-food shopping, including:
 - clothing and footwear;
 - furniture, furnishings and floor coverings;
 - domestic electrical appliances;
 - other electrical goods;
 - DIY, hardware and gardening products
 - health, beauty and chemist items; and
 - other non-food items (e.g. books, CDs, DVDs, toys and gifts).

2.0

Main Food Shopping

2.1

Large food stores are the main destinations for respondents' main food shopping trips across the study area. Overall, the Asda in Llanelli was the most popular shopping destination (10.3%), followed by Aldi in Carmarthen (9.6%), Tesco Extra in Carmarthen (8.4%) and Tesco stores in Ammanford (8.2%) and Llanelli (8.2%) for the study area as a whole, though different zones recorded different responses as the most popular destination for their main food shopping trip:

- **Zone 1:** Aldi, Carmarthen (31.6%), Tesco Extra, Carmarthen (31.1%), Morrisons at Parc Pansarn in Carmarthen (25.2%) and Lidl, Carmarthen (7.1%).
- **Zone 2:** Asda, Llanelli (29.5%), Morrisons, Llanelli (23.8%), Tesco Extra, Llanelli (23.4%) and Aldi, Llanelli (11.9%).
- **Zone 3:** Tesco, Ammanford (38.5%), Lidl, Ammanford (13.7%), Aldi, Cross Hands (12.1%) and Tesco in Pontarddulais (6.1%).
- **Zone 4:** Morrisons, Llanelli (18.6%), Asda, Llanelli (16.7%), Tesco Extra, Llanelli (15.8%) and Aldi, Llanelli (12.6%).
- **Zone 5:** Aldi, Cross Hands (37.9%), Tesco Extra, Llanelli (10.5%), Morrisons, Carmarthen (8.8%) and Tesco Ammanford (8.5%).
- **Zone 6:** Aldi, Cross Hands (19.6%), Co-op, Llandovery (17.4%), Co-op, Llandeilo (11.1%) and Tesco Extra, Carmarthen (9.6%).
- **Zone 7:** Sainsbury's, Lampeter (27.5%), Co-op, Lampeter (14.9%), Aldi, Carmarthen (11.2%) and Asda, Llanelli (10%). It's also notable that 15.9% of people in Zone 7 undertake their main food shopping via the internet / home delivery.
- **Zone 8:** Aldi, Carmarthen (17.4%), Tesco, Cardigan (12.2%), Tesco Extra, Carmarthen (11.3%) and Aldi, Cardigan (10%). 16% of respondents also stated they undertake main food shopping via the internet / home delivery.
- **Zone 9:** Aldi, Carmarthen (29.5%), Tesco Extra, Carmarthen (25.6%) and Morrisons, Carmarthen (12.2%).

2.2

Overall, 4.4% of respondents chose to do their main food shopping on the internet and have it delivered, which is a relatively high figure and made be due to the rural nature of the area. In particular, respondents in Zones 7 and 8 were most likely to undertake their main food shop in this way.

Frequency and Spend

2.3

Across the study area, 63.4% of respondents undertake a main food shop once a week, 16.5% more frequently and 17.9% less frequently.

2.4 In terms of spend, this varied considerably, although most respondents (10.2%) stated £96-£100.

3.0 Top-up Food Shopping

3.1 Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. Overall 72.6% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips.

3.2 The overall results show that, while the main food stores remain dominant, top-up shopping trips are dispersed over a larger number of stores, with the most popular two stores overall being Asda in Llanelli (4.4%) and Morrisons in Llanelli (3.3%).

Local Shops & Services

3.3 Respondents were asked which town and village they visit most frequently to use local shops and services. On a zone by zone basis, the different responses recorded as the most popular destination for local shops and services are as follows:

- **Zone 1:** Tesco Extra, Carmarthen (12.4%), Aldi, Carmarthen (9.5%), Marks & Spencer (8.3%) and Lidl, Carmarthen (8%).
- **Zone 2:** Asda, Llanelli (16.2%), Morrisons, Llanelli (12.2%), Co-op, Llanelli (7.5%) and Local shops, Llanelli (6.4%).
- **Zone 3:** Lidl, Ammanford (12.2%), Tesco, Ammanford (8.8%), Local shops, Ammanford (7.5%).
- **Zone 4:** Co-op, Kidwelly (18.3%), Co-op Bury Port (17.7%).
- **Zone 5:** Co-op, Cross Hands (18.1%), Aldi, Cross Hands (15%), Local Shops, Tumble (10.7%) and CK Supermarket, Llanelli (6.1%).
- **Zone 6:** Co-op, Llandeilo (11.3%) and Co-op, Llandovery (9.6%). Interestingly, 48% of respondents in Zone 6 do not do top-up shopping.
- **Zone 7:** Sainsbury's, Lampeter (25.8%), Co-op, Lampeter (15.9%) and Local shops, Lampeter (10.9%).
- **Zone 8:** Local shops, Llandysul (14.4%), Local shops, Newcastle Emlyn (11.2%), Co-op, Newcastle Emlyn (8.3%) and CK Supermarket, Newcastle Emlyn (8.2%).
- **Zone 9:** Co-op, Whitland (17.9%) Co-op, St Clears (17.2%) and Morrisons, Carmarthen (7.6%).

Frequency and Spend

3.4 In terms of frequency, 35.1% of respondents overall undertook top-up food shopping once a week, with 37% undertaking it more frequently than this and 11.4% less frequently.

3.5

The average spend for top-up food shopping varies, but the majority estimated that they spend £20 or less (67.6%)

4.0

Non Food Shopping

4.1

Respondents were asked in which location they usually buy the following non-food items. Below is a summary of the main responses given for the study area overall:

- **Clothing and footwear:** the most popular destination was Carmarthen town centre (32%), followed by Parc Trostre Retail Park (26.5%), internet / mail order (12%) and Swansea (8.7%).
- **Furniture, furnishings and floor coverings:** the majority of respondents stated that they shop for these items on the internet / mail order (12.8%). In terms of destinations, Carmarthen town centre was the most popular (10.8%), followed by Swansea (9.1%), Cross Hands (8.7%) and Parc Trostre (7.7%).
- **Domestic electrical appliances:** again for these items, the majority of respondents are purchasing via the internet / mail order (21.1%). This was followed by Carmarthen town centre (13.2%), Parc Trostre (12.3%) and Parc Pemberton (8.3%).
- **Other electrical goods:** the majority of respondents bought these items via the internet / mail order (18.8%). Other popular destinations were Carmarthen town centre (15.1%), Parc Trostre (14.4%) and Llanelli town centre (8.1%).
- **DIY, hardware and gardening products:** the most popular destination was Parc Trostre (26.5%), followed by Carmarthen town centre (15.8%) and Pensarn Retail Park (5.3%).
- **Health, beauty and chemist items:** for these items, the most popular location was Carmarthen town centre (22.3%), followed by Llanelli town centre (15.7%) and Parc Trostre (11.6%).
- **Other non-food items (e.g. books, CDs, DVDs, toys and gifts):** the majority of respondents (38.8%) stated that they usually purchased these items over the internet / by mail order. In terms of destination, the most popular location was Carmarthen town centre (14.4%), followed by Parc Trostre (6.6%) and Llanelli town centre (6.3%).

4.2

The table below summarises the shopping destinations with the highest proportion of respondents for each comparison goods category in each zone. This indicates broadly where people prefer to shop for each type of goods and allows comparison between each zone.

Table 4.1 Destinations with Highest Proportion of Response















	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Clothing and Footwear	Carmarthen Town Centre (75%)	Parc Trostre Retail Park (54%)	Parc Trostre Retail Park (27%)	Parc Trostre Retail Park (50%)	Parc Trostre Retail Park (39%)	Carmarthen Town Centre (54%)	Carmarthen Town Centre (52%)	Carmarthen Town Centre (58%)	Carmarthen Town Centre (67%)
Furniture / Floor Coverings	Carmarthen Town Centre (37%)	Parc Trostre Retail Park (21%)	Swansea (18%)	Swansea (15%)	Internet / Mail Order (21%)	Carmarthen Town Centre (15%)	Internet / Mail Order (26%)	Internet / Mail Order (21%)	Carmarthen Town Centre (23%)
Domestic Electrical Appliances	Carmarthen Town Centre (45%)	Parc Trostre Retail Park (27%)	Internet / Mail Order (22%)	Parc Trostre Retail Park (25%)	Internet / Mail Order (26%)	Internet / Mail Order (20%)	Lampeter (36%)	Internet / Mail Order (38%)	Pensarn Retail Park (20%)
Other Electrical Goods	Carmarthen Town Centre (55%)	Parc Trostre Retail Park (34%)	Internet / Mail Order (18%)	Parc Trostre Retail Park (31%)	Internet / Mail Order (31%)	Internet / Mail Order (17%)	Lampeter (27%)	Internet / Mail Order (30%)	Internet / Mail Order (18%)
DIY, Hardware and Gardening	Carmarthen Town Centre (57%)	Parc Trostre Retail Park (67%)	Parc Trostre Retail Park (22%)	Parc Trostre Retail Park (52%)	Carmarthen Town Centre (20%)	Carmarthen Town Centre (25%)	Lampeter (44%)	Newcastle Emlyn (20%)	Pensarn Retail Park (24%)
Health, Beauty & Chemist	Carmarthen Town Centre (83%)	Llanelli Town Centre (51%)	Ammanford (49%)	Parc Trostre Retail Park (25%)	Carmarthen Town Centre (24%)	Llandeilo (31%)	Lampeter (64%)	Newcastle Emlyn (40%)	Carmarthen Town Centre (43%)
Other Non-Food Goods	Carmarthen Town Centre (43%)	Internet / Mail Order (38%)	Internet / Mail Order (34%)	Internet / Mail Order (41%)	Internet / Mail Order (47%)	Internet / Mail Order (44%)	Internet / Mail Order (59%)	Internet / Mail Order (50%)	Internet / Mail Order (44%)

Source: NEMS Household Survey, June 2015



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