Planning and Retail Statement

Full Planning Application for a mixed-use development comprising a foodstore and coffee shop with drive thru together with associated access, car parking, drainage, landscaping, and other associated site works.

Burrows Yard, Afan Way, Port Talbot, SA12 6LL

June 2023

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Appendices

Status: Draft
Draft Date: June 2023

For and on behalf of Avison Young (UK) Limited

1. Introduction

1.1 This Planning and Retail Statement has been prepared to accompany and support a full planning application for a mixed-use development comprising a foodstore and coffee shop with drive thru together with associated access, car parking, drainage, landscaping, and other associated site works on the land known as Burrows Yard, Afan Way, Port Talbot. The application is submitted by Avison Young on behalf of Aldi Stores Ltd and Neath Port Talbot County Borough Council (as landowner).

1.2 The extent and location of the site is shown on the site location plan below.

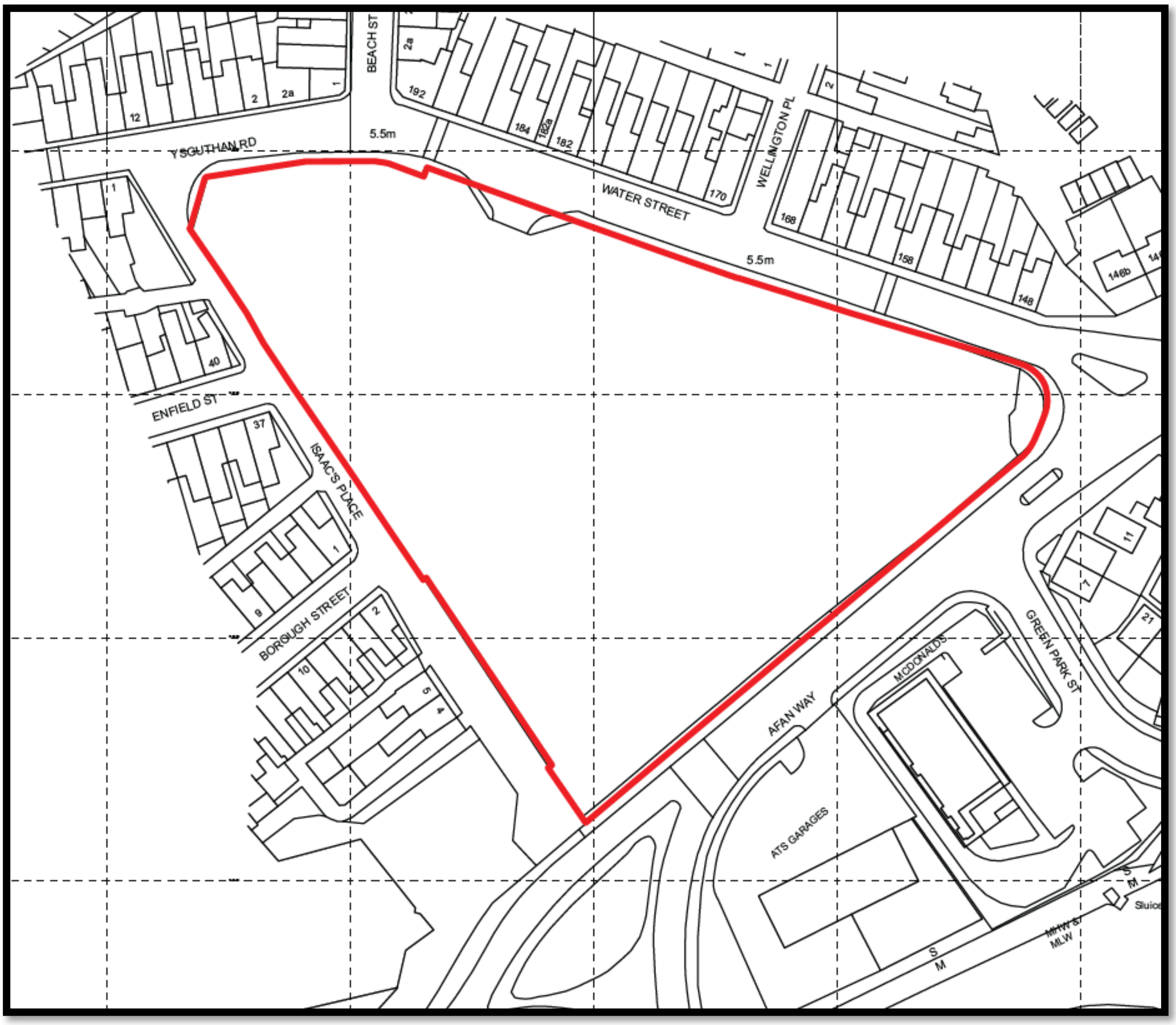


Figure 1: Site Location Plan

1.3 Aldi's business model is described in Section 4 of this assessment, which explains that the whole of the Aldi product range delivers high quality, low cost food and convenience goods. A standardised store format is key to underpinning Aldi's business model as it enables the delivery of savings in the development, servicing and stocking of Aldi's stores.

1.4 Aldi has sought to improve its store operating practices over the years to ensure that it continues to meet the needs of its customers whilst keeping cost to a minimum, thereby delivering exceptional value across its product range.

1.5 This statement seeks to demonstrate the acceptability of the proposed development in the context of relevant planning policy, taking into account the context of the site and the surrounding form of development.

2. Site Description

2.1 The site is located some 500m to the south-west of Port Talbot town centre and to the immediate north-west of the Harbourside Strategic Regeneration Area (allocated under LDP Policy SRA 2) which is an extensive area of brownfield dockland which is designated for a comprehensive mixed-use development comprising residential (385 homes), employment (7 ha), and A1 bulky comparison goods (3.37 ha). Harbour Way has been completed and provides excellent transport links to the M4.

2.2 The land is bordered by Afan Way to the south-east, and Isaac's Place to the south-west, and Water Street to the north. It is surrounded by predominantly residential uses to the north, east and west, with commercial uses to the south, including a McDonald's Drive Thru on the opposite side of Afan Way, and a modern residential development on the land allocated as part of the Harbourside Strategic Regeneration Area.

2.3 This triangular shaped site, commonly referred to as the former Burrows Yard Depot, was historically associated with the Burrows Tin Plate Works. It extends to some 1.2 hectares (2.98 acres) and is served by two existing accesses from Water Street along the site's northern boundary. Whilst the main access is currently via Water Street, former access points exist off Afan Way.

2.4 It comprises vacant previously developed brownfield land which has the benefit of a historic planning permission for retail development. This approved retail development was commenced but the developer pulled out mid-build leaving some steel portal framed structures on the site. The steel structures have been removed but the foundations remain. The site has been boarded up and vacant for well over a decade. According to the Welsh Index of Multiple Deprivation (WIMD), published by the Welsh Government in 2019, the application site falls within one of the most deprived areas of Wales (44^{th} out of 1909).

2.5 The site falls within the settlement boundary, as defined by the proposals map accompanying the Neath Port Talbot Local Development Plan (LDP) 2011-2026 (adopted January 2016).

2.6 The site is not allocated for any specified land use and is therefore classed as "white land".

2.7 There are no statutory or non-statutory designations affecting the site and there are no internationally designated nature conservation sites within 2km.

2.8 The site does not fall within a conservation area and there are no Scheduled Ancient Monuments or listed buildings within the immediate vicinity of the site.

2.9 The site is located within Flood Risk Zone C1 as defined by the Development Advice Map contained within Technical Advice Note 15: Development and Flood Risk (2004). It is located within Flood Risk Zone 1 according to the new Flood Map for Planning where less vulnerable uses (e.g. retail) are generally permitted.

2.10 The site location plan clearly defines the site and its context.

3. The Proposed Development

3.1 The description of development for the proposed scheme (on the full planning application form) reads as follows:

> *"Mixed use development comprising foodstore and coffee shop with drive thru together with associated access, car parking, drainage, landscaping, and other associated site works."*

3.2 Whilst the overall site area extends to some 1.2 hectares (2.98 acres), the proposed Aldi discount foodstore will be accommodated on a site area of 0.95 hectares and will have a gross internal area of 1,842 sqm (GEA of approximately 1,931 sqm) and a net retail sales area of 1,344 sqm. The foodstore will be served by 117 no. customer car parking spaces, including 6 no. disabled parking bays; 9 no. parent and child parking bays; 12 no. active electric vehicle charging points (EVCPs); and 4 no. external Sheffield cycle stands (i.e. 8 no. cycle spaces).

3.3 The Starbucks coffee shop with drive thru will be accommodated on a site area of 0.26 hectares. The coffee shop will have a gross internal area of approximately 170.6 sqm (GEA of approximately 188 sqm). It will be served by 28 no. customer car parking spaces, including 2 no. disabled parking bays; 6 no. active electric vehicle charging points (EVCPs); and 3 no. cycle spaces.

3.4 There will be a new shared vehicular site access constructed from Afan Way serving both the proposed Aldi foodstore and the Starbucks Coffee shop with drive thru. Service access for the Aldi foodstore is proposed off Water Street in the location of the existing site access. Both buildings have been sited to be highly visible to Afan Way, orientated with active frontages to the south side aside and entrances facing into the centre. The proposed foodstore will be located alongside the south-west boundary, similarly to the previously approved retail scheme layout, whilst the service area and delivery bay is tucked to the rear of the site. The coffee shop has been pulled away from the site boundary to distance the drive thru lane from the residential properties opposite. This provides an opportunity to provide a soft landscaped edge to the south-east corner and enhance the SuDS provision. In summary, the proposals comprise:

- a foodstore with a net retail sales area of 1,344 sqm;
- a Starbucks Drive Thru with a floor area of 188 sqm (GEA);
- a new shared site access road;

- 145 no. car parking spaces including 8 no. disabled bays, 9 no. parent and child bays, 18 no. electric vehicle charging point (EVCP) bays with provision made for an additional 12 no. EVCP bays in the future, and 6 no. bicycle hoops for secure cycle parking for up to 11 no. bicycles with staff cycle parking also provided internal to the foodstore warehouse;
- a scheme of hard and soft landscaping;
- drainage / SuDs features;
- covered trolley bay and cycle hoops;
- service yard to the northern side of the proposed foodstore accessed from the existing vehicular access onto Water Street;
- lighting columns to be installed to all car park areas;
- new stainless steel bollards to be installed around trolley bay and lobby area,
- boundary enclosures (walls/fencing), and
- totem sign (subject to a separate advertisement consent application).l

3.5 The proposed development is submitted as a full planning application, with all the detail submitted for the Council's consideration.

Planning History

3.6 Based upon a search and review of the Council's panning history records, there are a number of historic planning applications of relevance to the site. These are summarised below.

3.7 A planning application was originally granted permission for a proposed retail development of 5 units at this site known as Burrows Yard Depot, Water Street, Aberavon, with vehicular access from Afon Way.

3.8 A planning application by Dovey Estates Ltd was subsequently granted planning permission (LPA Reference P2004/1778) on 15th December 2005 for a proposed retail development of 4 units as opposed to 5 units (amended layout plan 10/8/057/0591) at this site. Condition No.3 attached to this permission restricted the sale of convenience goods from Units B and C. Condition No.5 required the submission and approval of an access plan showing visibility splays of 4.5m by 60m.

3.9 A planning application (LPA Reference P/2007/0591) was granted in August 2007 to vary the floor plans and elevational treatment of Unit D to meet the tenants' (Farmfoods) specific operational requirements.

3.10 A number of applications were subsequently submitted seeking amendments to the design of the retail units approved (including their sub-division) and the discharge of conditions but were withdrawn.

Pre-Application Enquiry

3.11 Avison Young, on behalf of Aldi, submitted a pre-application enquiry to Neath Port Talbot County Borough Council on 12th December 2022 for a proposed mixed-use development comprising a discount foodstore and a Starbucks coffee shop with drive thru on land north of Afan Way, Port Talbot, SA12 6LL.

3.12 This enquiry was accompanied by a series of proposed plans and drawings, together with a Retail Assessment Scoping Note and sought the Council's views of the proposals in respect of: the principle of the proposed development; the scope of the technical documents required in support of the planning application, and the form and content of the Retail Assessment, including key aspects of the sequential approach to site selection and the assessment of impact.

3.13 A pre-application meeting with the Council was held in January 2023. The applicant awaits a written response. However, some of the key design related matters raised during discussion included:

- How the height and massing of the development relates to neighbouring properties;
- Encouraging Active Travel through the creation of pedestrian links into and through the site;
- Design of the new access off Afan Way;
- Boundary treatments to the site perimeter, and
- Enhancing the EVCP provision across the site.

3.14 In accordance with the Town and Country Planning (Development Management Procedure) (Wales) Order 2012 (as amended), the draft planning application will be placed on deposit for a 28-day consultation period.

3.15 A full PAC Report will be submitted as part of the full planning application detailing the PAC programme and consultation process.

4. Aldi Stores Limited

4.1 Aldi is the applicant for this scheme and one of the world's leading grocery retailers. The company has built a network of stores in Europe, the USA and Australia. Aldi first entered the UK market in 1990 and has now expanded to over 950 stores across England, Scotland and Wales.

4.2 Aldi stores offer the customer a carefully selected range of high quality, exclusive own label groceries at heavily discounted prices. These prices are guaranteed across the entire range of products. The aim is for goods to be sold with discounts of between 20–30% for a full shopping trolley. This is evidenced by the below chart published by independent consumers' association 'Which?' in March 2020. The chart compares the average cost of a trolley of 108 groceries and household essentials (i.e. a bulk food shopping trip) and shows, for example, that an equivalent shop at a mainstream foodstore such as Tesco, Morrisons or Sainsbury is at least 27% more expensive. In the case of Asda specifically (the closest major foodstore), Aldi is found to be 10% cheaper.

Figure 2 - Chart Comparing Average Cost 108 Groceries and Household Essentials

Source: 'Which?' March 2020

4.3 Aldi regularly receives industry awards recognising the quality of its products and customer experience. Aldi was voted the nation's Favourite Supermarket and Favourite Wine Retailer at the 2019 Good Housekeeping Food Awards; named Best Value Supermarket at the Moneywise Home Finances Awards 2019; and Best Grocer at the Retail Week Awards 2019. For recognition of investment in people, Aldi was crowned Employer of the Year at The Grocer Gold Awards 2017, whilst they were named Grocer of the Year at The Grocer Gold Awards 2018.

How Aldi is different

4.4 Aldi has a very different approach to food retailing than other food retailers based on simplicity and maximum efficiency at every stage of the business, from supplier to customer. This enables Aldi to sell high quality products, from a limited core range (compared to other supermarkets) of mainly exclusive own labels, at the lowest possible price consistently across the entire range. Aldi is a 'deep discount' retailer.

4.5 The key aspects of the trading philosophy include:

- Maximum operational efficiency and cost control;
- Standard merchandising through the stores;
- Bulk displays in original shipping cases;
- Efficient operation from supplier to customer;
- Unique delivery system;
- Efficient checkout system;
- Carefully selected and limited core range of 2,000 products;
- Own label high quality products;
- Formidable buying power;
- High volume and turnover per product; and,
- Heavily discounted prices providing an average 20-30% saving across the entire range, compared with similar quality products.

4.6 The consequence of providing this value retailing concept and service, of high-quality food at heavily discounted prices, is that the design of the store and the sales area are uniform, in order to accommodate bulk food displays and provide the operational efficiency that a discount foodstore requires. These efficiencies are found across the entire operation from supplier to retail store and result in an enviable cost structure which allows Aldi to sell quality food at low prices, and operate on much smaller margins than other foodstores.

4.7 As stated, Aldi stores offer a carefully selected and limited core range of good quality exclusive own labels at heavily discounted prices. Predominantly, the limited range of goods relates to a reduced range of variations on the same product line compared to most other supermarkets. These are the most popular items: the ones most used and needed in every household.

4.8 By limiting the core range, Aldi suppliers typically only need to produce one package size instead of multiple packages within the same category. With the higher volume of one item, Aldi achieve greater purchasing power. The limited core range further allows Aldi to apply its own label to most of its products (c.90%) which do not include costs that the national brands pass on through higher prices. This allows Aldi to gain a significant cost advantage over competitors without compromising quality.

4.9 The deliberate intention is to restrict the range of core goods to approximately 2,000 products in the interests of the consumer and operational efficiencies and pass these savings onto the customer. The restricted core range ensures a high volume and turnover of each individual item, resulting in a favourable cash flow with products effectively sold through the checkouts before they have been purchased centrally.

4.10 This is unlike the larger supermarkets which stock in the region of 20,000 – 40,000 product lines, and more modest sized operators, with floor areas of 1,000 – 1,500sqm selling 2,500 – 4,000 products. Aldi do not sell cigarettes and tobacco products and their trading philosophy does not include a staffed butchery, fishmonger, bakery, delicatessen, or hot food counter, which are commonplace in larger supermarkets. Aldi stores also do not accommodate in store cafes / restaurants or franchises such as a Post Office, dispensing pharmacy, dry-cleaning, opticians, betting office, travel agent, mobile phone shop or photo processing.

4.11 Whilst the core range of products is limited, Aldi offers a significant choice of locally sourced produce. Where possible Aldi's fresh meat and produce is UK sourced. Fresh fruit and vegetables are also sourced in the UK when in season and Aldi leads the way in supporting British farmers. In addition, Aldi works with a range of local businesses and suppliers in order to supply fresh bread, milk and other dairy products.

4.12 Aldi's stores dedicate approximately 20% of their floorspace to comparison goods. These goods are sold as 'special purchases' on a 'when it's gone, it's gone' basis. This approach is highly seasonal and there is a continued variation in the type of goods that may be on offer. This is a key difference for Aldi when compared to larger supermarkets that typically have 30-40% of their floor area for comparison goods, the majority of which is occupied by permanent product ranges.

4.13 How Aldi differs is demonstrated clearly by the trading philosophy. Aldi complement, rather than compete with, existing local traders, independent retailers, and other supermarkets, as well as service providers, as Aldi customers use other facilities to fulfil their grocery and local service needs. This generates a propensity for linked trips and associated spin-off trade which brings qualitative benefits.

Sustainable development

4.14 Aldi supports sustainable development and has a strong track record in delivering schemes which contribute to the needs of the local economy.

Catchment

4.15 As Aldi stores are of modest scale and fulfil a local shopping role, it means more than one store can be accommodated in a Local Authority area. In high population density areas such as towns and cities several Aldi foodstores can be sustained, reflective of the fact that each is modest in size. They work together as a network to serve the community, as opposed to mainstream foodstores whereby a single 'superstore' serves a much wider geographic area. The catchment for a new Aldi foodstore is therefore typically local in nature and often a proportion of the shoppers attracted are existing Aldi customers who have been travelling to their nearest store (possibly several miles away), but with a new store opening close by, this can reduce their need to travel.

4.16 Aldi's local presence can assist in clawing back expenditure being spent elsewhere by providing a foodstore where perhaps such a facility was not available. This is most important in locations where shops and services are limited and access to stores elsewhere is difficult. A new store helps to retain expenditure within a given catchment area, to the benefit of the community.

Store operation and design

4.17 The uniform internal layout of an Aldi store reflects the company philosophy of offering value for money through cost effective management and efficiency. The shop fittings are specifically designed and constructed to display the goods as received in their packing cases so there isn't a double handling of goods from packing cases to the shelves. It means new stock can be moved from the warehouse area to the shop floor quickly and in large quantities.

4.18 The operation of the store is designed to be efficient and practical for use by customers; ensuring the store offers inclusive accessibility to all. The efficient layout with typically only 4 or 5 aisles means customers can move through the store quickly. There is ease of access to goods with all shelving being within easy reach. As the range of goods is limited customers can find what they are looking for quickly. With goods being pre-packaged, such as fruit and vegetables, customer can identify goods quickly and shop efficiently. Importantly, there are long conveyors at the check-out that hold a customer's full shop to allow goods to be unloaded for scanning and payment quickly. Goods are re-loaded back into the trolley at the check-out and packing is undertaken at the customer's leisure beyond the check-out area.

4.19 Aldi recognises that design is a key consideration in the determination of applications for its stores. The external design has evolved over time and now the design for each store is consistent across Aldi's portfolio, promoting modern, smart buildings with clean lines and glazed frontages which meet customer expectations.

Accessibility

4.20 The local nature of many of Aldi's stores encourages high levels of pedestrian shoppers and users of public transport. At new stores, cycle stands are provided, close to the store entrance for natural surveillance and mostly under the store canopy, to encourage cycling as a mode of transport.

4.21 Aldi requires new stores to have car parking adjacent to cater for customers who choose this mode of transport. Most car trips to new Aldi stores are not new to the network but rather transferred or linked trips. A full explanation of this principle is set out in the accompanying Transport Assessment.

Residential amenity

4.22 The opening hours of Aldi stores are more limited than some other larger supermarkets which operate 24-hour. Currently Aldi stores operate 08:00 to 22:00 Monday to Saturday and for six hours between 10:00 to 16:00 on Sundays, to comply with Sunday Trading Laws. As Aldi stores are located in residential areas, Aldi is committed to being a responsible neighbour and seeks to ensure the amenity of residents is maintained.

Job creation and training

4.23 New Aldi stores generally employ between 40 - 50 staff. The company's remuneration and training policy reflects Aldi's firm belief that a well-trained and highly motivated workforce is essential to the success of the business. All hourly paid wages for store employees exceed the Government's National Living Wage and the Living Wage Foundation's recommended national rate. Aldi offers full training for all its positions and the schedule and facets of the training are tailored to the individual.

4.24 Aldi ensure that its foodstores have a positive impact on the local communities that they are located within as recruitment is focused locally. Job vacancies are advertised in nearby stores and in the local press alongside Aldi's website. This approach usually results in the majority of staff being recruited from the local area. In addition, it is not unusual for the retailer to work with the local Job Centre Plus when recruiting for a new foodstore so that residents of the local area are specifically targeted.

4.25 It should be noted that part-time staff are placed on a 15, 20 or 25 hour contracts at above industry average pay. As such, many part-time positions at Aldi would actually be viewed as full-time positions in other industries, including the retail sector.

4.26 Aldi has two of the most successful apprentice schemes and graduate programmes in the UK. Apprentices are trained to work in all parts of the business including at store, distribution, logistics and management level, as well as progression through to the Store Management Team.

4.27 Aldi's on-going graduate scheme secures an annual intake for the Area Management Programme. Trainee Area Managers spend a year shadowing an Area Manager before they take on three to four stores of their own to manage. The training covers the entire spectrum of running a retail operation and is a UK-wide programme.

4.28 The construction of a new store requires the services of local building trade contractors which provides employment opportunities during the build out period. Usually a range of skills such as ground works, steel, brick and block work and shop fitting are sourced locally, as well as cleaners and labourers.

4.29 Finally, during the construction of the foodstore, by working with their chosen contractor Aldi are often able to identify individuals that are seeking work placements and may be able to accommodate these during the project. Aldi typically identify candidates that will benefit the most from the opportunity, particularly those that are currently undertaking some form of construction related education and training, and those that are looking to re-enter the industry after a period of absence. Aldi works with its appointed supply chain to support work placements.

Aldi Foodstore Sustainability Features

4.30 The following table sets out a summary of the sustainability features that are incorporated into each new Aldi foodstore as standard:

<table>
<tr><th>Main themes</th><th>Sub Theme</th><th>Proposed Measures to be Incorporated into the Development</th></tr>
<tr><td rowspan="4">Minimise Energy Use</td><td rowspan="2">Improving Building Envelope</td><td>Improve building fabric performance by using materials with low U values.</td></tr>
<tr><td>Reduce Air Permeability for the development.</td></tr>
<tr><td rowspan="2">Reducing Energy Demand</td><td>Use of LED technology for internal / external lighting.</td></tr>
<tr><td>Detailed Specification of energy saving fitting for refrigeration system.</td></tr>
</table>

	Allocation of Renewable Energy	Re-use of waste heat from refrigeration system to heat the retail area.
Sustainable Building Materials	Material Specification	Use of recycled and secondary aggregates where possible.
		Use of timber from sustainable sources, including the reuse of timber where possible, whilst procuring new timber from sustainable sources such as FSC and PEFC sources.
		Use of materials that where possible have a low embodied energy, including making firm commitments to procure materials from local sources where possible.
		Procuring materials will be done with consideration to manufacturers and suppliers with accredited EMS and ISO Standards.
Sustainable Transport and Accessibility		Cycle parking for the site would be provided in accordance with LPA cycle parking standards.
		One twin-headed Faster Charger for Electric Vehicles will be provided at all new stores with two dedicated parking bays. Ducting to a further four bays for potential future use.
Water Conservation and Management	Water Use within the Retail	A pulsed water meter would be proposed for the development to monitor water use.
		2/4 litres wc's in retail store.
	Minimising Flood Risk	Proposals would be put forward that would not add to the flood risk in the area. A number of SUDS and engineering solutions could be put forward for this purpose, subject to site specific conditions.
Waste Management	Construction Waste	Recycling would occur during the construction phase where waste would be segregated and split into recyclable components.
		General waste would be disposed of responsibly and sent to licensed waste handling facilities.
Reduction of detrimental Environmental Effects		Hydrocarbon traps will be placed around the perimeter of the car park area where necessary.
		The development does not include materials that are toxic to humans.
		All insulation materials and refrigerants have an ODP value of 0 and a GWP of 5 or less.
		Where necessary, land contamination would be remediated.
		External lighting will be compliant to best practice guidelines from the Institute of Lighting.

Site Management	Commissioning and Handover	A building user guide and building education would be provided as part of the development's handover.

Heat Recovery System (Re-Usable Energy)

4.31 Perhaps the most significant sustainability feature which is provided as standard on all new Aldi foodstores is their 'heat recovery system', which constitutes a 're-usable' energy source. In order to minimise energy demand in stores, Aldi seek to re-use and re-cycle any waste energy where possible. The greatest area to recover energy in the store is the 'waste heat' generated by the refrigeration system and this is recovered to heat the building.

4.32 Aldi use a system to recover waste heat from the food refrigerator circuits which would otherwise be discharged into the atmosphere. The heat from the refrigerator would previously have been rejected when the refrigerant hot gasses are cooled in the condensers by external air. Previously a gas heating system was used to make up any shortfall in heating demand.

4.33 With the input and detailed design of a 'refrigeration engineer' and a 'mechanical services engineer', the waste heat is harnessed via a CO2 refrigerant lead heat recovery system that rejects the waste heat into a low temperature hot water heating circuit which in turn provides heat to an underfloor heating array or a number of ceiling mounted convectors on the sales floor if the store is leasehold. This system provides 100% of the total building heating demand. The heat recovery system has totally removed the need for an independent gas heating system. The underfloor heating system provides heat to the store with a high percentage of radiant heat, minimising the negative affect that the sales floor chillers have on the store heating.

4.34 To demonstrate the effectiveness of this system, Aldi have used a typical model in Leicester which, being in the Midlands, represents the average for the whole of the UK. The typical energy demand for an Aldi Development in the Midlands is 271,624 kwh per year. The total energy demand for heating to an Aldi Store is 115,416 kwh. The refrigeration installation would generate 150,000 kwh which is more than sufficient to heat all the store.

4.35 With all the energy demand required to heat the building, being recovered from re-usable energy, 115,416 kwh of the total energy demand for the building of 271,624 kwh is generated from re-usable energy. This represents over 40% of the energy demand for the development being created by re-usable energy. Whilst it is acknowledged that this system is not technically a form of 'renewable energy', it results in the foodstore being exceptionally efficient in terms of the off-site energy requirements. This is a more environmentally friendly approach than an otherwise inefficient building that benefits from a limited on-site renewable energy source.

5. Planning Policy Context

5.1 This section provides a review of relevant planning policy and guidance at the national and local level in so far as it is material in assessing the merits of the site for the proposed development.

Introduction

5.2 Section 38(6) of the Planning and Compulsory Purchase Act 2004 requires than an application for planning permission should be determined in accordance with the Development Plan, unless material considerations indicate otherwise.

5.3 The planning policy that supports the proposal exists at a number of levels and extends to a range of guiding documents.

5.4 National guidance comprises Planning Policy Wales PPW (Edition 11, January 2021), as well as a range of supplementary Technical Advice Notes (TANs). At the local level, the Neath Port Talbot Local Development Plan (LDP) (2011-2026) (adopted 27th January 2016) constitutes the statutory Development Plan against which the proposals will be assessed. Policies of relevance in terms of both the national and local context are set out below.

The Local Development Plan

5.5 The Planning and Compulsory Purchase Act 2004 introduced the requirement for all local planning authorities to produce a new form of development plan for their areas – a Local Development Plan. Accordingly, the Neath Port Talbot Local Development Plan (LDP) 2011-2026 was adopted on 27th January 2016 and comprises of a range of detailed objectives and policies against which all planning applications are considered.

5.6 The site is located within the settlement boundary of Port Talbot and is not allocated for any specific land use on the proposals map which accompanies the LDP (and is therefore "white land"). It is located in an out-of-centre location in retail policy terms. As such, the following policies of the LDP are applicable to the proposals for a new foodstore and coffee drive thru:

- **Policy SP3 (Sustainable Communities)** concerns the delivery of sustainable, healthy and cohesive communities by defining locations for development by the identification of a settlement hierarchy that reflects the role and function of settlements, as well as defining settlement limits within which development which accords with the settlement hierarchy will be permitted in principle.

- **Policy SC1 (Settlement limits)** stipulates that development within settlement limits that is proportionate in scale and form to the role and function of the settlement, as set out in the settlement hierarchy, will be acceptable in principle.

- **Policy SP4 (Infrastructure)** states that where necessary planning obligations will be sought to ensure that the effects of developments are fully addressed in order to make the development acceptable.

- **Policy I1 (Infrastructure Requirements)** indicates that, in addition to infrastructure improvements necessary to make a development acceptable in health, safety and amenity terms, additional works or funding may be required to ensure that, where appropriate, the impact of new development is mitigated, e.g. biodiversity, environmental and conservation interests, or improving access to facilities and services including the provision of walking and cycling routes.

Area Based Policies

- **Policy SRA2 (Harbourside Strategic Regeneration Area)** allocates an extensive area of brownfield dockland to the east and south of the subject site, close to Port Talbot town centre, for a comprehensive mixed-use development comprising residential (385 homes), employment (7 ha), and A1 bulky comparison goods (3.37 ha).

Topic Based Policies

- **Policy SP10 (Open Space)** stipulates that provision will be made to ensure that all residents have access to adequate open space through ensuring that new development addresses local needs and retaining and protecting existing open space.

- **Policy OS1 (Open Space Provision)** asserts the need for employment or commercial development proposals of over 1,000sqm to provide associated amenity space.

- **Policy SP12 (Retail)** states that the vitality, viability and attractiveness of Neath Port Talbot's retail centres will be enhanced and the County Borough's retail provision protected, supported and developed by identifying a retail hierarchy within which appropriate retail and mixed uses will be protected and encouraged, and the control of inappropriate retail uses outside the identified hierarchy. The first preference should be to locate retail development within a retail and commercial centre, in accordance with the retail hierarchy. The retail hierarchy aims to direct development to town centres, then district centres, local centres and finally out of centre locations. The retail hierarchy defines Port Talbot as a town centre.

- **Policy SP16 (Environmental Protection)** stipulates that air, water and ground quality and the environment generally will be protected and where feasible improved by ensuring that proposals have no significant adverse effects in water, ground or air quality and do no significantly increase pollution levels and by giving preference to the development of brownfield sites over greenfield sites where appropriate and deliverable.

- **Policy SP18 (Renewable and Low Carbon Energy)** sets out several objectives for meeting national renewable energy targets and energy efficient targets. These include: encouraging where appropriate, all forms of renewable energy and low carbon technology development; encouraging energy conservation and efficiency measures in all new major development proposals; and ensuring that development will not have an unacceptable impact on the environment and amenity of local residents.

- **Policy R3 (Out of Centre Retail Proposals)** sets out the criteria wherein retail development within settlement limits but outside the defined retail centres will be permitted: It is demonstrated that there is a need for the development; and the development cannot be accommodated within a defined retail centre and is located in line with the sequential approach; and the vitality and viability of existing retail centres will not be undermined taking into account the cumulative effects of other approved retail developments, recently completed developments and plan commitments; and the proposal would not undermine the council's retail hierarchy or any regeneration schemes that the Council has formally approved.

- The supporting text in Paragraph 5.2.49 goes on to state that: 'Proposals for retail development outside of the defined retail centres will be strictly controlled in accordance with national policy in order to ensure that the retail centres are supported and enhanced as far as possible'.

- **Policy EN6 (Important Biodiversity and Geodiversity Sites)** stipulates that development proposals that would affect Regionally Important Geodiversity Sites (RIGS), Local Nature Reserves (LNRs), Sites of Interest for Nature Conservation (SINCs), sites meeting SINC criteria or sites supporting Local Biodiversity Action Plan (LBAP) or S42 habitats or species will only be permitted where: (1) they conserve and where possible enhance the natural heritage importance of the site; or (2) the development could not reasonably be located elsewhere, and the benefits of the development outweigh the natural heritage importance of the site.

- **Policy EN7 (Important Natural Features)** states that development proposals that would adversely affect ecologically or visually important natural features will only be permitted where (1) full account has been taken of the relevant features in the design of the development, with measures put in place to ensure that they are retained and protected wherever possible, or (2) the biodiversity value and role of the relevant feature has been taken into account and where removal is unavoidable, mitigation measures are agreed.

- **Policy EN8 (Pollution and Land Stability)** stipulates that proposals which would have an adverse effect on health, biodiversity and/or local amenity or would expose people to unacceptable risk due to air, noise, or light pollution, or contamination, land instability, will not be permitted.

- **Policy EN9 (Developments in the Central Port Talbot Area)** states that developments in the central Port Talbot area that could result in breaches of air quality objectives during their construction phase, will be required to be undertaken in accordance with a Construction Management Plan submitted as part of the planning process and agreed by the Council.

- **Policy RE2 (Renewable and Low Carbon Energy in New Developments)** encourages proposals to include schemes that connect to existing sources of renewable energy, district heating networks and incorporate on-site zero/low carbon technology. It also states a requirement for development with a total floorspace of 1,000 sqm to submit an Energy Assessment to determine the viability of incorporating such a scheme, and where viable proposals may be required to implement the scheme.

- **Policy W3 (Waste Management in New Development)** requires commercial development that would generate in excess of 1,000 tonnes of waste per annum to produce a Site Waste Management Plan. The plan should demonstrate that provision is made for the design, layout, storage and management of the waste generated by the development both during the construction phase and occupation.

- **Policy TR2 (Design and Access of New Development)** asserts that development proposals will only be permitted where the following criteria are satisfied: the development does not compromise the safe and effective use of the highway network or create unacceptable levels of traffic generation; appropriate levels of parking and cycling facilities are provided and the access arrangements for the site allow for the safe manoeuvring of service vehicles associated with the planned use; the development is accessible by a range of travel means, including public transport and safe cycle and pedestrian routes; Transport Assessment and Travel Plans are provided for developments that are likely to create significant traffic generation.

- **Policy BE1 (Design)** states that all development proposals will be expected to demonstrate high quality design which fully takes into account the natural, historic and built environmental context and contributes to the creation of attractive, sustainable places. The relevant criteria is listed below:

- It complements and enhances the character and appearance of the site, building or area in terms of siting, appearance, scale, height, massing and elevation treatment;
- It utilises materials appropriate to its surroundings and incorporates hard and soft landscaping and screening where appropriate;
- It would not have a significant adverse impact on highway safety, the amenity of occupiers of adjacent land or the community;
- Important local features (including buildings, amenity areas, and green spaces) are retained and enhanced as far as possible;
- It achieves and creates attractive, safe places and public spaces, taking account of 'Secured by Design' principles;
- It plays a full role in achieving and enhancing an integrated transport and communications network promoting the interests of pedestrians, cyclists and public transport and ensures linkages with the existing surrounding community;
- Its drainage systems are designed to limit surface water run-off and flood risk and prevent pollution;
- The layout and design of the development achieves inclusive design by ensuring barrier free environments, allowing access by all and making full provision for people with disabilities.

Supplementary Planning Guidance (SPG)

5.7 The Council provides a range of Supplementary Planning Guidance (SPG) which comprises detailed guidance on the way in which policies of the LDP will be applied in particular circumstances or areas. All necessary guidance has been taken account of when designing the scheme. The SPGs of relevance to the application are as follows:

- **Planning Obligations (October 2016)**
- **Parking Standards (October 2016)**
- **Biodiversity and Geodiversity (May 2018)**

- **Pollution (October 2016)**
- **Open Space & Greenspace (July 2017)**
- **Renewable and Low Carbon Energy (July 2017)**
- **Design (July 2017)**

National Planning Policy and Guidance

Planning Policy Wales

5.8 Planning Policy Wales (Edition 11, January 2021) (PPW) sets out the land use planning policies of the WG and is supplemented by a series of Technical Advice Notes (TANs). This contains guidance for the preparation of Local Authority development plans, development management, and sets out the WG commitment to creating sustainable developments.

5.9 The fundamental objective of PPW is to promote sustainable development and improve the social, economic, environmental and cultural well-being of Wales, as required by the Planning (Wales) Act 2015, the Well-being of Future Generations (Wales) Act 2015 and other key legislation. The commitment of the Welsh planning system to sustainable development is underpinned throughout the document. The 2012, 2014, 2016 and 2021 revisions of PPW saw an array of changes which were aimed at supporting a presumption in favour of sustainable development.

5.10 Chapter 2 identifies 5 Key Principles for achieving the right development in the right place. These are as follows:

- Growing our economy in a sustainable manner;
- Making best use of resources;
- Facilitating accessible and healthy environments;
- Creating & sustaining communities, and
- Maximising environmental protection and limiting environmental impact.

5.11 In responding to the key principles for the planning system, PPW states that development proposals must seek to deliver development that addresses the following national sustainable placemaking outcomes.

- Creating and sustaining communities
- Making best use of resources
- Maximising environmental protection and limiting environmental impact
- Growing our economy in a sustainable manner
- Facilitating accessible and healthy environments

5.12 It is accepted that not every development will be able to demonstrate it can meet all of these outcomes.

5.13 PPW must be used to implement placemaking. To do so, proposals should be prepared within the context of the key planning principles of the planning system in order to meet the well-being goals.

5.14 PPW first requires development proposals to be assessed against the 'Strategic and Spatial Choices' (Chapter 3). Thereafter, an assessment must be made of the detailed impacts of the development proposal and its contribution to 'Active & Social Places' (Chapter 4), 'Productive & Enterprising Places' (Chapter 5) and 'Distinctive & Natural Places' (Chapter 6).

5.15 The results of the assessment should promote well-being goals and sustainable placemaking outcomes, by ensuring the proposals contribute to sustaining or creating sustainable places and delivering the national sustainable placemaking outcomes identified above.

5.16 The Welsh Government identifies a number of overarching objectives for retail and commercial centres which planning authorities should deliver through their development management decisions ensuring their maximum contribution to the well-being goals. The planning system must:

- promote viable urban and rural retail and commercial centres as the most sustainable locations to live, work, shop, socialise and conduct business;
- sustain and enhance retail and commercial centres' vibrancy, viability and attractiveness; and
- improve access to, and within, retail and commercial centres by all modes of transport, prioritising walking, cycling and public transport.

5.17 PPW stipulates that, in determining planning applications, planning authorities should first consider whether there is a need for additional retail provision, which may be quantitative, to address a quantifiable unmet demand for the provision, or qualitative. It will be for the planning authority to determine and justify the weight to be given to any qualitative assessment. Regeneration and additional employment benefits are not considered qualitative need factors in retail policy terms. However, they may be material considerations in making a decision on individual planning applications if the regeneration and job creating benefits can be evidenced.

5.18 The Welsh Government operates a 'town centres first' policy in relation to the location of new retail and commercial centre development. In implementing this policy, planning authorities should adopt a sequential approach when determining planning applications for retail and other complementary uses. By adopting a sequential approach first preference should be to locate new development within a retail and commercial centre defined in the development plan.

5.19 PPW stipulates that all retail planning applications or retail site allocations of 2,500 sq. metres or more gross floorspace that are proposed on the edge of or outside designated retail and commercial centres should, once a need has been established, be supported by a retail impact assessment. Requests for retail impact assessments by planning authorities on smaller developments should be proportionate to potential impacts.

Technical Advice Notes (TANs)

5.20 As set out above, PPW is supplemented by a series of Technical Advice Notes (TANs). TAN 4 (Retail and Commercial Development) is of particular relevance to the proposals and was updated in November 2016 to bring it in line with PPW. This revised document replaces TAN 4 (Retailing and Town Centres), which was adopted in November 1996.

5.21 The Welsh Government's objectives for retail and commercial centres are to:

- Promote viable urban and rural retail and commercial centres, as the most sustainable locations to live, work, shop, socialise and conduct business.
- Sustain and enhance retail and commercial centres vibrancy, viability and attractiveness.
- Improving access to, and within, retail and commercial centres by all modes of transport, especially walking, cycling and public transport.

5.22 PPW recognises that retail and commercial centres are the focal point for shopping, leisure and tourism, local services and business/employment opportunities. This 'town centres first' approach ensures, through policy and decision making, that retail and commercial centres should be the first choice location in assessing the most appropriate places for a wide variety of developments. The co-location of these uses and their high levels of accessibility by a range of transport options make them sustainable locations.

5.23 TAN4 stipulates that the sequential location of development plan allocations or planning application should be considered in the following order:

- Firstly, within retail and commercial centres.
- If no suitable sites are available in retail and commercial centres then edge-of centre locations should be considered, with preference given to brownfield sites that are well connected to the existing centre and accessible by a variety of means of transport.
- Only when retail and commercial centres and edge of centre locations have been considered and found to be unsuitable can out-of-centre options within, and outside, a settlement are to be considered. Preference to brownfield out-of-centre sites should be given, which are or will be served by a choice of means of transport and are close to established retail and commercial centre.

5.24 With regard to suitability, where a developer favours a development on the edge or outside a retail centre, evidence will need to be provided to explain why potential sites or buildings within the centre are unable to accommodate the format, scale and design of a proposed development. Retailers should be flexible an innovative about the format, design and scale of the proposed development and the amount of car parking needed.

5.25 TAN4 requires retail development over 2,500 sqm gross floorspace to be supported by an impact assessment, although smaller retail planning application may also be assessed where local planning authorities believe it will have a significant impact on a retail or commercial centre.

5.26 In addition to the need and sequential tests, TAN4 stipulates that planning applications for retail development outside a retail centre that are not in accordance with the development plan should be assessed against a range of impact criteria, including:

- Impact of the proposal on existing, committed and planned public and private investment in a centre or centre in the catchment area.
- Impact of the proposal on centre vitality and viability, including local consumer choice and range and quality of the comparison and convenience retail offer.
- Consideration of the cumulative effects of the development proposal in relation to any outstanding planning permissions.
- The impact of the proposal on allocated sites outside centres being developed in accordance with the development plan.

- Impact of the proposal on in centre trade and turnover in the centre and other centres in the wider area, taking account of current and future consumer expenditure capacity in the catchment area.

- Assessment of the proportion of customers using the development travelling by different modes of transport.

- Impact on travel patterns over the catchment area.

- Any significant environmental impacts.

5.27 In addition to TAN 4, the following TANs are also applicable to the proposals:

- **Technical Advice Note 5 (Nature Conservation and Planning)** was published in 2009 and is to supplement the information provided in PPW. This provides advice for local planning authorities on the key principles of positive planning for nature conservation; nature conservation and Local Development Plans; nature conservation in development management procedures; development affecting protected internationally and nationally designated sites and habitats; and development affecting protected and priority habitats and species.

- **Technical Advice Note 12 (Design)** was updated in March 2016 and provides detailed advice on how good design in development may be facilitated by the planning system. The guidance states that good design has the potential to assist in environmental sustainability, economic growth and social inclusion. The guidance places particular emphasis on the achievement of sustainable design solutions, sustaining or enhancing character, promoting innovative design solutions, ensuring access for all and promoting legible development.

- **Technical Advice Note 15 (Flood Risk)** was published in July 2004 and advises on development and flood risk together with its impact on sustainability principles. It also provides a framework to assess fluvial and tidal flooding, and run-off from development. The overriding aim of the guidance seeks to locate new developments away from areas identified at high risk of flooding. The coming into force of the new TAN 15 and Flood Map for Planning on 1st December 2021 has been suspended until further notice.

- **Technical Advice Note 18 (Transport)** was published in March 2007 and recognises the key role of the planning system to facilitate sustainable travel patterns. As in TAN 12, the guidance aims to influence the location of new development to reduce the need to travel and subsequently promote more sustainable forms of transport which contribute to environmental improvement in the longer term.

- **Technical Advice Note 20 (Planning and the Welsh Language)** was published in October 2017. This provides guidance on how the planning system considers implications of the Welsh language.

- **Technical Advice Note 23 (Economic Development)** was published in February 2014 and focuses on the need to encourage development in order to generate wealth, jobs and income. This TAN recognises the importance of all aspects of development and that planning decisions are made in a sustainable way which balance social, environmental and economic considerations.

Community Infrastructure Levy (CIL)

5.28 In 2008 the Planning Act was amended to make provisions for local authorities to prepare a Community Infrastructure Levy (CIL) for their own areas (if so desired). This would take the form of a charging schedule that would subsume a lot of matters that are currently secured through the use of Section 106 Legal Agreements which are the usual method for obtaining infrastructure improvements to mitigate the impacts of development proposals. It should be noted that it is not the purpose of CIL to replace Section 106 obligations. CIL is intended to directly assist in the delivery of the Council's land use aims and objectives of the LDP.

5.29 At this point in time, the Council has not introduced a CIL charging schedule as it has assessed all of the essential infrastructure needed to deliver the Local Development Plan (LDP) strategy and established that it can be delivered through other mechanisms outside the remit of CIL. As LPAs are not bound to introduce CIL charging schedules, the Council will continue to rely on planning obligations to provide any necessary infrastructure needed within the County Borough.

6. Planning Considerations

Preface

6.1 The application proposals are compliant with policy provisions at the national and local level and the way this can be achieved is demonstrated by the detail submitted in the application package. This identifies the key development influences that have been taken into account when designing the proposals for the site.

6.2 This assessment demonstrates that the proposals accord with the detailed LDP policy requirements identified in Section 5. These include matters of design, transportation, ecology, landscaping, flood risk and drainage.

6.3 As required by Section 38 (6) of the Planning and Compulsory Purchase Act 2004, the application proposals have been assessed against all relevant national and development plan policies and other material considerations, and have been found to be in compliance.

6.4 In this context, we believe the primary issues in this instance to be:

- The Principle of Development;
- Character and Appearance;
- Highway Safety;
- Ecology;
- Archaeology;
- Noise;
- Air Quality;
- Drainage and Flood Risk;
- Impact upon the Welsh Language, and
- Socio-Economic Benefits.

Principle of Development

6.5 The application site is not allocated for any specific land use purpose on the proposals map which accompanies the LDP (and is therefore "white land"), there are no listed buildings nearby, and it is not located within a conservation area.

6.6 In retail policy terms, the site is located in an out-of-centre location. The default national threshold for undertaking a retail impact assessment is 2,500 sq.m gross. The proposed Aldi foodstore and Starbucks coffee shop with drive thru would not exceed this figure and NPTCBC does not appear to have a lower locally-set threshold in adopted policy.

6.7 On the basis that the proposed food store will comprise a lower quantum of retail floorspace than the national threshold of 2,500 sq.m or greater gross A1 floorspace, and there is no adopted development plan local threshold, a retail impact assessment would not ordinarily be required. Nevertheless, this statement has been prepared to deal with the relevant retail policy tests at the local and national level. The following sections of this assessment will, therefore, consider the matters of retail impact, need, and the sequential test.

6.8 The impact analysis is set out within Section 9 of this statement. In summary, it is clear that the proposed discount foodstore and coffee shop will not give rise to any significant adverse impacts upon the vitality and viability of any surrounding centre and no conflict is therefore anticipated with Paragraphs 4.3.26 and 4.3.27 of PPW and TAN4.

6.9 The retail capacity assessment is set out within Section 7 and concludes that these is a demonstrable need for the proposed development and there is no conflict with PPW guidance in this regard.

6.10 A sequential assessment has been undertaken to demonstrate that the application site is the most sequentially preferable site. As set out in Section 8 of this statement, it is considered that there are no sequentially preferable sites within a realistic catchment area for the scale and form of development proposed and compliance can therefore be demonstrated with the sequential approach to site selection as set out in Paragraphs 4.3.18 to 4.3.24 of Planning Policy Wales.

6.11 The proposals pass the sequential test, need and impact test and thus complies with national and local planning policies and guidance. As such, we consider the principle of the proposed development to be acceptable.

6.12 This assessment demonstrates how the development proposals have regard to other applicable material considerations including character and appearance, highway safety matters, ecology, archaeology, noise, air quality, drainage and flood risk, the Welsh language, as well as socio-economic benefits, and these are discussed in turn below.

Character and Appearance

6.13 The application site is situated at the former tin plate works, Burrows Yard, Port Talbot. It lies in a built-up area of Port Talbot, north of the River Afan and the harbour, which was previously of industrial nature but now also includes housing.

6.14 The site is currently waste ground with abandoned concrete building foundations on the west side. It is demarcated by temporary fencing, bounded by Water Street to the northeast, Isaac's Place to the southwest and the A4241 to the southeast.

6.15 From a visual perspective, the proposed regeneration of this previously developed site would be beneficial to the surrounding area. The proposal presents the opportunity to fully utilise a long standing vacant brownfield site within an existing urban area and breathe new life into the community, help to generate investment and jobs within the local area.

6.16 There will be a new shared vehicular site access constructed from Afan Way which aligns with the Dwr Cymru/Welsh Water easement that crosses the site (north-south) and will serve both the proposed new Aldi foodstore and the Starbucks coffee shop with drive thru which will be located in the eastern part of the site with frontage onto Afan Way and Water Street. The proposed access into the Starbucks Coffee Shop with Drive Thru is considered to be positioned a sufficient distance from the proposed main junction onto Afan Way.

6.17 The proposed foodstore will be located along the site's western boundary with Isaac's Place. The closest residential property would be No.1 Borough Place at a distance of approximately 12m to its gable end, whilst it would be some 12.5m to the gable end of No.37 Enfield Street. As shown on the proposed elevations, the building will have a mono-pitch roof and the lowest part of the roof will be along this site boundary. Given the proposed roof height and the separation distance to the nearest residential properties, there will be no detrimental impact upon these neighbours in terms of overbearing, overshadowing or overlooking.

6.18 The application is supported by a Landscaping Scheme which provides details of the proposed landscape enhancements proposed for the site including the addition of native species hedgerow, species rich grassland and trees within the soft landscaping. This would benefit wildlife and represents a net gain in biodiversity for the site.

6.19 The proposals will, therefore, result in betterment to the visual appearance of the site and surrounding area. This is in accordance with PPW and LDP Policy BE1.

Highway Safety

6.20 The proposed site access would include a revised bellmouth radii to allow access for HGV servicing vehicles and dropped kerbs and tactile paving would be included as part of the design layout. The carriageway width of the access road into the site would be 7.5m bounded by 2.0m wide footways to both sides.

6.21 The proposed access would include pedestrian footways to both sides leading to the main entrance. There would also be secondary points of pedestrian/cycle access from Water Street and Afan Way providing access to the Aldi and Starbucks respectively. This would provide a contiguous link to all existing footways and further improve the public realm for trips on foot and bicycle.

6.22 The site access visibility envelope would be in compliance with local design standards and accord compliant visibility splays for a 30mph zone.

6.23 Servicing would be consistent with Aldi's and Starbucks' long established methods and the site access will be designed to provide safe and efficient access for turning of service vehicles.

6.24 In terms of walking, within a walk distance of 2.0km, the site is accessible on foot via footways along all local roads, providing a continuous link between the site and the local area. This includes controlled and uncontrolled pedestrian crossing points with dropped kerbs. There is good permeability of footway links through the local area with a network of footpaths and footways adjacent and to the south of the site linking the site to residential areas. A good proportion of travel to and from an Aldi foodstore is often made on foot therefore this would provide a good environment to aid connected journeys by this mode of travel. Footways are provided on both sides of Afan Way with a crossing point provided approx. 60m to the north of the site access which includes dropped kerbs, tactile paving and refuge as well as some traffic calming. There are no identified hazards to pedestrians accessing the site.

6.25 There is no existing dedicated cycle provision local to the site. That said, the majority of the side roads which form the main non-car access routes are subject to 20mph speed limits and benefit from traffic calming. These routes therefore afford cyclists adequate opportunity to cycle to the site. However, as detailed in the Transport Assessment, the Council have numerous schemes coming forward that will actively promote travel to the site by bicycle. There are no major obstacles to customers or staff walking or cycling to and from the site.

6.26 In terms of public transport, four existing bus services (including route no. 84, 85, 86 and 87/88) pass along Water Street, with stops including layby, shelter and raised kerbs located within 100m of the site, with no obstructions to pedestrians accessing the stops to/from the site. The town's bus station is some 480m from the site.

6.27 It is evident that opportunities exist to travel to and from the site by foot, bike, and by local public transport. The site is well located to encourage sustainable modes of travel and to reduce reliance on the private car. It is, therefore, compliant with local and national transport planning policy.

6.28 According to the Council's parking SPG (2016), the site is located within Parking Zone 3 and the usual standard which would apply for parking spaces is 1 per 40sqm GFA. Based on this standard, a 1931 sqm GFA foodstore would require 48 no. spaces. It is noted that if the foodstore was actually 69 sqm larger, the requirement would be 138 no. spaces. The proposed scheme includes provision for 117 no. spaces which represents a significant increase compared to standards. However, the proposed level of parking is commensurate with Aldi's known operational needs, particularly as customer dwell times are between 20 and 40 minutes, and it is very similar to the parking levels provided at several other local consented Aldi foodstores.

6.29 According to the Council's parking SPG (2016), the level of parking for the proposed Starbucks coffee shop with drive thru will be decided on a case-by-case basis. The proposed 28 no. spaces are operator driven and are therefore considered to be the appropriate provision in this location.

6.30 Consistent with policy, cycle parking would be located in proximity of the main entrance to the Aldi store in a step free and convenient location close to the main entrance using 4 No. Sheffield type stands (i.e. 8 No. cycle spaces). Cycle parking for Aldi is normally provided at the front of the store in an easy to locate and convenient position. Staff cycle parking would be provided integral to the warehousing areas, as per other stores and this would be in accordance with the SPD Sustainable Travel requirements. More details are provided in the Travel Plan.

6.31 The Transport Assessment concludes that the development proposals are not expected to lead to any localised material off-site highways issues on the adjacent transportation network. It is therefore concluded that the impact has been fairly and reasonably addressed and there should be no reason for highways related objection to the proposed development. The addition of the development traffic is modest in scale and the development is considered unlikely to introduce or lead to any new material impact on road safety.

Ecology

6.32 The application is supported by an Ecology Impact Assessment (Document Reference 15539_R01_CS_PW) prepared by Tyler Grange to establish any habitats and features with potential to support protected and/or notable conservation priority species.

6.33 The site is not covered or directly adjacent to any statutory sites designated by nature conservation importance. The site is 100 m from the Neath and Port Talbot Waterways Site of Interest to Nature Conservation (SINC). Additionally, the site has a record of the small blue butterfly *Cupido minimus*, a Section 7 species, presence of which meets the criteria in Neath Port Talbot County Borough Council for consideration as a SINC.

6.34 An extended Phase 1 survey was undertaken on the 18th January 2023. The site comprises of a mosaic of grassland, scrub and ruderal species. The grassland was primarily comprised of species found in species poor grassland, with the site beginning to succeed to bramble and buddleia scrub and a longer tussocky grassland sward. Correspondence with NPT Council specified that the sites habitat did meet the criteria of open mosaic on previously developed land a priority habitat under section 7 of the Environment (Wales) Act. There are no trees or hedgerows within the site.

6.35 The site's relatively recent habitats (site was cleared approximately 10 years ago) and its lack of connectivity to the wider environment, limits its potential for protected species. There are records within the site of the aforementioned small blue butterfly in 2019. Small blue butterflies require kidney vetch *Anthyllis vulneraria*, for their caterpillars, kidney vetch is an early succession species which due to the relative lack of management within the site may no longer be present, though would likely still be within the seedbank.

6.36 The proposals will result in the loss of all current habitats on-site including hardstanding, spoil and refuge, dense and scattered scrub, ruderal and grassland mosaics. There is potential during site clearance for legislation protecting nesting birds to be triggered, as such works would be timed outside of the nesting season (typically perceived as March – August) or preceded by a check from a suitably qualified ecologist.

6.37 The proposals include drainage, SUDs and associated landscaping including native species grassland and hedgerow. Native tree planting comprising hazel, field maple, holly and hawthorn will be planted in a native species hedge mix. In addition, trees designed to improve air quality, such as Norway maple *Acer platanoides*, gingko *Ginkgo biloba* and silver birch *Betula pendula,* have been included within the planting scheme. The SUDS features include marginal vegetation comprising yellow iris *Iris pseudacorus*, reed sweet grass *Glyceria maxima*, purple loosestrife *Lythrum salicaria* and water forgetmenot *Myosotis* *scorpioides*. Additionally, there will be areas of grassland planting including species such as wild carrot, common knapweed *Centaurea nigra* and oxeye daisy *Leucanthemum vulgare*, of benefit to a range of pollinating species.

6.38 The site has historic presence of the Section 7 habitat open mosaic on previously developed land, and the Section 7 species, the small blue butterfly. Whilst the habitats on site have deteriorated through lack of management/disturbance the historic seed bank and relatively recent identity as a Section 7 habitat supporting small blue butterfly compensation is required to comply with national and local planning policy.

6.39 In order to compensate for the loss of on-site habitats and small blue butterfly, off-site compensation has been designed and is within the final stages of implemented by NPT Council. In addition, the scheme has been designed to include native species planting which would benefit a variety of pollinating species as well as species they themselves support, such as birds; habitat enhancements for invertebrates and nesting starling are also provided.

6.40 With the implementation and enhancement strategy described in the Ecology Impact Assessment, it is considered that the proposed development would be in conformity with relevant policy and legislation.

Archaeology

6.41 An Archaeological Impact Assessment (Document Reference 1577) has been undertaken by Foundations Archaeology and is submitted in support of the planning application.

6.42 A single heritage asset, the Burrows Tin Plate Works (GGAT08614w) identified on the Historic Environment Record (HER) is present within the site and elements of the buildings and ancillary structures and infrastructure may survive as buried deposits. Other structures including former residential housing along the northeastern boundary and various industrial buildings in the eastern part of the site area are unlikely to be of any appreciable archaeological value; these structures are not listed on the HER. The walkover survey did not identify any further archaeologically significant features.

6.43 The Heritage Impact Assessment (HIA) has considered the potential for heritage assets with an archaeological interest to be present on the site, based on the known archaeological remains that are presently recorded in the vicinity. The potential has been assessed as *negligible* or *negligible-low* with up to *moderate* significance for all periods prior to the development of the site as a tin plate works in 1874. If buried heritage assets associated with the industrial works were present, they would most likely be of *low* or *moderate* significance, depending on their nature and ability to contribute to regional or national research frameworks in regard to industrial history and usage. The presence of heritage assets of *high* significance cannot be entirely ruled out but is considered extremely unlikely.

6.44 The high level of modern disturbance across the site suggests that potential for buried assets could be very low in localised areas and generally low to moderate across the site. The proposed development nonetheless has the potential to harm any such buried assets with a consequent loss of significance despite the identified disturbance caused by demolition and the insertion of modern piles for steel frames erected for buildings consented in 2004 but never completed. It is also possible that remediation works, including the grubbing out of foundations have been undertaken as recommended in geotechnical reports for the retail development, in which case survival of features associated with the tinworks may be minimal, but there is no evidence as to whether the recommendations were implemented.

6.45 Given the uncertainties associated with the potential of the site area to contain buried heritage assets the local planning authority may consider that further archaeological investigation and recording would be appropriate to mitigate any potential harm. It is noted, however, that the practicalities of such work may render them dis-proportionate.

Noise

6.46 An Environmental Noise Assessment has been undertaken by Sharps Redmore and is submitted in support of the planning application. Based on a thorough assessment against objective standards, noise associated with the proposed Aldi foodstore and the drive thru facility would comply with the objectives of national and local planning policies. The report justifies the proposed Aldi foodstore operation (trading and servicing) between 0700 and 2300 hours and the unrestricted use of the Starbucks coffee shop with drive thru. This is in accordance with PPW and LDP Policy EN8.

Air Quality

6.47 An Air Quality Impact Assessment has been undertaken by Entran and is submitted in support of the planning application. This has been carried out to assess both the construction and operational impacts of the proposed development.

6.48 An assessment of the potential impacts during the construction phase has been carried out in accordance with the latest Institute of Air Quality Management Guidance. This has shown that for the proposed development, limited releases of dust and particulate matter are likely to be generated from on-site activities. However, through good site practice and the implementation of suitable mitigation measures, the impact of dust and particulate matter releases may be effectively mitigated and the resultant impacts are considered to be negligible.

6.49 ADMS Roads dispersion modelling has been carried out to assess the impact of the operation of the proposed development on local pollutant concentrations. The results indicate that predicted concentrations of relevant pollutants (NO_2, PM_{10} and $PM_{2.5}$) concentrations are below the relevant air quality assessment levels at nearby sensitive receptors.

6.50 In accordance with the EPUK & IAQM significance criteria, the overall impact of the operation of the proposed development on NO_2, PM_{10} and $PM_{2.5}$ concentrations is considered to be negligible.

6.51 It is concluded that air quality does not pose a constraint to the proposed development, either during construction or once operational. This is in accordance with PPW and LDP Policies EN8 and EN9.

Landscaping

6.52 A Soft Landscaping Proposals Plan (Drawing Ref. 15539/P02 Rev A) has been prepared by Tyler Grange and submitted in support of this application. This sets out the proposed soft landscaping for the proposed development. This is also set out in the Design and Access Statement.

Drainage and Flood Risk

6.53 The drainage, water resources and utilities required by the proposed development have been considered as part of the preparation of this planning application.

6.54 Following the implementation of Schedule 3 of the Flood Water Management Act 2010 in Wales, developments with a construction area greater than 100m² are required to incorporate Sustainable Drainage Systems (SuDS). All such systems are required to be approved by the SuDS Approval Body (SAB) under an approval application and required to be adopted by the SAB where they serve more than a single property. A separate SAB application will be submitted accordingly.

6.55 Infiltration of surface water generated by the development will not be viable due to near-surface contamination and cohesive soils beneath the site. Disposal of surface water is therefore proposed to be to the River Afan via two new outfalls. Since the river is tidal at this location, any additional flow from the site will have a negligible impact on the flood risk elsewhere and the discharge from the site will not be restricted on this basis.

6.56 Surface water will discharge by gravity for as much of the site as possible, however levels dictate that pumping will be required from some areas. It is anticipated that some attenuation storage may be required to prevent flooding on the site during the event of the outfalls being tidally locked, and the outfall pipes may also have a throttling effect on the rate. The systems will be designed to have enough storage capacity to prevent flooding for all storm durations up to and including the 1 in 30- year return period event, plus a 40% increase in rainfall intensity as allowance for climate change. MicroDrainage System 1 software will be used to size the pipes and MicroDrainage Simulation and Source Control software will be used to model the integrated below ground drainage system.

6.57 The surface water drainage systems for the ALDI and Starbucks units will remain separate and will each serve only an individual property, therefore will not be offered for adoption to the SAB.

6.58 The foul drainage from each of the two properties will discharge to one of the existing public sewers which cross the site. The sewers are both at considerable depth and a gravity discharge will be achievable. A Section 106 direct sewer connection application for each of the properties will need to be completed and agreed with Welsh Water prior to construction. Please refer to the Proposed Drainage Layout Plan (Drawing Reference: 0050 Rev A) prepared by Craddys and submitted in support of the application.

6.1 In terms of flood risk, the site is located within Flood Risk Zone C1 according to NRW's Development Advice Maps and Flood Risk Zone 2 according to the new Flood Map for Planning where less vulnerable uses (e.g. retail) are generally permitted. The site is not at significant risk of tidal flooding compared to fluvial, which is dominant, however the site benefits from defences against both forms of flooding. Neither the site not its access are at risk of surface water flooding and are not at elevated risk from other forms of flooding. The site is not at risk from tidal or fluvial flooding within the commercial thresholds set out by TAN15 over the majority of a 75-year commercial design life. It is recommended that a flood emergency plan be developed to help manage the residual risk and as part of this, a subscription to the Flood Warning Service should be maintained. Please refer to the Flood Consequence Assessment (Document Reference: 10985w0005a) prepared by Craddys and submitted in support of the application. In summary, this concludes that the development as proposed is appropriate and it meets the requirements of TAN15 and PPW.

Impact Upon the Welsh Language

6.2 TAN 20 (Planning and the Welsh Language) seeks to safeguard and promote the interests of the Welsh language through development proposals and states that:

> *"In determining individual planning applications and appeals where the needs and interests of the Welsh language may be a material consideration decisions must, as*

with all other planning applications, be based on planning grounds only and be reasonable." (Paragraph 4.1.2, Page 14, TAN 20).

6.3 In accordance with this policy context, the impact of the proposal on linguistic character of the surrounding area is a material consideration. The development proposal will provide a new foodstore and a coffee shop drive thru to contribute to the existing offer in the immediate area and to support the other uses within the area. The employees and customer base generated will contribute to the prosperity of the area as a whole. The provision of job opportunities will provide further opportunities for Welsh speakers to remain in the area. As such, the proposal will not have a detrimental impact upon the needs and intensity of the Welsh language.

Socio-Economic Benefits

6.4 The proposed development will deliver significant benefits to the area, not just in terms of visual betterment, but in terms of economic development and community benefits. Further details about job creation and training are provided in Section 4. Obstructing developments such as these is clearly not the intention of the Welsh Government or the Council through PPW or the LDP.

6.5 It is also important to consider the economic benefits that the development of the site will have at the construction stage and during the operation of the proposed uses. Such matters are supported by Technical Advice Note 23 (Economic Development). The construction phase will generate jobs and inject expenditure into the local economy, also providing subsidiary income for other businesses (i.e. suppliers, professional services, etc.).

Conclusion on Planning Considerations

6.6 In light of the above, it is considered that the proposal is acceptable and on balance, taking account of the material considerations and evidence provided in support of the planning application, the proposal complies with objectives of the development plan.

7. Retail Need/ Capacity

7.1 As outlined at Section 5, Paragraph 4.3.14 of PPW requires planning authorities to consider if there is a need for additional retail provision when determining planning applications for retail land uses. Paragraph 4.3.15 clarifies that *"Need may be quantitative, to address a quantifiable unmet demand for the provision concerned, or qualitative."* It continues that precedence should be given to quantitative need particularly for development plan allocations. Paragraph 4.3.16 then sets out the range of considerations for qualitative need, which comprise amongst others, where a proposal:

- *"Supports the objectives and retail strategy of an adopted development plan or the policies in this guidance;*
- *is highly accessible;*
- *contributes to a substantial reduction in car journeys;*
- *contributes to the co-location of facilities;*
- *assists in the alleviation of over-trading;*
- *addresses locally defined deficiencies in provision in terms of quality and quantity;*
- *alleviates a lack of convenience goods provision in a disadvantaged area."*

7.2 We consider both are relevant in the context of these development proposals, with this section of the report considering them in more detail.

7.3 The last retail study undertaken for the Council area was the Neath Port Talbot Retail Study in July 2013 ('NPTRS). Due to its age, a new household survey was commissioned through NEMS in April 2023. The enclosed is a retail capacity and impact assessment following a standard and recognised step-by-step methodology, with the full tables enclosed at **Appendix 5.**

7.4 The capacity assessment focuses on convenience retail floorspace within the proposed foodstore, given this represents the majority of retail floorspace proposed. The amount of comparison goods floorspace proposed within the foodstore is small and ancillary to the main convenience role of the Aldi store.

Assessment of Quantitative Need

Household Survey and Study Area

7.5 NEMS were instructed to complete a household shopping survey covering ten postcode sectors, with four most closely related to Aldi's anticipated 5-minute drivetime primary catchment area. The four that most closely resemble the primary catchment are SA12 6, SA12 7, SA12 8 and SA13 1. These are similar to, but slightly smaller than, Zone 1 of the 2013 Council Retail Study.

7.6 In order to understand inflow into the primary catchment, surveys were extended to cover adjacent postcode sectors SA11 1 and SA11 2 (known as Zone 2) reflecting the southern part of Neath, sectors SA12 9 and SA13 2 (Zone 3), relating to Cwmafan and Margam, with postcode sectors CF33 4 and CF33 6 (Zone 4), relating to North Cornelly and Pyle. These areas allow us to understand the trading influence of major foodstores and centres which surround Port Talbot. This decision was informed by the conclusions at paragraph 5.12 of the NPTRS, where it had confirmed that *"Stores in Port Talbot also attract a significant market share of spending from residents of Zone 3, including 47% of main food shopping trips and 34% of top-up food shopping trips. Beyond these zones, Port Talbot has a much smaller market share in Zones 1, 4, 6, 7 and 8."* In light of these small levels of inflow from those areas, modest assumptions based on the 2013 Study have been used later in the assessment in respect to retail capacity/needs conclusions.

7.7 The NEMS survey interviewed 500 people across the Study Area, with the numbers interviewed and zonings recommended by NEMS to ensure a response rate reflective of populations within the area. This survey was completed in April 2023.

7.8 The Study Area for the household survey is enclosed at **Appendix 1**.

7.9 The household survey questions, and full tabulation of the findings are provided at **Appendix 4** and provide an in-depth analysis of shopping behaviour, existing turnover and trade draw of main stores and the defined centres.

7.10 We also use the findings of the household survey in our retail impact assessment included within Section 9.

Table 1 – Turnover of Proposed Development

7.11 Table 1 of **Appendix 5** (RIA) estimates the convenience and comparison goods turnover of the proposal. The Aldi store will have a total net sales area of 1,344 sq.m. Of this sales area the vast majority will be given over to the sale of convenience goods (80% / 1,075 sq.m), with the remainder used for the sale of a purely ancillary range of non-food (comparison) goods (20% / 269 sq.m). The foodstore's convenience / comparison goods floorspace split has been provided by Aldi and the retailer would be willing to accept a planning condition limiting trading floorspace to the percentages tested.

7.12 A sales density of £11,199 per square metre (2021 Prices) has been applied to the convenience goods floorspace of 1,075 sq.m and grown to 2023, the base year, providing a maximum convenience goods turnover of £11.49m. This is anticipated to increase by a small degree by the test year of 2026 (£11.84m) (Source: Experian Retail Planner Briefing Note 20 (February 2023). This sales density is drawn directly from Global Data 2021.

7.13 In terms of comparison goods foodstore, a sales density of £7,876 per square metre has been applied to the proposed Aldi floorspace of 269sqm and grown to the base year, to provide a maximum comparison goods turnover of £2.19m in 2023 (increasing to £2.27m in 2026).

7.14 Finally, it should be noted that for both the convenience and comparison goods elements of the proposals, sales densities have been projected forwards using Experian's latest floorspace efficiency growth assumptions from Figures 4a and 4b (Page 16) of the Experian Retail Planner Briefing Note 20 (February 2023). This briefing note has been prepared following the height of the Covid-19 pandemic and therefore takes into account the latest economic implications for sales densities over the period to our test year of 2026.

Population (Table 2a)

7.15 The base population (2023) within the Study area has been sourced directly from up-to-date Experian Location Analyst data (May 2023 Report). The baseline population has then been projected forward to the test year of 2026 in line with Experian's growth forecasts (utilising the March 2023 data report).

7.16 On this basis, the defined Study area is identified to contain a resident population of approximately 79,317 people in 2023, which is set to increase to 79,923 people by the test year of 2026. This table then shows the individual population projections for each Zone identified earlier, with Zone 1 (which closely resembles the primary catchment), increasing from 32,285 in 2023 to 32,408 in 2026.

Per Capita Expenditure Assumptions (Tables 2b + c)

7.17 Per capita convenience base expenditure data for our catchment area has been sourced from up-to-date catchment specific Experian Location Analyst data (May 2023 Report). Our analysis of convenience goods (Table 2b) expenditure capacity then draws upon 'forecast' growth rates as set out under Figure 6, Appendix 3, of the Experian Retail Planner Briefing Note 20 (February 2023).

7.18 In terms of an allowance for Non-Store Retail Trade (NSRT) / Special Forms of Trading (SFT) – such as online shopping, etc. – our assessment is based on the allowance identified at Figure 5, Appendix 3, Page 20, of Experian's Retail Planner Briefing Note 20, February 2023 (the latest available). This is based upon assumptions by Experian in regard to the sourcing of on-line food purchases (i.e. the proportion which is actually supplied from the shelves of stores vs. deliveries from non-retail distribution centres to private residences).

Total Convenience Goods Expenditure (Table 2d)

7.19 Table 2d of **Appendix 5** combine population and per capita expenditure estimates to establish total available convenience expenditure respectively within the Study Area. Table 2d shows that there will be approximately £170m convenience goods expenditure within the Study Area at our test year in 2026. For the Zone1 this figure would be £68.79m at the same test year.

Convenience Goods Shopping Patterns (Table 3)

7.20 Table 3 of **Appendix 5** uses the household survey data undertaken by NEMS. This raw data is divided across the 4 Zones, with answers for 'internet spending' and 'don't knows' removed given that special forms of trading have already been extracted from the expenditure totals.

Convenience Goods Shopping Patterns (£m) in 2023 and 2026 (Tables 4 and 5)

7.21 Tables 4 and 5 undertake the conventional process of applying the total convenience goods expenditure for each postcode sector to the 'main', 'second choice main', 'top-up (main)', 'top-up (second choice)' convenience goods shopping patterns as established by the household telephone shopper survey. The split between main food and top-up shopping was directly informed by answers to question 12 of household survey.

7.22 As has already been explained, the postcode sectors contained in Zone 1 comprise the PCA of the proposed Aldi store and is from where the vast majority of the development's trade will be drawn. Accordingly, this zone forms the main focus of our analysis, and our key observations on the convenience goods shopping patterns within this area are as follows:

- Zone 1 retains **84%** (£58m in 2026) of the convenience goods expenditure generated by population. Therefore only **16%** (£22.5m) leaks elsewhere. This is primarily outwith the Study Area (£7.6m / 11%) but with £2.9m leaking to Zone 2, covering parts of Neath;

- Zone 1 receives good levels of inflow primarily from Zone 3 (comprising Cwmafan, Pontrhydyfen, Bryn and Margam) of approx **£22.9m** in 2026, with smaller levels of inflow from Zone 2 (**£4.8m**) and Zone 4 (**£3.3m**);

- The household survey found that Port Talbot Town Centre is performing well, with **£35.1m** overall convenience turnover. The Tesco store in particular has a turnover of **£29.3m**;

- Commercial Road District Centre is attractive for the local population, with an overall turnover of **£15.1m**, with the Aldi store located within the centre providing the majority of this trade (**£14.2m** in 2026);

- Elsewhere in the catchment, the Morrisons store has a turnover of **£23.3m** and the Lidl store **£8.7m**; and

- A small level of convenience expenditure (**£300k**) leaves Zone 1 to use the Aldi store at Maesteg, **£100k** at the Aldi store in Swansea, in addition to **£700k** at the Lidl store at Cadoxton, Neath. These represent opportunities to reclaim a proportion of this lost expenditure.

Existing Convenience Goods Shopping Patterns for Primary Catchment (£m) in 2026 (Table 6)

7.23 Table 6 uses the findings from Table 5 to establish shopping patterns for the primary catchment area. As previously described, this found that 84% of resident's expenditure is retained locally, with the majority of the remainder leaving the Study Area £7.6m (11.1%). £2.9m (4.2%) also flowed to Zone 2.

Foodstore Benchmark Turnover Analysis (2026) + Capacity/Need (Table 7a +7b)

7.24 In Tables 7a and 7b the extent of retail capacity in the catchment is examined in detail. Table 7a firstly considers the turnover of the main foodstores within Zone 1 from the household survey.

7.25 As mentioned above, this found that the Tesco store within Port Talbot Town Centre was performing well, with survey derived turnover of **£29.3m** in 2026. Overall, Port Talbot Town Centre had a turnover of **£35.06m**. This was then compared with company average turnovers, using the net convenience sales floorspace for the various store and multiplying this by the sales density per sqm information from Global Data 2021. These figures were grown to 2026 using projections from the Experian Retail Planner Briefing Note February 2023.

7.26 Overall, this found that the Town Centre is overtrading by some **£6.91m**, with the Tesco store itself overtrading by **£6.52m**.

7.27 For the Commercial Road (Taibach) District Centre, there are also clear signs of overtrading with the Aldi store mainly causing this. For the small size of store at Taibach (this is an old store), the Aldi would be expected to have a turnover of **£8.76m** but the household survey has shown it has a turnover of **£14.24m**, meaning the store is trading at **163%** of expected levels. This is a clear sign of a qualitative need within the area given the popularity of that store. It is apparent the Taibach store is struggling to meet consumer demands, with resulting negative impacts on shopper experience. This overtrading is in line with many national findings on Aldi's growth in market share over the past decade, only being further exacerbated by the cost-of-living crisis.

7.28 Elsewhere within Zone 1, the out of centre Lidl store is trading about its average level with a turnover of **£8.7m**. The household survey did however show that both the Iceland: Food Warehouse and

Morrison's stores weren't performing as well. As all of these stores are located in out of centre locations, these findings are of less concern for the considerations of trade diversions for the application proposals.

7.29 Collectively, there is a modest deficit in terms of trading performance of stores versus their expected benchmark levels. This is largely a result of the poor trading of the Morrison's and Iceland: Food Warehouse stores. If those out of centre stores are not considered, there would be **£10.42m** of expenditure available as a result of the overtrading identified earlier. We note this is a similar turnover to that of the application proposals.

7.30 As part of the capacity assessment, it is also important to recognise the inflow that would take place within the Port Talbot area as a result of spend from elsewhere in the Council area entering Zone 1 and also from visitor/tourist spend. This is considered further in Table 7b.

7.31 Given the principal focus of the household survey was on Zone 1 and immediately surrounding areas, this did not capture any additional spend that enters this zone from the wider Council area. We know that this exists, based on the findings of the NPTRS. As mentioned earlier, that report noted "*Beyond these zones, Port Talbot has a much smaller market share in Zones 1, 4, 6, 7 and 8."* From that older survey, Table 5 at Appendix C, showed that **£5.1m** entered Zone 1 from those areas. Bearing in mind that was for 2012 and in 2010 prices, it is clear that this would have increased to some degree by the base and test years. We have therefore adopted a relatively modest figure for inflow from the wider Council area (beyond our household survey) to account for this. We note there has not been a substantial change in retail offer since that survey that hadn't already been accounted for and so believe it is reasonable to include these figures within the capacity calculation.

7.32 It is also the case that there would be inflow from beyond the Council area that would further boost the turnover of stores. In Table 9c (Appendix C) of the NPTRS, it was concluded that there would be a further 5% of the turnover of stores that entered the area as a result of pass-by trade/tourists etc. We have therefore accounted for those increases in terms of our calculations of need and capacity.

7.33 Overall, we conclude in Table 7B, that including all stores results in available capacity of **£5.22m** in 2026. However, if out of centre stores (which are underperforming) are removed from the tables, there is a clear capacity of **£15.64m**. We note that this latter figure is considerably more than the turnover of the proposed store.

7.34 In conclusion, it is clear that there is quantitative capacity within the catchment area to accommodate further floorspace. If it is considered that the former figure should be used when calculating retail need, we note that this is lower than the turnover of the proposed Aldi but that, based on the impact findings to be discussed later, the new store can be accommodated without significant adverse impact upon any protected centre. It will also fulfil a number of significant qualitative needs.

7.35 Bearing in mind that there is no policy requirement to demonstrate 100% expenditure capacity, we consider that there are important reasons to support the proposed development. We are aware from past Council decision-making for the approval of the ASDA store at Ystalyfera and Iceland: Food Warehouse at Baglan (P2017/0516) that the case was similar. We therefore are of the view that the proposals can be supported based on the quantitative need that has been identified, in addition to qualitative need considerations.

7.36 The significant qualitative need for the development will be set out in more detail below.

Assessment of Qualitative Need

7.37 As noted earlier, PPW sets out a list of considerations that can be relevant as part of a qualitative assessment at paragraph 4.3.16. These will be considered in turn below.

Supports the objectives and retail strategy of an adopted development plan or the policies in this guidance;

7.38 The application site benefits from a planning history where retail development was supported in the past and in fact, construction for retail uses was commenced. The site is located within an area close to the town centre, with a mix of uses present, including residential, who will benefit from close proximity to a discount foodstore offer. The LDP’s strategy to support job creation, improved sustainability (through reduced travel) and regeneration of brownfield land would all be supported by these development proposals.

Site is highly accessible

7.39 The proposed site sits within a built-up residential area with a substantial local population and the ability for visitors to walk to the proposed new store. The proposals include attractive routes to navigate through the site and offers cycle parking spaces to encourage travel through more sustainable means. In addition, the site is close to bus stops allowing public transport usage to access the store. Finally, it is notable that if visitors to the store do arrive by car, they will have options to charge vehicles via the EV bays and will be close to the wider town centre thereby offering an increased opportunity to link their trip. The proposed store location is therefore considered to be an even more sustainable option than Aldi’s existing over-trading store at Taibach (Commercial Road District Centre).

Contributes to a substantial reduction in car journeys

7.40 As noted above, the site offers strong sustainability credentials given its location, the ease of access available by walking, cycling or public transport. The inclusion of EV charging bays will also support more environmentally friendly car journeys, with the car park ducted to allow for more to be installed as take up of the technology increases over time. By diverting trade from more distant locations, including the current overtrading Aldi store at Taibach, which is in a less sustainable location than these proposals, there will be an opportunity to reduce car journeys through these development proposals. It is therefore apparent that the proposals will also satisfy this criterion of PPW in terms of qualitative need considerations.

Contributes to the co-location of facilities

7.41 The proposals are located in an area with a substantial walk-in residential population ensuring the local community can easily access the store. The co-location with the Starbucks coffee house will provide a facility that can benefit from shared linked trips but is also in close proximity to the wider Port Talbot Town Centre allowing for a degree of shared visits to each area.

Assists in the alleviation of over-trading

7.42 The tables above demonstrate that there is a degree of overtrading at a number of stores within Zone 1. This includes the Tesco store, within Port Talbot Town Centre and also the Aldi store at Taibach.

7.43 Whilst a strong trading performance is not usually a cause for concern, when foodstore provision is insufficient to meet local needs, this can lead to operational issues and a poor customer experience at existing stores. Operational issues that can arise include empty shelves due to insufficient stock to meet demand; queuing at check outs due to insufficient check out space; and localised traffic, congestion and parking issues, where car parking provision is insufficient to meet demand.

7.44 The fact that Aldi are seeking to deliver a second store in the area is a sign that the current store is unable to fully satisfy the level of demands for their offer, with this increasing in recent years due to growing popularity (evident in market share growth nationally) but also more recently, due to the cost-of-living crisis. Approval of these planning application proposals will assist to divert trade from a range of locations that are currently overtrading, include the existing Aldi store at Taibach, allowing it to trade at the levels it was designed to, improving its overall operational efficiency, and enhancing the consumer experience as a result.

7.45 In light of this there is a clear qualitative need for the development proposals.

Addresses locally defined deficiencies in provision in terms of quality and quantity

7.46 It is clear from the overtrading evident in the household survey that residents living within all of the zones surveyed within or near to Port Talbot are currently using the Aldi store at Taibach forcing shoppers to have to cross town to reach this store. The only other discounter within Port Talbot is the Lidl store at Baglan Industrial Park, with both that store and the Aldi being approx. 2km from the residential neighbourhoods near Afan Away. Providing a closer facility would have obvious and clear benefits in terms of improving the quality and quantity of low-cost discount convenience shopping for this part of Port Talbot. It would also bring a discount foodstore closer to Port Talbot Town Centre offering wider benefits in terms of generating linked trips and meet the needs of communities in the Aberavon area.

Alleviates a lack of convenience goods provision in a disadvantaged area.

7.47 The Indices of Multiple Deprivation (IMD) are a dataset which is widely used throughout the UK. It is based on small parts of a geographical area, which are used to classify the relative deprivation of each. They are calculated based on a variety of strengths and weaknesses to create an overall weighting. These criteria include employment, health, education, housing provision and access to services.

7.48 The most recent Index for the area was prepared in 2019 by the Welsh Government, referred to as the Welsh Index of Multiple Deprivation (WIMD). This ranks all small areas within Wales from 1 (most deprived) to 1,909 (least deprived). The WIMD then identifies which decile (10%) each area falls into with 1 being most deprived and 10 being least deprived.

Site Specifics

7.49 The map below is an extract from the WIMD 2019 for Port Talbot, showing deprivation levels. As per the key also included below, it is clear that the vast majority of Port Talbot falls within the highest levels of deprivation, particularly close to the application site, as shown by the various red colourings.

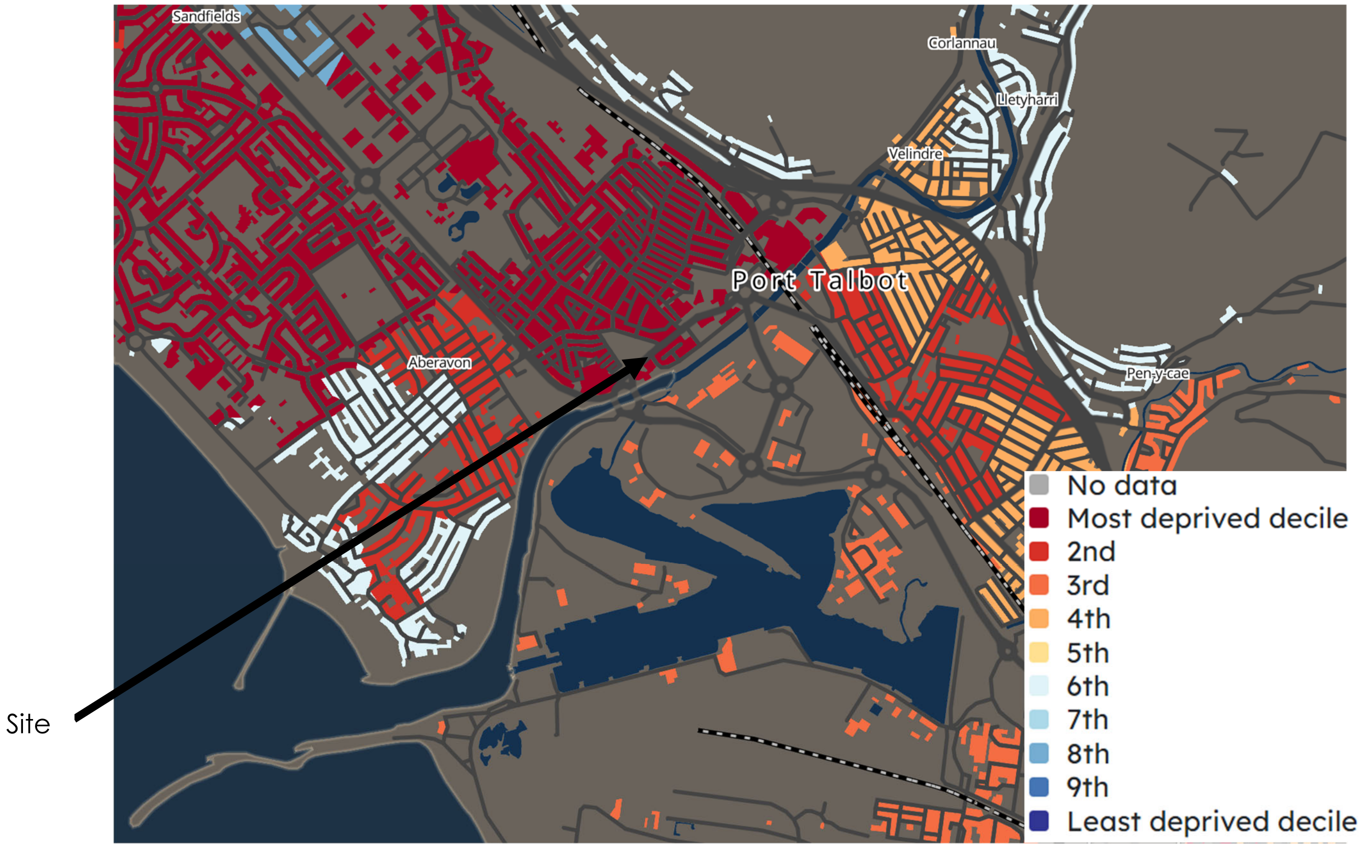


Figure 3: Map showing Welsh Index of Multiple Deprivation

7.50 Turning to the application site itself at Afan Way, there are seven areas which are immediately adjacent, with four of these being identified as falling within the most deprived decile (lowest 10%) of all areas. A further one area falls within the 2nd most deprived decile (lowest 20%), with one area falling within the 3rd most deprived decile. The final area falls within the 6th decile. It should be noted that the application site falls within the area of Aberavon 4, which is ranked as 44th lowest (out of 1909) areas within the whole of Wales and is therefore one of the most deprived areas within the country.

7.51 The above data is summarised in the table below, with the area this application proposal lies within highlighted:

Area	Overall Decile	Overall Ranking *(out of 1909 areas)*	Employment Decile	Employment Ranking *(out of 1909 areas)*	Education Decile	Education Ranking *(out of 1909 areas)*
Aberavon 2	1st	122	1st	103	1st	136
Aberavon 3	1st	129	1st	176	1st	75
Aberavon 4	1st	44	1st	27	1st	72
Sandfields East 1	1st	132	1st	63	2nd	248
Sandfields East 3	6th	1092	5th	806	5th	807
Sandfields East 4	2nd	348	2nd	216	2nd	365
Margam 1	3rd	500	3rd	520	3rd	456

Note – lower numbers indicate worse performance

7.52 Based on this information, the areas immediately surrounding the site appear to suffer from lower employment and education levels. The lack of employment suggests that household budgets are limited meaning that residents would benefit from easier access to low-cost supermarket offer like the application proposals can deliver.

7.53 In this respect, it is noted that the closest discount retailers to the application site are as follows:

Retailer	Walking Time/ Distance	Public Transport Time/ Distance
Lidl, Baglan Way	26 Minutes, 1.3 miles	20 minutes travel – bus runs every 60 minutes, but still requires a walk of 0.8 miles taking 17 minutes.
Aldi, Commercial Road, Port Talbot	29 Minutes, 1.5 miles	14 minutes travel. Bus runs every 60 minutes but still requires 0.8mile walk taking 16 minutes.

7.54 Given the above information, it is clear that the proposals would assist to provide qualitative benefits by enhancing access to affordable goods in a convenient location, specifically for those who do not have car ownership. The proposals would therefore help satisfy this clear qualitative need.

Summary

7.55 The findings of the retail tables indicate that Port Talbot is an attractive convenience shopping destination, with stores located in the Town Centre and Commercial Road District Centre performing strongly. Largely due to the inflow of trade particularly from the wider Council area, there is capacity of between **£5.22m** and **£15.64m** in 2026 to accommodate further retail provision and so a quantitative need for the proposals. Through this planning application, this would be located on a site with a long-established planning history for unrealised retail development.

7.56 In addition to the above, it is apparent that there is a clear qualitative need too, with the proposals meeting a number of the criteria set out in PPW linked to improving access to convenience provision in a disadvantaged area, alleviating overtrading and helping to reduce car journeys at a location which is highly accessible for the local community. The proposals will therefore satisfy both aspects of the need test in conformity with PPW.

8. The Sequential Test

Introduction and Context

8.1 Policy R3 of the Neath Port Talbot Local Development Plan and Paragraphs 4.3.18 to 4.3.24 of Planning Policy Wales (PPW) (2021) require that the sequential approach to site selection is applied to all proposals for *'main town centre uses'* on sites that are not 'in' an existing centre nor allocated in an up-to-date development plan. Further advice on the sequential test and its application is also provided by Technical Advice Note 4: Retail and Commercial Development (TAN4).

8.2 In this instance, the nearest defined centre is Port Talbot Town Centre, located to the north-east of the planning application site. As the application scheme is evidently more than 300m from this town centre (the closest defined centre) it must be classified as an '*out-of-centre*' development opportunity in town centre policy terms. It is therefore necessary to assess '*in*' and '*edge-of-centre*' alternatives. It is also necessary that any site assessed which is not within a town centre is *"accessible by a choice of travel modes, including active travel and public transport*", as required by PPW. This applies to '*edge of centre*' and '*out of centre*' sites.

8.3 It is clear that the planning application site is situated on an accessible site, given the proximity of bus stops and pedestrian accessibility from adjacent housing. It is also noted from the planning history of the site includes that a retail use has been approved here previously indicating its previous acceptability for this form of use.

Scale and Form of Development, Catchment Area and Centres Assessed

8.4 Whilst both the Council's LDP and PPW are silent on the appropriate area of search for sequentially superior sites, the English Planning Practice Guidance ('PPG') identifies that a conventional approach is to consider the extent of the catchment area likely to be served by the proposal and then to identify alternative sites, located within or on the edge of existing centres which serve an equivalent catchment, and which could accommodate the scale and form of development proposed. In the context of these proposals, the catchment is discussed in section 7 of this report.

Scale and Form of Development

8.5 In this instance, the scale and form of retail development is a discount foodstore of 1,931 sq. m GEA (1,344 sq. m net sales), a drive through coffee shop of 188 sq. m GEA alongside requisite customer car parking (145 spaces total, comprising 117 serving the foodstore and 28 serving the coffee shop/ drive thru), vehicular access roads, servicing area, and associated hard and soft landscaping. This is located on a site of 1.2 hectares (2.9 acres), with the proposed foodstore requiring a site area of 0.95 hectares

(2.3 acres) and the coffee shop with drive thru requiring a site area of 0.26 hectares (0.64 acres). Accordingly, it is necessary to define an area of search for sequentially preferable sites based purely on the specific trading characteristics of a mixed-use development of this size.

8.6 Whilst this is the case for these proposals, there is a minimum floorspace and associated development which these proposals require, and it is these characteristics have been used as the basis for this sequential assessment. This comprises:

Retail Store:

- A Gross internal area of 1,805sq.m, allowing for a net sales area of 1,344 sq.m, of which 1,075 sq.m comprises convenience sales.
- Customer Parking of at least 100 spaces.
- A minimum site area of 2.0 acres (0.8ha).

Coffee shop (with drive thru):

- A gross external area of 188 sq.m.
- Customer Parking of at least 20 spaces.
- Ability to deliver a drive thru lane around the store.
- Site area of at least 0.6 acres (0.26 ha).

Primary Catchment Area

8.7 The establishment of a catchment area for the sequential test must be based on professional judgment, in view of the fact that the Council's Local Plan, PPW and all available planning guidance (i.e. Wales Technical Advice Note 4: Town Centres) are silent on the approach. However, it is worth noting that previously published English Government Practice Guidance1 on the application of the sequential test advises in relation to the 'area of search' for sequential sites that (Paragraph 6.22):

"When considering applications, LPAs will need to consider the extent of the catchment area likely to be served by the proposal, and to then identify alternative sites located in existing centres within the catchment area. This will determine whether sites in other nearby centres may represent more appropriate locations in which to accommodate the scale and form of development proposed" (our emphasis).

8.8 Accordingly, in applying the sequential test in this instance, we have followed this conventional and logical approach of considering the extent of the catchment area likely to be served by the proposal

[1] DCLG Practice Guidance on Need, Impact and the Sequential Approach, December 2009

and then to identify alternative sites, located within or on the edge of existing centres which serve an equivalent catchment, and which could accommodate the scale and form of development proposed.

8.9 The limited size and goods offer of a discount foodstore such as the one proposed means that its catchment area will not be particularly extensive and is unlikely to extend significantly beyond Port Talbot. This is evidently the customer base that a discount foodstore in this location would chiefly serve, given the town's size and population. A discount foodstore the size of Aldi typically targets a catchment population of 15,000 people, as explained on their property website[2]. This represents their *'Primary Catchment Area'.*

8.10 It should be made clear that this five-minute drive-time catchment area is not just some arbitrary distance based on Aldi's commercial preferences, instead it is a reasonable and realistic geographic area from which a foodstore and coffee shop of this size will draw the vast majority of its trade. For example, Aldi's property website is clear[3] that a new discount foodstore requires a catchment population of some 15,000 people. We anticipate that other discount food retailers such as Lidl seek a comparable customer base in view of their equivalently sized format. Based on up-to-date Experian population data, a six-minute drive-time catchment area from the planning application site contains some 15,874 people (Source: Experian 2023). This clearly demonstrates that the size of catchment area defined is sufficient in terms of accounting for the proposed foodstore's sphere of influence.

Centres Assessed

8.11 Within a five-minute off-peak drive-time of the planning application site there are a number of allocated town and local centres. These include:

- Port Talbot Town Centre,
- Commercial Road (Taibach) District Centre,
- Fairway Sandsfields Local Centre;
- Fairwood Drive/Lodge Drive Baglan Local Centre; and
- Pentwyn Bagan Road Local Centre.

8.12 These sites are highlighted on the plans provided at **Appendix 2** of this *Planning and Retail Statement*.

8.13 It is relevant to note, that with the exception of the Town Centre and District Centre, the local centres offer traditional small parades or clusters of units, servicing a small scale, day to day retail need, which mostly serves a walk-in catchment. Given the nature of these centres being located in generally

[2] https://www.aldi.co.uk/about-aldi/property
[3] https://www.aldi.co.uk/about-aldi/property

residential areas which are already built out, there are very limited *'in centre*' or '*edge of centre*' opportunities available to consider.

8.14 In line with both local and national planning policy it is therefore appropriate to assess whether there are any sequentially preferable alternative sites within or on the edge of all of the centres identified above as part of the sequential test's application.

Summary (Scale and Form of Development, Catchment Area and Centres Assessed)

8.15 Drawing the above together, in this case a logical area of search for sequentially preferable sites should encompass '*in-centre*' and '*edge-of-centre*' opportunities within (and immediately surrounding) the centres identified above). Any site must also be accessible by a range of transport means, as required by PPW. Within the defined area of search, candidate sites must be able to accommodate (as a minimum) an Aldi discount foodstore and its associated car parking, access arrangements and hard and soft landscaping, alongside the ability to deliver a drive thru coffee shop with its associated access and parking – as this is the scale and form of development that is proposed. A site will be considered sequentially preferable where it is '*suitable'* and '*available'* which necessarily includes consideration of deliverability / viability.

8.16 Whilst in this case the total site area is 1.2 ha it is necessary for applicants and Local Planning Authorities to demonstrate 'flexibility' in their approach, in-line with the relevant section of PPW. Accordingly, this policy requirement and relevant legal / appeal precedents are examined in detail under the following headings.

The Requirement to Demonstrate Flexibility / Legal and Appeal Precedents

8.17 Paragraph 7.5 of the TAN4 requires applicants and Local Planning Authorities to demonstrate 'flexibility' on issues such as format and scale when considering sites in, or on the edge, of existing centres as part of applying the sequential test. Whilst no indication as to what degree of flexibility is required is contained within TAN4, PPW, the LDP or indeed the English Planning Practice Guidance (other than 'format and scale') the 'Rushden Lakes' Secretary of State ('SoS') Call-in decision[4] (which post-dates their original publication) has clarified the position, with the Inspector (Paragraph 8.49) highlighting that 'flexibility' concerns matters including *"flexibility in a business model, use of multi-level stores, flexible car parking requirements or arrangements, innovative servicing solutions and a willingness to depart from standard formats".* In Paragraph 15 of the decision letter, the SoS agrees with the Inspector that these are issues of principal relevance in demonstrating flexibility.

[4] Land Adjacent Skew Bridge Ski Slope, Northampton Road, Rushden; Inspectorate Ref. APP/G2815/V/12/2190175; 11 June 2014.

8.18 This important Call-in decision has also provided clarity on whether there remains a requirement to consider 'disaggregation'[5] when demonstrating flexibility as part of the sequential test. The Inspector is quite clear at Paragraph 8.47 of his report that *"there is no longer any such requirement stated in the NPPF"* and that *"had the Government intended to retain disaggregation as a requirement it would and should have explicitly stated this in the NPPF"*. In Paragraph 16 of the decision letter, the SoS agrees with the Inspector that there is no requirement to consider disaggregation when applying the sequential test. This approach has been followed in subsequent cases (see below).

8.19 A final matter of seminal importance when considering 'flexibility' and indeed interpreting the sequential test more widely is the *Tesco Stores Ltd v Dundee City Council ('Dundee') Supreme Court Decision (2012)*. In summary, this establishes that:

a. if a site is not suitable for the commercial requirements of the developer in question, then it is not a 'suitable' site for the purposes of the sequential approach; and,

b. that in terms of the size of the alternative site, provided that the applicant has demonstrated 'flexibility' with regards to format and scale (explained in the paragraph above), the question is then whether the alternative site is suitable for the proposed development, not whether the proposed development could be altered or reduced so that it can be made to physically fit the alternative site.

8.20 The implications of the Dundee decision were also considered by the SoS as part of the 'Rushden Lakes' Call-in decision. In Paragraph 15 of the decision letter, the SoS agrees with the Inspector that the sequential test relates entirely to the application proposal and whether it can be accommodated on an actual alternative site. In other words, the Dundee decision clearly applies to the NPPF in England and PPW in Wales.

8.21 Two further relatively recent High Court decisions[6] have also considered (inter alia) the sequential test and confirmed the importance of demonstrating flexibility on issues such as format and scale. A developer's own intentions may be taken into account and have a bearing – for instance when considering what demand a proposal is intended to meet. However, the sequential approach should be 'operator blind' and not become a self-fulfilling activity and divorced from the public interest.

8.22 Specifically, in *Aldergate Properties Limited v Mansfield District Council [2016] EWHC 1670 [Admin]* the judgement emphasised that in considering how to apply 'suitability' and 'availability' the general meaning would be that a site should be *"…'suitable' and 'available' for the broad type of development which*

[5] Consideration being given to the separation of a retail scheme across a number of sequentially superior sites.
[6] Warners Retail (Moreton) Ltd v Cotswold District Council (2016) and Aldergate Properties Ltd v Mansfield District Council (2016).

is proposed in the application by approximate size, type and range of goods. This incorporates the requirement for flexibility in [24] NPPF, and excludes, generally, the identify and personal or corporate attitudes of an individual retailer…." (Paragraph 35 of Judgement).

8.23 Whilst the above deals with flexibility for larger retailer developments, we also consider that it is necessary to consider opportunities for flexibility in terms of drive thru elements.

8.24 In this respect, an appeal case in England (ref. APP/00830/A/05/1182303) considered the suitability of town centre locations for drive thru developments. Within the decision notice, the Inspector stated:

"It is difficult to envisage how a developer could be flexible in respect of the format of a drive thru restaurant. Unlike a conventional restaurant, which could be easily accommodated on any of the identified sites, a drive thru, by definition, requires vehicular access and circulation through and around the building."

8.25 A similar position was taken in another appeal decision in England, with reference APP/Q1255/A/08/2061585, which further reinforces the position on flexibility.

8.26 In summary, whilst it is necessary for applicants to demonstrate 'flexibility' on issues such as format and scale when applying the sequential test, it is clear that under the development plan there is no requirement to consider 'disaggregation' nor to explore changes that would materially alter the application proposal such that it no longer met commercial requirements (i.e. a material reduction in size). These matters have been considered as part of numerous 'call-in' and appeal decisions[7] which whilst based on policy for England we consider are still relevant to consider for proposals in Wales. This is because the SoS / Planning Inspectorate clearly draw heavily on the key caselaw referenced in this section when interpreting the sequential test (and specifically the requirement for disaggregation).

Flexibility in the Context of the Application Proposals

8.27 Aldi recognises the need for 'flexibility' in promoting sites for development and the retailer pursues non-standard stores where this will assist in meeting planning policy requirements. When considering the scope for flexibility, however, the inherent nature of Aldi's operation as a 'deep discount' food retailer must be borne in mind. Accordingly, there are a number of key areas where it is not possible to alter the core design of the store; as to do so would undermine the operational efficiency of the business model and hence its viability.

[7] See for example: APP/P0119/V/17/3170627 - The Mall, Cribbs Causeway, Patchway, South Gloucestershire BS34 5DG (October 2018); APP/T3725/W/18/3204311 - Leamington Shopping Park, Tachbrook Park Drive, Warwick, CV34 6HR (March 2019); and, APP/R0660/V/17/3179610, APP/R0660/V/17/3179605 and APP/R0660/V/17/3179609 - Land at Earl Road, Handforth Dean, Cheshire, SK9 3RW (June 2019).

Foodstore

8.28 The fundamental requirements of a modern Aldi foodstore's design and layout are therefore as follows:

- **Retail Sales Area:** This is the most important aspect of store building design. A circa 1,300 sq. m floor area is required to provide approximately 2,000 core product lines, and the dimensions of the retail area are determined by the need to ensure adequate product display space is provided. The rectangular shape of the retail sales area is also specifically designed to enable efficient transfer of products. In view of its critical importance to the trading and operational success of Aldi's business, the size and proportions (shape) of net retail floorspace is one area where it is not possible for Aldi to depart from their core design, as to do so would undermine trading viability. Such a configuration is coincidentally an optimum solution to enable shoppers to shop whilst respecting social distancing and cannot reasonably be reduced.

- **Storage and Ancillary Non-Retail Floorspace:** Where the size and shape of a particular site requires reconfiguration, Aldi can exhibit flexibility, such as compromising service and storage facilities. However, the foodstore must be capable of being serviced by a HGV delivery vehicle and the Site layout must enable the delivery vehicle to enter and leave in forward gear, and for the vehicle to be able to dock correctly and safely in the purpose-built delivery area of the store (a dock-leveller).

- **Customer Car Parking:** Aldi foodstores are required to have immediately adjacent surface-level car parking facilities. This is because an Aldi foodstore's primary function is to cater for 'bulk' food shopping needs and therefore very many customers will be visiting to undertake a 'weekly' shopping trip, involving several heavy shopping bags. Customers may also be visiting to purchase a product from Aldi's non-food 'special buy' range which could be large / heavy and therefore unmanageable on foot. Accordingly, it is a pre-requisite that most customers have the opportunity to take their goods home via private car, irrespective of the accessibility of the store location via sustainable modes of transport, for those undertaking smaller basket shopping.

8.29 In light of the above, with regards the application of 'flexibility' to the planning application scheme when applying the sequential test, the following is proposed:

- The net sales area and gross external floor area of the store could be reduced as a minimum to 1,140 sq.m and 1,674 sq.m respectively.

- The 117 car parking spaces could be reduced to only around 100 spaces – which is Aldi's minimum requirement for their current foodstore format.

8.30 Based on the above identified areas where 'flexibility' can be demonstrated in relation to the proposed retail store, it is considered that a site area requirement could be reduced to **0.7ha** (reduction of 26%), which is regarded as the minimum realistically necessary to accommodate a discount foodstore of 1,674 sq. m GEA and its supporting site infrastructure (i.e. customer car parking, vehicular access/egress, servicing area, pedestrian circulation space and basic landscaping).

Coffee Shop (with drive-thru)

8.31 For the coffee shop unit, the following is required:

- **Gross Floor Area**. A circa 190 sq.m floor space unit is required. This provides sufficient space internally for the coffee shop operation to service sit-in customers, as well as those in vehicles at the drive-thru. An element of back of house function is also required including space for customer WC's and storage.

- **Car Parking**. Customer parking is required for those visiting the coffee shop via vehicle. To accommodate this element, at least 20 parking spaces are required to be provided.

- **Drive Thru Lane**. By the very nature of the proposals, it is necessary to provide a drive-thru lane around the proposed unit. This therefore requires a vehicular entrance into the site.

8.32 Based on the above identified areas where 'flexibility' can be demonstrated in relation to this specific scheme, it is considered that a site area requirement could be reduced to 0.21ha (reduction of 20%), which is regarded as the minimum realistically necessary to accommodate a drive thru of the above size and its supporting site infrastructure (i.e. customer car parking, vehicular access/egress, drive thru lane and basic landscaping).

8.33 Collectively, this would mean a minimum requirement would be a site area of **0.91ha**, with the ability to offer some main road frontage (i.e. commercial profile), adequate car parking and servicing areas and convenient access. These will be taken on board as part of the full assessment below.

Conclusions

8.34 In summary, measures have evidently been taken in the design of the scheme to maximise 'flexibility' in terms of the scale and form of the development proposed. Notwithstanding this, for the purposes of the sequential assessment, the applicants have tested a considerably smaller site area than is actually proposed for this planning application. Thus, the applicants are clearly demonstrating 'flexibility' in line with the PPW's requirements.

Sequential Site Assessment

8.35 Having established the appropriate catchment area, the centres to be assessed within it, and the scale and form of commercial development to be tested (having regard to flexibility); this analysis now turns to consider any candidate sites which are potentially 'suitable' and 'available'. A detailed Sequential Site Assessment Summary Schedule is set out at **Appendix 6 which covers each of the 3 sites identified in detail**. However, we briefly summarise the position in relation to each below:

Table 1 – Summary sequential site analysis

Site	Summary
Site 1 – R1/2 Glanafan Comprehensive School, Port Talbot	The site extends to 0.8 hectares and is located partly within the town centre of Port Talbot. It therefore represents an in-centre opportunity in retail planning terms. Furthermore, the site is allocated as a redevelopment opportunity under policy CCRS1/2 and as a retail allocation under policy R1. The site has recently been fully redeveloped for residential development across the eastern part, and conversion of a listed school building to the west has taken place with two small commercial units at ground floor and residential uses above. These units are currently occupied but neither is of an appropriate size or physical location to accommodate either part of the proposed development. Due to the site size it is clear that it is too small to accommodate the development proposed by this application, even with the flexibility shown. Given the above, the site cannot be considered either '*suitable'* or '*available'*. It subsequently cannot be considered a sequentially preferable alternative to the application site and is dismissed on this basis.
Site 2 – R1/3 Harbourside	At c. 47 hectares the site could potentially be of a size capable of accommodating the proposed development. However, a number of areas of the site are currently occupied by alternative uses and it is unlikely they will be available within a reasonable timeframe. Firstly, it is notable that the site is specifically allocated for bulky comparison use only. This is set out within the LDP at paragraph 5.2.41. This paragraph continues that *"The retail development will be expected to be as near as possible to the town centre. At present there is poor connectivity to the town centre and as part of any development proposal the linkages will have to be improved and measures put in place to overcome the physical barriers (including the roads and railway lines) in order to ensure integration and linked trips to the town centre."* A number of the sites within the overall allocation are already occupied by major industrial uses. This includes the only site to the north-west of the allocation that would potentially be within 300m from the town

Site	Summary
	centre boundary. The importance of good connectivity is stressed within TAN4 where it states the requirement to consider physical barriers in assessing sites. It is apparent that the connections between this site and the town centre are very poor due to the presence of the dual carriageway and railway line. With these barriers in mind, it is highly questionable if any site meets the definition of 'edge of centre' as set out within the TAN guidance. These barriers are also noted within the LDP. We therefore consider that this location involves a circuitous route which we consider would not encourage linked trips. As a result, we do not consider it to be sequentially preferable over the application site as is technically an 'out of centre' site. PPW is clear that any edge of centre or out of centre site should be accessible by a range of transport modes, including public transport, for it to be acceptable. We note that there are currently no bus stops located within or close to the site, and as such the site does not meet this criterion. There are also questions over the availability of the site, with no evident marketing of this part of the allocation given the range of occupiers present. Given the presence of these parties it is highly unlikely that the site would be available for development in the next few years. In conclusion, we do not consider the site to be sequentially preferable alternative to the application site and that it is unavailable for development. It can therefore be dismissed on this basis.
Site 3 – Land at Baglan Primary School	The site is open space associated with Baglan Primary School, extending to 1.23ha. it is located within a 250m walk to the nearest local Centre of Fairwood Drive/Lodge Drive, Baglan. As such, the site represents an 'edge of centre' opportunity in policy terms. The site lies to the very north of the proposed catchment outlined for these proposals, and therefore the proposals at this location would principally serve a different catchment. Within the LDP, policy OS2 states that: *"Any proposals which would result in the loss of an existing area of open space will only be permitted where it can be demonstrated that:* *1. The open space is no longer needed; and* *2. There is no shortfall of provision of that category of open space in the ward, before or as a result of the development; and* *3. The site would not be suitable to provide an alternative type of open space for which there is a shortfall. Or:*

Site	Summary
	It can be demonstrated that equivalent or enhanced facilities can be provided on a suitable and accessible replacement site which would serve the local community equally well." In terms of these tests, it is clear that the open space is well used by the local school and surrounding community. It would also not be possible to satisfy criterions 2 and 3 of the policy. Finally, it would be impossible to deliver alternative facilities within the local area, given the lack of sites available. The proposals would therefore be contrary to planning policy. Furthermore, there are queries over the availability given the open space is associated with an existing primary school. Given the above, the site can therefore be discounted as a sequentially preferable opportunity.

8.36 The sequential assessment set out above (and in greater detail at **Appendix 6** of this report) has demonstrated that there are no sequentially preferable development sites within or on the edge of any of the centres within the catchment area, which could realistically accommodate the scale and form of development for which planning permission is sought – even when demonstrating significant flexibility in terms of developable area.

8.37 This outcome is not particularly surprising given the physically constrained nature of these traditional centres. These factors severely limit the potential for the expansion of the centres.

8.38 Overall, for the robust reasons outlined in this section of our report, it is considered that there are no sequentially preferable sites within a realistic catchment area for the scale and form of development proposed and compliance can therefore be demonstrated with the sequential approach to site selection as set out in Paragraphs 4.3.18 to 4.3.24 of PPW.

9. The Retail Impact Test

9.1 As outlined earlier, Paragraph 4.3.26 of PPW requires an assessment of impacts for all retail planning applications of 2,500 sq.m gross floorspace or greater if located on the edge of or beyond a designated retail and commercial centre, once a need has been established. Paragraph 4.3.27 confirms for smaller retail planning applications that planning authorities will need to determine whether an assessment if necessary and that requests for impact assessments should be proportionate to potential impacts.

9.2 The planning application is for an Aldi discount foodstore, with 1,344 sq.m net sales. It also includes a Starbucks Coffee Shop with drive thru.

9.3 The proposals include 1,075 sq.m of convenience floorspace with the remainder, 269 sq.m for comparison sales. Given this small scale of non-food floorspace, the impact assessment will focus only on the convenience element. We note the foodstore proposals are significantly below the 2,500 sq.m threshold set out in national policy for requiring an assessment of impacts.

9.4 Notwithstanding the above, a proportionate retail impact assessment has been completed in accordance with Paragraphs 4.3.26 and 4.3.27 of PPW to inform consideration of the application proposals. The findings of this assessment are enclosed within this section and should be read alongside the detailed tables at **Appendix 5**.

9.5 As set out within PPW and TAN4, the following matters will be considered:

- Impact of the proposals on existing, committee and planned public and private investment in a centre or centres in the catchment area;
- The impact of the proposals on allocated sites outside centres being developed in accordance with the development plan;
- Impact of the proposal on in centre trade and turnover in defined centres in the catchment, taking account of current and future expenditure capacity;
- Impact of the proposals on centre vitality and viability, including local consumer choice and range and quality of the comparison and convenience retail offer; and
- Impact on travel patterns over the catchment area.

9.6 In interpreting town centre policy concerning retail impact, it is noteworthy that Paragraph 4.3.25 of TAN4 states that the purpose of the retail impact assessment is to consider these issues and determine if these developments are likely to have detrimental consequences. The implication being that an application that should be refused where any adverse impacts are likely to give rise to detrimental consequences, and that an impact which is merely adverse is not a direct reason for refusal.

9.7 Paragraph 1.18 of PPW confirms a presumption in favour of sustainable development and is clear that permission for development should be granted in accordance with the development plan unless 'material considerations indicate otherwise to ensure that social, economic, cultural and environmental issues are balanced and integrated'. We consider that any adverse impacts that are not likely to result in detrimental consequences are capable of being weighed against positive social, economic, and environmental impacts in the overall planning balance.

9.8 Below we consider the impacts of the application scheme in relation to the range of retail impacts set out in PPW and TAN4 within this section of our report.

Impact on Existing Committed and Planned Investment in Centres

9.9 When assessing impact upon investment it is relevant to consider, the policy status of the investment, the progress in securing the investment and the extent to which an application is likely to undermine the planned development.

9.10 We are not aware of any existing, committed or planned investment that could potentially be threatened by the proposed development.

Impact on Allocated Sites Outside Centres

9.11 Within the adopted Local Development Plan, there are two sites in the catchment area allocated for retail development, as set out under Policy 1. These are Glanafan Comprehensive School and Harbourside. Both of these have been considered as part of the sequential test sections of this report and found to either not be available, suitable or indeed sequentially preferable. These are therefore covered only briefly below.

- Glanafan Comprehensive School – this site has been redeveloped in recent years for a residential use with only a small retail component. The commercial element of the scheme is of a scale that is far too small to accommodate an Aldi store, together with associated car parking and servicing requirements. Given the site has been developed it is clear the proposals would have no impact on this allocated site.

- Harbourside – this site is a major regeneration opportunity covering 47ha of land. The land has a number of current occupiers, related to various industries. A draft 'Port Talbot Harbourside & Town Centre Development Framework' SPG was prepared and consulted upon in 2014 but was never adopted. A range of uses have been designated, comprising residential, business, college and bulky goods retail. We note that the area of land allocated for the bulky comparison use is occupied by a range of users including LBS Builders Merchants, Baglan Builders etc. The availability of the site for development is therefore questionable. In light of this and the type of retail use set out within the adopted Plan it is evident that the proposals would have no impact on these future plans.

Impact on In Centre Trade and Turnover

Assessment of Trade Diversion and Impact

9.12 As explained in Section 7, the proposed foodstore will principally serve a relatively localised catchment area covering Port Talbot, focusing on the town centre and western part of the town, to cater for the population in Aberavon and Baglan.

9.13 We have undertaken a detailed assessment of the likely impacts of the proposed scheme on the trade/turnover of existing centres and stores located within and beyond the catchment area.

9.14 As for our quantitative capacity assessment, our quantitative retail impact assessment focuses on the convenience goods floorspace contained within the discount foodstore (which represents the vast majority of the retail floorspace proposed).

9.15 The amount of comparison goods floorspace proposed within the foodstore is small and is ancillary to the main convenience goods role of the Aldi store. Moreover, much of the comparison goods items sold by the discount supermarket operators are 'special buy' products, which provide a limited, diverse and changing range of promotional comparison goods items. The broad and changing nature of the comparison offer expected to be sold from the small amount of comparison retail floorspace proposed means that any comparison trade diversion associated with the proposed foodstore will be dispersed thinly across a wide range of stores, with no individual store or centre experiencing a material level of trade diversion.

9.16 The potential for an Aldi foodstore to compete with existing town centre comparison goods retailers, which are typically focused on providing a traditional 'high-street' retail offer is therefore extremely limited. It is therefore considered highly unlikely that that the modest amount of comparison retail floorspace within the proposed foodstore would result in a significant adverse impact on the vitality and viability of any centre.

9.17 Our assessment considers the solus impact of the application scheme. We follow a standard step-by step methodology utilising the assessment of quantitative retail capacity set out in Section 7 and at

Tables 1 to 7 at **Appendix 5**, which establishes the turnover of the application scheme, and existing shopping patterns across the Study Area, which encompasses the core catchment area of the proposed foodstore (Zone 1).

Anticipated Convenience Trade Draw to Development and Impact (Tables 8 -11)

9.18 The proposal's convenience goods trade allocation from the various Zones is set out at Tables 8 and 9 of **Appendix 5.** This identifies that 80% of the draw for the store will come from Zone 1, with 15% expected from Zone 3, in light of existing shopping patterns, and 5% from Zone 2.

9.19 The Council's Local Development Plan, PPW and all available planning guidance (i.e. Wales Technical Advice Note 4: Town Centres) are silent on the approach to assessing where the turnover of an application proposal is likely to be diverted from. However, a common starting point for this exercise and the approach endorsed by the English Government is to consider the catchment's existing shopping patterns and to then apportion the trade to be diverted based upon the character of development ('like affecting like'), popularity (based upon existing shopping patterns / Avison Young observations), geographic location (proximity) and brand loyalty factors (i.e. are catchment residents already using Aldi?).

9.20 As the application proposals are centred around a 'main' food shopping destination (a discount foodstore), it stands to reason that the scheme will divert the vast majority of its trade from equivalent 'main' food shopping destinations (i.e. medium / large mainstream foodstores and discount foodstores). This assumption is entirely consistent with the approach advocated within the English Government's Planning Practice Guidance, which confirms that a guiding principle when assessing retail impact is that '*like affects like*' (see PPG Para Ref. 2b-015-20190722).

9.21 Given this advice, our approach has been to have greatest regard to the existing 'main' food shopping patterns in the catchment area when allocating the trade diversion of the scheme. We do not propose to provide an exhaustive list of all monetary diversions within this supporting statement as they are clearly outlined in Tables 8-10 of **Appendix 5**. However, we do provide a commentary on the stores / centres from which the majority of the scheme's trade will be diverted below.

Table 2: Summary of the Solus Convenience Retail Trade Impacts of the Application Scheme at 2026 (Source: Table 10 at Appendix 5)

Destination	Solus Trade Diversion		Total Turnover	Solus Trade Impact
	%	£m	£m	%
ZONE 1				
Port Talbot Town Centre				
B&M, Aberafan Shopping Centre, Port Talbot, SA13 1PB	0%	£0m	£0.73m	0%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	0.8%	£0.09m	£1.87m	-4.8%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot, SA13 1NG	0%	£0m	£0.55m	0%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	20%	£2.37m	£26.94m	-8.1%
Local shops, Port Talbot Town Centre	0.8%	£0.09m	£2.41m	-3.8%
Sub Total Port Talbot Town Centre	**21.6%**	**£2.6m**	**£32.50m**	**-7.3%**
Commercial Road District Centre (Taibach)				
Aldi, Commercial Road, Port Talbot, SA13 1LG	20.8%	£2.46m	£11.78m	-17.3%
Local shops, Taibach local centre	0%	£0m	£0m	0%
Filco, 2-16 Commercial Rd, Port Talbot, SA13 1LG	0%	£0m	£0.93m	0%
Sub Total Commercial Road District Centre	**20.8%**	**£2.46m**	**£12.71m**	**-16.2%**
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot, SA12 7BZ	4.9%	£0.58m	£2.95m	-16.4%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	17%	£2.01m	£6.69m	-23.1%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	17%	£2.01m	£21.32m	-8.6%
Other	0.8%	£0.09m	£1.69m	-5.3%
ZONE 2				
Neath Town Centre				
Local shops, Neath Town Centre	0%	£0m	£0.56m	0%
Morrisons, Angel Street, Neath, SA11 1RS	2.3%	£0.27m	£7.07m	-3.7%
M&S Green Street East Street 16, Neath, SA11 1DH	0.8%	£0.09m	£1.79m	5%
Sub Total Neath Town Centre	**3.1%**	**£0.37m**	**£9.42m**	**-3.7%**
Lidl, Briton Ferry Road, Neath, SA11 1AS	7.4%	£0.87m	£4.16m	-17.3%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	0%	£0m	£1.71m	0%
OUTSIDE STUDY AREA				
Various	7.5%	£0.88m	-	-
TOTAL	**100%**	**£11.84m**	**-**	**-**

Commercial Road District Centre

9.22 Table 10 of **Appendix 5** shows that the greatest convenience trade draw to the proposed foodstore is likely to be from the existing Aldi store located to the east of the catchment given its current draw and likelihood that shoppers would choose their closest Aldi. As identified earlier, the household survey demonstrated that this store is significantly overtrading despite its small size.

9.23 Table 7A showed that based on company average turnover and the scale of retail floorspace, this store should have a turnover of **£8.76m**. It is notable that this store is a first-generation Aldi and so the sales area if noticeably smaller (at 995sq.m) than their more modern offering. The household survey demonstrated it is trading at **163%** of the benchmark levels, with a turnover of **£14.24m**.

9.24 Given it is the same operator and proves an attraction from visitors across Zones 1-4, it is therefore inevitable that the largest diversion **(20.8%)** would come from this destination. However, we note that due to its strong performance, this can be easily absorbed, and we anticipate is likely to lead to a qualitative improvement in the shopping experience at that store. Relieving this pressure, is after all, once of the reasons for the application proposals.

9.25 Table 11 compares the overtrading pre- and post-development in Table 11. This demonstrates that even with the diversion of **£2.46m**, the store would continue to trade at **134%** of company average with a turnover of **£11.78m (i.e. £3m above benchmark)**, with the wider District Centre trading at **116%**. It is therefore clear that the proposals would not have a significantly adverse impact on this destination.

9.26 The diversions from the District Centre also only relate to convenience trade, when the centre offers a range of comparison goods retailers too. In light of this, the actual impact levels would fall further once overall turnover of the centre is considered.

Port Talbot Town Centre

9.27 We anticipate that given the Tesco store's popularity (as the principal convenience destination in Port Talbot) and proximity to the application site, there will be diversion from this location. The household survey revealed that the Tesco superstore is currently performing very well and drawing in trade from all Zones that formed part of the Study. Due to this and the close proximity, we expect that some of those residents that currently shop at this store may now choose to visit the proposed discount foodstore.

9.28 The household survey identified that based on company benchmark, the Tesco is overtrading by **£6.52m** and contributing to Port Talbot Town Centre's overtrading figures. We anticipate that **20%** of the proposed store's turnover would be derived from that source, amounting to **£2.37m**. There is only predicted to be very small diversions from other operators in the town centre though, due to the makeup of those retail facilities which either primarily offer a comparison function, or the limited comparability with the discount food offer provided by an Aldi store. The Iceland store, for example, has a very small offering and as per the household survey, purely serves as a top-up shopping destination, which the proposed Aldi store is unlikely to compete with.

9.29 Given the current overtrading, the impact of the proposals would only be **7.3%**, with the town centre continuing to over-perform compared to benchmark figures at **115%** of expected turnover post the development proposals as identified at Table 11 of **Appendix 5**. Indeed, the diversion levels would only comprise about a third of the additional turnover that the Tesco store currently achieves above their expected benchmark trading levels. We therefore believe this will have no long-term effect on the vitality and viability of the centre and indeed, by drawing in shoppers to the proposed store location, and due to its proximity to Port Talbot Town Centre there may even be added benefits of some linked trip generation, with the town centre as a result.

9.30 It is also important to recognise that this impact focuses purely on the convenience trade of the centre. Port Talbot is a significant comparison retailing destination, which had a non-food total turnover of £48.1m in 2012 (according to the NPTRS). In light of this and if considered as part of the overall impact calculations, it is even more clear that the proposals would not have a significant adverse impact on the vitality or viability of Port Talbot Town Centre.

Out of Centre Stores in Port Talbot

9.31 The remainder of the trade draw from Zone 1, amounting to £4.69m, will be from out of centre stores located elsewhere within Port Talbot. These stores are located to the west of the proposed store location and have also proven popular in terms of the findings of the household survey.

9.32 This includes the Lidl store at Baglan Industrial Park and Morrisons nearby. Collectively, over one third **(34%)** of the diversions for the new store would be derived from those locations given their proximity and due to the ‘like competes with like’ accepted principle. It is notable that these destinations are all located in ‘out of centre’ locations and so not protected by planning policy. At these levels of diversion though, it is clear that the proposals would not affect the long-term viability of these locations.

Beyond Zone 1

9.33 Beyond Zone 1, it is projected that there will be small levels of diversions upon the Morrisons store in Neath (2.3% diversion) and Lidl store at Briton Ferry (7.4% diversion) from Zone 2. The household survey identified that some expenditure from Zone 1 was leaking to those stores, accounting for £0.91m to the Lidl store and £0.97m at the Morrisons.

9.34 There is also expected to be £0.88m diversion from beyond the study area mainly coming from Aldi stores at Maesteg and Neath, the Lidl store at Cadoxton, Neath and other major supermarkets given that £7.6m of expenditure from Zone 1 currently leaves the Study Area (as shown in Table 6).

9.35 Given that some of these foodstores have the same operator as the foodstore proposed, it stands to reason that they will be disproportionately affected by the introduction of a new Aldi at Aberavon. Logic dictates that catchment area residents will be redirected to a newer, more modern, and slightly larger Aldi foodstore which is closer to home.

9.36 Overall, the tables show that we believe that the broad majority of the scheme's turnover will be diverted from the largest, closest and most popular 'main' food shopping destinations. There would also logically be a disproportionate effect on surrounding Aldi foodstores– which the catchment population are already known to use. This is entirely consistent with the English Government's PPG, and the principle that '*like affects like*' when assessing retail impact.

Quantitative Convenience Goods Impact – Conclusions

9.37 Drawing the above points together, it is clear that the trading effects of the retail proposals will give rise to relatively minor convenience retail impacts across the majority of surrounding foodstores and centres located within defined centres. For Port Talbot Town Centre and Commercial Road District Centre, these locations will continue to overperform compared to their benchmark levels even after the development proposals are trading ensuring that their long-term vitality and viability is safeguarded. It is therefore clear that the proposals can be accommodated without any significant adverse impacts occurring within the catchment area.

Convenience and Comparison Goods – Qualitative Impact

9.38 In addition to the quantitative analysis which has been undertaken, there is merit in setting out a number of qualitative factors which underline why an Aldi foodstore in this location will not result in a 'significant adverse' impact on the vitality and viability of any centre in particular:

Aldi's Deep Discount Business Model

9.39 There are some key themes to outline in relation Aldi's business model which are relevant when considering impact upon vitality and viability as a whole:

- Firstly, an Aldi discount foodstore does not represent an 'everything under one roof' shopping destination as is the case with many mainstream foodstores. The retailer will stock their 'own brand' versions of the staple food products that typically comprise a family's weekly shop alongside a very limited non-food offer. This means that mainstream foodstores and other independent convenience retailers will still be relied upon where consumers are seeking mainstream branded goods.

- Secondly, in contrast to many larger foodstores, the proposed Aldi will not include an in-store café, post-office, dispensing pharmacy, dry-cleaners, travel agent, opticians or photo processing. Nor will there be staffed butchery, fishmonger, delicatessen or greengrocery counters. Also, Aldi do not stock tobacco – a staple of many local newsagents. Given this position, a future Aldi shopper will still be wholly reliant upon existing traders in surrounding local centres, for example, for the vast majority of their specialist food retail (i.e. butcher), non- food retail, retail service, and leisure needs. The district centres will therefore retain a strong customer base.
- Thirdly, in terms of Aldi's non-food retail offer, this only accounts for 20% (269qm) of the store's sales area and the range of goods stocked is seasonal and continuously rotated on a 'when it's gone it's gone' basis, with no single product range predominating. Therefore, the potential for impact is very limited; with non-food goods which may cross over with a local trader's offer on sale for only a very limited period, rather than all year-round.

Aldi's Retail Offer and the Local Context

9.40 In addition to the above, it is worth noting Aldi's offer, has most recently won awards from Which? for being the Cheapest Supermarket in the UK. This is particularly relevant given that the proposed store is located within an area which suffers from significant levels of deprivation, with local neighbourhoods, within Aberavon being within the most deprived across Wales[8], as noted earlier.

9.41 With certain parts of Aberavon are within the 44th (out of 1909) most deprived neighbourhoods in Wales, the lack of employment suggests that household budgets are more limited and where residents are most likely to benefit from having close access to a low-cost supermarket.

9.42 Access to high quality, affordable food items, is therefore an important qualitative consideration in support of the proposals.

Overall Implications for Vitality and Viability of Surrounding Centres

9.43 Whilst the preceding section has highlighted that the level of quantitative impact on surrounding centres as a consequence of the development proposals will be relatively low; in considering what this will actually mean for their vitality and viability, it is important to provide a proportionate commentary on their current health, role and function. The implication being that where a centre is in good health

[8] https://data.cdrc.ac.uk/dataset/index-multiple-deprivation-imd

it will be well placed to withstand modest trading impacts without these resulting in a 'significant adverse' impact on overall vitality and viability.

9.44 Accordingly, detailed health check assessments are provided below.

Impact on Centre Vitality and Viability

9.45 In considering impact on centre vitality and viability, we have focused on the following centre (boundaries as defined by the Local Plan):

- Port Talbot Town Centre;
- Commercial Road (Taibach) District Centre;
- Cwmavon Local Centre;
- Fairway Sandsfields Local Centre;
- Fairwood Drive/Lodge Drive Baglan Local Centre, and
- Pentwyn Bagan Road Local Centre.

Health Check Analysis / Impact on Vitality and Viability of Port Talbot Town Centre (Including Local Consumer Choice and quality of the retail offer)

9.46 Our assessment of impact on in centre trade and turnover has highlighted that the level of quantitative impact on surrounding centres as a consequence of the development proposals will be relatively low. However, in considering what this will actually mean for their vitality and viability, it is important to provide a proportionate commentary on their current health, role and function.

9.47 Below we provide a health check analysis of Port Talbot Town Centre, which is the main centre within the catchment area from which we expect trade diversion to the proposed Aldi. We further consider the health of Taibach District Centre, as well a number of local centres.

Port Talbot Town Centre

Centre Overview

9.48 According to Policy SP12 (Retail) of the Neath Port Talbot County Borough Council Local Development Plan (LDP) (2011-2026) (January 2016), the shops and services in Port Talbot are defined as one of three principal Town Centres in the County Borough, alongside Neath and Pontardawe. In addition to offering a variety of retail facilities they also provide a range of facilities and services including employment opportunities, leisure facilities and community facilities. The sub-text to Policy SP12 states that *"a retail hierarchy has been defined which recognises the specific role and function of the current retail offer within* *the County Borough. In line with national guidance, all new retail proposals should form part of, or complement, the retail hierarchy which places town centres first and recognises the more local role of district and local centres. The retail hierarchy aims to direct development to town centres, then district centres, local centres and finally out of centre locations."*

9.49 Port Talbot Town Centre is a compact Town Centre and serves the wider urban area of Port Talbot as well as the Afan Valley. The Town Centre mainly has a linear form, running north-south, with an indoor shopping centre (the Aberafan Shopping centre), and the main shopping area benefits from pedestrianisation. The Town Centre is located approximately 1.5km east of the proposed development site. Convenience goods retailing in the centre is anchored by the Tesco superstore at Upper Station Road. The northern portion of the centre is occupied by Aberafan Shopping Centre, which has a mainly comparison goods sales offer. The mix of uses becomes more varied in the Lower Station Road area, where A2 and A3 uses dominate.

9.50 The Civic Centre offices (which includes The Princess Royal Theatre) and town square are included within the Town Centre boundary and assist by increasing footfall.

9.51 The former site of the Glan Afan Comprehensive School has recently been redeveloped and comprises 1 no. commercial premises accessed via the retained school frontage that is located within the Town Centre boundary and a series of apartments and houses above and to the rear.

9.52 The Town Centre is supported by various off-street car parks; namely the multistorey that links to the Aberafan Shopping Centre, the Tesco surface car park (where parking is free for 2 hours) and the Bethany Square surface car park that stretches in either direction from the Station Road roundabout.

9.53 Based on the fieldwork undertaken by Avison Young in June 2023, the Town Centre was found to contain some 201 units. 8 of the units recorded are convenience businesses.

Diversity of Uses

Convenience Goods

9.54 As Table 3 shows, the centre's convenience sector accounts for just 4% of all units, with 8 convenience stores recorded during the survey. This is below the national average of 9.2%. However, Tesco is the anchor store which offers a main and top-up shopping role. It benefits from a dedicated surface car park that serves the wider town centre. The store also benefits from a petrol filling station, café, bakery, delicatessen, butchers and fishmonger. The store trades from 07:00-22:00 Monday-Saturday and 10:00-16:00 on Sundays.

9.55 Second to this is Iceland Frozen Food located in Aberafan Shopping Centre. This store trades from 08:00-18.00 Monday-Saturday and 10:00-16:00 on Sundays. The store mainly sells frozen foods, including prepared meals and vegetables, alongside non-frozen grocery items such as produce, meat, dairy and dry goods. This is supplemented by comparatively small area devoted to the sale of fruit/vegetables and crisps/confectionery.

Comparison Goods

9.56 The site survey found that comparison goods units comprise 32.8% of the 201 recorded units. This figure exceeds the national average of 26.8%.

9.57 The retail representation is concentrated along Upper Station Road and in the Aberafan Shopping Centre, where most of the national multiples such as Argos, Boots, B&M, Home Bargains and Wilko are located.

Table 3: *Diversity of Uses in Port Talbot Town Centre (surveyed in June 2023)*

Use Type	Number of Units (June 2023)	
	No.	Port Talbot Town Centre
Convenience	8	4%
Comparison	66	32.8%
Service	82	40.7%
Miscellaneous	15	7.5%
Vacant	30	15%
Total	**201**	**100%**

Leisure, Retail and Business Service Uses

9.58 82 of the units within the centre were recorded to be either leisure, retail or business service units. Service units therefore comprise 40.7% of all units within the centre. The majority of these units are concentrated to the southeast of the retail core.

Vacant Units

9.59 30 vacant units were recorded, which accounts for 15% of commercial units within the centre. This is lower than the national average of 17.6%. Whilst there were gaps in the street scene, the vacant units were not clustered, and this level of vacancy did not appear to have a profound impact upon the visual health of the centre.

Miscellaneous Uses

9.60 Alongside retail outlets, the site survey recorded a handful of miscellaneous units. These largely comprise office-based uses interspersed with the shops.

Balance Between Independent and Multiple Stores

9.61 The January 2023 Goad Category Report for Port Talbot identified a total of 62 multiple outlets within the Town Centre, comprising 35 comparison outlets, 4 convenience outlets, 8 retail services outlets, 6 leisure services outlets and 9 financial and business services outlets. This number of multiple outlets is expected given Port Talbot is one of the larger towns within the Council's administrative region and is, therefore, more likely to attract higher profile companies to invest in the town.

Accessibility

9.62 Adequate parking facilities are available in the multistorey car park that links to the Aberafan Shopping Centre, the Tesco surface car park (where parking is free for 2 hours) and the Bethany Square surface car park that stretches in either direction from the Station Road roundabout.

9.63 Upper Station Road is pedestrianised and benefits from an undercover walkway on its western side. There is also an undercover pedestrian bridge linking the main shopping street to the Aberafan Shopping Centre, the multistorey car park, the Council offices and theatre. Lower Station Road has footpaths on either side stretching the full length of the remaining centre area.

9.64 The bus station is located adjacent to the southern edge of the centre boundary, accessed off Grove Place. The main line train station (Port Talbot Parkway) is opposite this and offers regular services to Swansea, Bridgend, Cardiff and beyond.

Pedestrian Activity

9.65 At the time of the site survey there was a good level of pedestrian activity despite the visit taking place on a Wednesday morning. The majority of footfall was recorded along Upper Station Road near to the Tesco, Council offices and Aberafan Shopping Centre.

Environmental Quality

9.66 Given the centre is largely pedestrianised there appeared to be little noise pollution. Noise was more apparent on Lower Station Road, which is trafficked and near to the bus and train stations. Although it is noted this area serves more of the night-time economy.

9.67 Despite the vacancy rate, the negative impact upon the aesthetics of the centre was not significantly detrimental. Litter bins are spread throughout the centre which contributes to the environment for pedestrians. There are also multiple benches and outdoor seating areas associated with café premises.

9.68 In terms of green infrastructure within the centre, there are some individual tree planters within the street and the former Glan Afan Comprehensive School offers a pleasant area of planting as part of its frontage, which contributes to the aesthetics of the area as a whole.

Summary/Conclusions

9.69 Our site survey found Port Talbot Town Centre to be healthy and attractive with a good amount of pedestrian activity. The high number of units condensed within the centre ensures a diverse range of shops and services are present. As a result, the Town Centre is likely to attract visitors from various nearby towns and villages as well as Port Talbot itself.

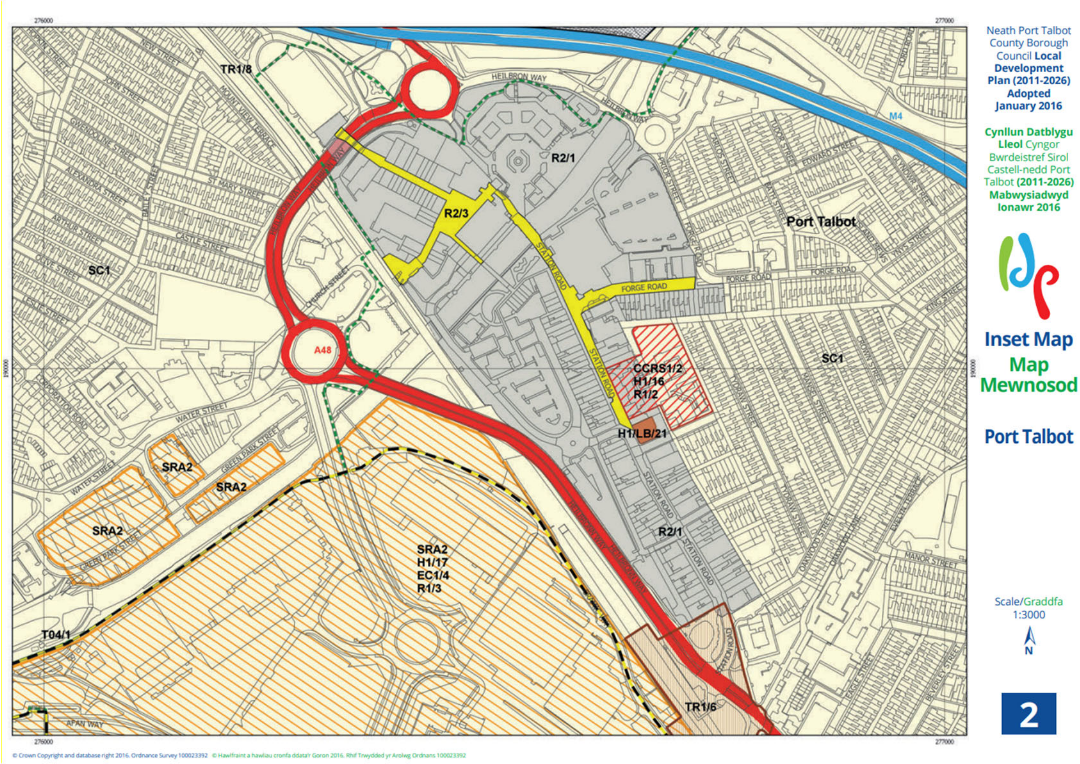
9.70 Good parking facilities, together with presence of the bus and train stations, ensure that Port Talbot is accessible for visitors using their own vehicle and by more sustainable modes of travel.

9.71 Station Road has measures in place to ensure it is pedestrian friendly and there are numerous outdoor seating areas that contribute to the amenity of the area.

9.72 The redevelopment of the former Glan Afan Comprehensive School has improved the appearance of this section of the main shopping street and the introduction of residential dwellings above and to the rear has seemingly resulted in a positive impact by increasing footfall.

9.73 The presence of the council offices and theatre will also contribute to positively to the vitality and viability of the centre, as does the relatively extensive residential walk-in catchment.

Figure 4: *Extract from NPT Local Development Plan – Port Talbot Town Centre*



Impact on Vitality and Viability of Commercial Road/Taibach District Centre (Including Local Consumer Choice and quality of the retail offer)

Centre Overview

9.74 The shops and services in Taibach are defined as a District Centre, according to Policy SP12 (Retail) of the Neath Port Talbot County Borough Council Local Development Plan (LDP) (2011-2026) (January 2016). The sub-text to Policy SP12 states that *"a retail hierarchy has been defined which recognises the specific role and function of the current retail offer within the County Borough. In line with national guidance, all new retail proposals should form part of, or complement, the retail hierarchy which places town centres first and recognises the more local role of district and local centres. The retail hierarchy aims to direct development to town centres, then district centres, local centres and finally out of centre locations."*

9.75 Taibach District Centre is located approximately 1.5km southeast of Port Talbot Town Centre and 2.2km from the proposed development site. The centre generally serves the residents of Taibach and includes a number of retail units and associated facilities and services located largely in a linear format fronting Commercial Road. The centre is supported by two supermarkets (Aldi and Filco), a range of convenience and comparison shops and services including a gym, skin clinic, hairdressers and barbers. There are also some community facilities both within, and within the vicinity of, the proposed District Centre boundary which will increase footfall to the centre and contribute towards its vitality and viability. The retail centre is also supported by various off-street car parks and on-street parking bays.

9.76 Based on the fieldwork undertaken by Avison Young in June 2023, Taibach District Centre was found to contain some 48 units in total. 7 of the units recorded are convenience businesses. The Council's adopted LDP identifies Taibach as one of four District Centres in the County Borough, alongside Glynneath, Skewen and Briton Ferry.

Diversity of Uses

Convenience Goods

9.77 As Table 4 shows, the centre's convenience sector accounts for 14.5% of all units, with 7 convenience stores recorded during the survey. This is above the national average of 9.2%. Two of the convenience stores comprise large units; one is occupied by national retail business (Aldi) and the other by Filco (owned by an independent family business which has 9 stores in South Wales). The Taibach store, which opened in 1998, has a sales area of 645m2, a dedicated customer car park and trades from 8.00-20.00 Monday to Saturday and 10.00- 16.00 on Sundays.

9.78 The Aldi store has a net sales area of 995m^2, of which 796m^2 is accounted for by convenience goods. The store has a dedicated surface-level customer car park and trades from 8.00-22.00 Monday-Saturday and 10.00-16.00 on Sundays. Therefore, the percentile of convenience units within Taibach is not reflective of the significance of convenience goods within the Town Centre. With the exception of Aldi and Filco, the remaining convenience goods offer fulfils a localised role serving the neighbouring residential area, whilst also benefiting from pass-by motorised trade.

Comparison Goods

9.79 The site survey found that comparison goods units comprise 10.5% of the 48 recorded units. This figure falls significantly below the national average of 26.8%. This is most likely due to the proximity of Port Talbot Town Centre and its wider comparison offer.

Table 4: *Diversity of Uses in Taibach District Centre (surveyed in June 2023)*

Use Type	Number of Units (June 2023)	
	No.	Taibach District Centre
Convenience	5	10.5%
Comparison	6	12.5%
Service	26	54%
Miscellaneous	1	2.1%

Vacant	10	20.9%
Total	**48**	**100%**

Leisure, Retail and Business Service Uses

9.80 26 of the 48 units within the centre were recorded to be either leisure, retail or business service units. Service units therefore comprise 54% of all units within the centre. This is well above the national average of 34.1%, which reflects this centre serving the immediate populace and extent of the takeaway market.

Vacant Units

9.81 10 vacant units were recorded, which accounts for 20.9% of commercial units within the centre. This is marginally higher than the national average of 17.6%. Whilst there were gaps in the street scene, this level of vacancy did not appear to have a profound impact upon the visual health of the centre, the buoyancy of which is supported by Aldi and Filco supermarkets.

Miscellaneous Uses

9.82 Alongside retail outlets, the site survey recorded 1 miscellaneous unit. This comprised a residential property.

Balance Between Independent and Multiple Stores

9.83 The Avison Young fieldwork found there to be a total of 35 independent outlets within the District Centre, comprising 6 comparison outlets, 4 convenience outlets, 10 retail services units, 16 leisure services units and 1 financial/business unit. This amounts to 77.1% of total outlets within the centre.

9.84 The Filco supermarket is owned by an independent family business. Our own observations indicate that this store is far less popular than the nearby Aldi store, but has a somewhat different good service offer.

Accessibility

9.85 Adequate parking facilities are located either side of Commercial Road (A48) which largely serve the smaller units that front the street. This comprises layby parking or on-street parking and enables visitors not living within walking distance of the centre to access the shops and services by car. The larger commercial units are served by dedicated car parks; this includes Aldi and Filco.

9.86 Footpaths are located on either side of Commercial Road stretching the full length of the centre and measuring more than 2m in width. At most junctions with side roads, dropped kerbs and tactile paving is in place. Pedestrian crossings are located on all sides of the box junction of Commercial Road and Dyffryn Road (with a pedestrian refuge island bridging Dyffryn Road). A Toucan crossing also spans Commercial Road, opposite Filco Supermarket. The centre also has a 20mph restriction in place along its length. Overall, pedestrians can move safely between each side of the road.

9.87 Bus stops are located on either side of the carriageway of both Commercial Road and Dyffryn Road. These offer regular services to a wide range of locations including Port Talbot, Margam, Swansea, Bridgend and Goytre.

Pedestrian Activity

9.88 At the time of our visit there was a fair level of pedestrian activity despite the visit taking place on a Wednesday afternoon. The majority of footfall was recorded at the western end of the centre near to Aldi and Filco. It was noted that a large proportion of pedestrians recorded in the centre were elderly, which lead us to perceive the centre as relatively safe.

Environmental Quality

9.89 The centre is located on a principal route (the A48) leading to Port Talbot Town Centre. Whilst the Harbour Way link road is likely to divert a considerable proportionate of traffic destined for the Town Centre and through-traffic to wider destinations, Commercial Road is still used as a principal route for the immediate residents. The mainline railway also runs parallel with Commercial Road and represents a source of noise.

9.90 Despite the vacancy rate, the negative impact upon the aesthetics of the centre was not significantly detrimental. Litter bins are spread throughout the centre which contributes to the environment for pedestrians. One bench is present on the northern side of Commercial Road, although no other street furniture was observed. There is also a lack of green infrastructure within the centre, with no trees or planters present.

Summary/Conclusions

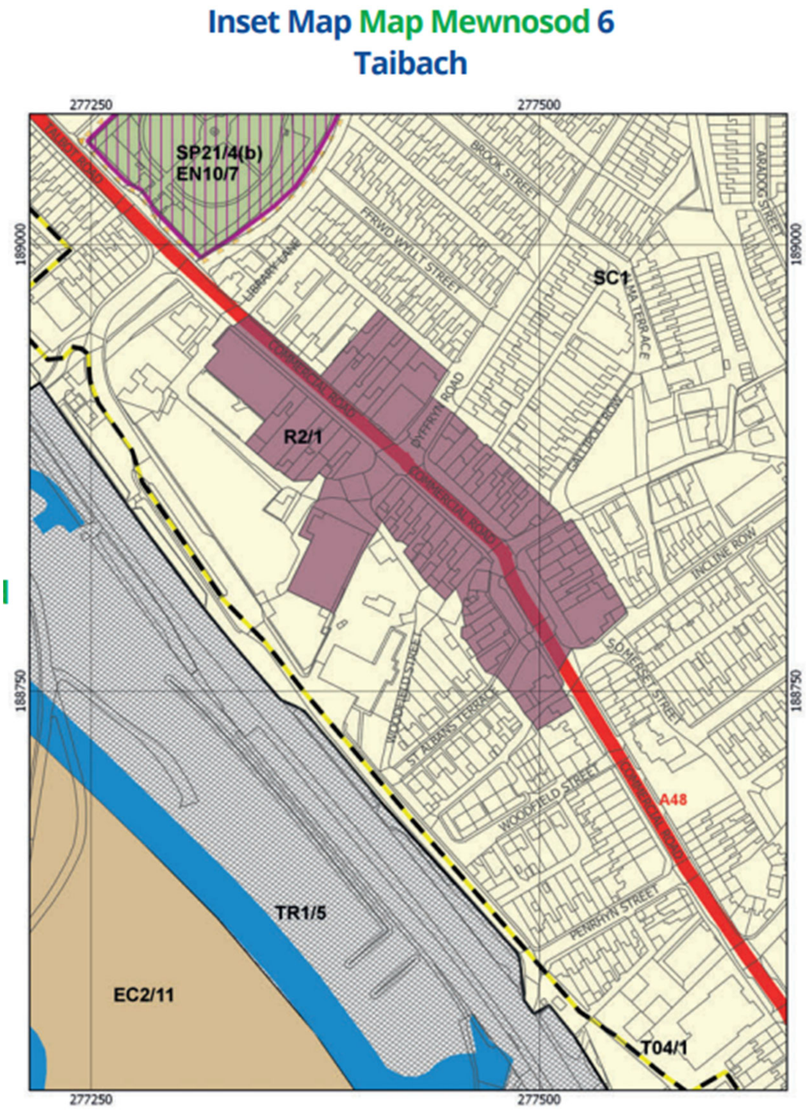
9.91 Our site survey found Taibach District Centre to be a healthy centre. With the exception of the two supermarkets (i.e. Aldi and Filco), which cater for car-borne, main food shopping in relation to a more extensive area, the centre serves a predominantly localised catchment.

9.92 Given the proximity of Port Talbot Town Centre, Taibach District Centre caters for more local needs arising from the residential properties that surround the centre and are interspersed within it.

9.93 Good parking facilities ensure that Taibach is accessible for visitors using their own vehicle and Commercial Road has measures in place to ensure it is pedestrian friendly. The centre is not accessible by train, however there are bus stops located within the centre that connect the shops and services with a range of nearby settlements.

9.94 The health of the centre is supported by Aldi and Filco, which will no doubt generate linked trips with the wider service offer of the centre.

Figure 5: *Extract from NPT Local Development Plan – Commercial Road (Taibach) District Centre*



Impact on Vitality and Viability of Heol Jiwbili, Cwmafan Local Centre (Including Local Consumer Choice and quality of the retail offer)

Centre Overview

9.95 The shops and services at Heol Jiwbili in Cwmafan are defined as a Local Centre, according to Policy SP12 (Retail) of the Neath Port Talbot County Borough Council Local Development Plan (LDP) (2011-2026) (January 2016). The sub-text to Policy SP12 states that *"a retail hierarchy has been defined which recognises the specific role and function of the current retail offer within the County Borough. In line with national guidance, all new retail proposals should form part of, or complement, the retail hierarchy which places town centres first and recognises the more local role of district and local centres. The retail hierarchy aims to direct development to town centres, then district centres, local centres and finally out of centre locations."*

9.96 This Local Centre is located approximately 4.5km northwest of the proposed development site serving the Cwmafan residential area. The centre is divided by Heol Jimbili and comprises a parade of 5 units occupying a single storey block to the north of the road and one large convenience store (occupied by Co-op) on the southern side of the road. There is a dedicated car park on either side of Heol Jiwbili.

9.97 Based on the fieldwork undertaken by Avison Young in June 2023, the Local Centre was found to contain a total of 6 units; all of which were occupied. 2 of the units recorded are convenience businesses. The centre is anchored by a convenience store (Co-op) that has an ATM. A health centre, social club, recreation centre and library are all located within a short walk of the centre.

Diversity of Uses

Table 5: *Diversity of Uses in Heol Jiwibili, Cwmafan Local Centre (surveyed in June 2023)*

Use Type	Number of Units (June 2023)	
	No.	Heol Jiwbili Local Centre
Convenience	2	33.5%
Comparison	0	0%
Service	4	66.5%
Miscellaneous	0	0%
Vacant	0	0%
Total	**6**	**100%**

Convenience Goods

9.98 As Table 5 shows, the centre's convenience sector accounts for 33.5%, which include a Co-op and a Premier convenience store. This figure is well above the national average of 9.2%.

Comparison Goods

9.99 The site survey found there were no comparison goods units. However, given the centre is relatively small, it would be inappropriate for certain comparison goods stores that would generally occupy larger units in larger centres.

Leisure, Retail and Business Service Uses

9.100 4 of the 6 units were recorded to be either leisure, retail or business service units. Service units therefore comprise 66.5% of all units within the centre. These include a fish and chip shop, pharmacy, hair salon and a laundrette.

Vacant Units

9.101 There are no vacant units, which is encouraging given the size of the centre. This reflects the substantial walk-in catchment served by the centre.

Other Miscellaneous Uses

9.102 There are no miscellaneous uses within the centre.

Balance Between Independent and Multiple Stores

9.103 The anchor convenience store is occupied by a national retailer (Co-op), which caters for basket top-up shopping. There is also a Premier store, which is a symbol group in the UK with over 3,000 stores nationwide stocking convenience goods. The remaining businesses are all independents.

Accessibility

9.104 The centre benefits from two large car parks to the rear of the parade of units and to the side of the Co-op. This promotes pass-by trade, particularly for larger shopping trips.

9.105 The parade is served by a wide area of public realm linking to footpaths that connect to the nearby residential streets. There is a stepped access up to the units from the adjacent bus stop on Heol Jiwbili, but the pavement slopes at either end of the parade to provide level access. The Co-op has level access to the footpath and adjacent car park.

9.106 There is a Toucan crossing with a raised table outside the Co-op across Heol Jiwbili. A bus stop is located directly outside the parade of units with a well-kept bus shelter. A bus stop and shelter are also provided on the opposite side of the road. Regular bus services are available to Port Talbot and Brynbryddan.

Pedestrian Activity

9.107 At the time of our survey (Wednesday afternoon), pedestrian activity was high. It is envisaged this centre serves top-up shopping needs and will benefit from pass-by trade.

Environmental Quality

9.108 The residential nature of the immediate surroundings means that noise is somewhat limited to road traffic noise. There are no vacant units in the parade and there are litter bins, street lighting, railings fronting the road and wide footpaths that all contribute to the general environment for pedestrians. There are grass verges in front of and to the side of the units and trees bookend the centre on incidental lawned areas. This, together with the gardens of adjacent residential properties, improves the aesthetic of the parade.

Summary/Conclusions

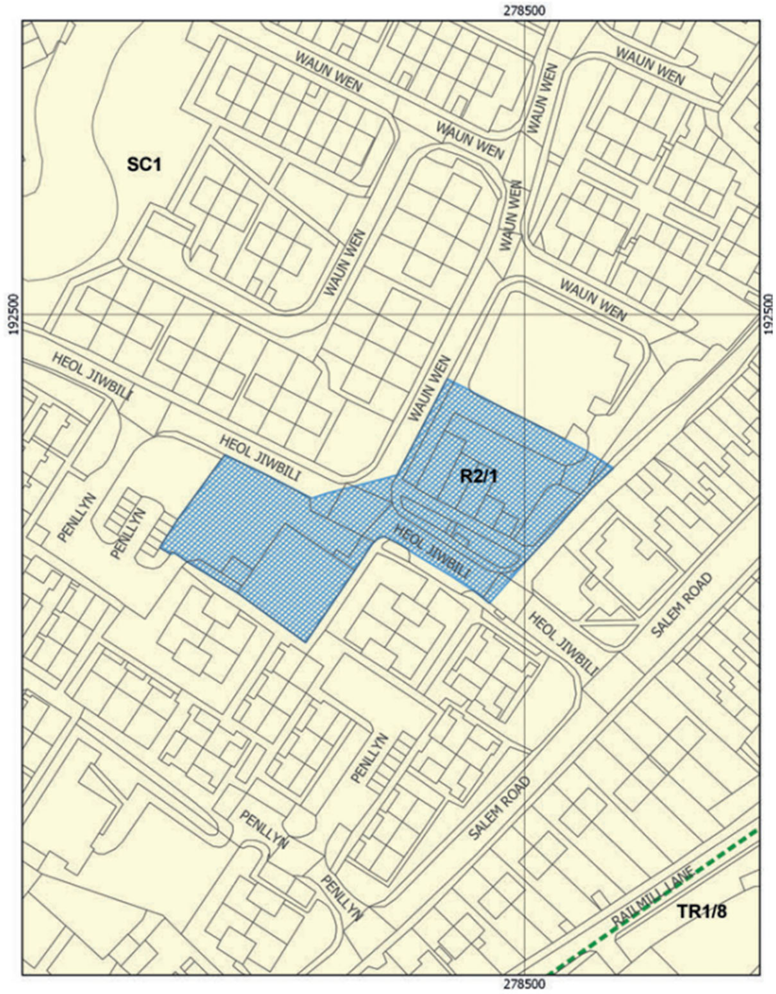
9.109 Our site survey found Heol Jiwbili Local Centre to be a robust and healthy centre. The centre comprises 6 units, all of which are occupied. This is an encouraging situation given the size of the centre and is likely to be a reflection of the substantial walk-in catchment from the locality that will likely be supported by the presence of nearby community facilities.

9.110 There is plentiful off-street parking to the rear of the parade of units and side of the Co-op and the centre is accessible by public transport (there are bus stops in front of the shops). The public realm is functional and offers space for manoeuvrability of pedestrians. There is also a dedicated crossing linking the opposite sides of the centre.

9.111 The health of the centre is reflected by there being no vacant units. This demonstrates that the shops and services provide a local top-up shopping role within the community and reduce the need for residents to travel further to district and town centres. In view of this centre's role and distance from the proposed development site, trade diversion will not be susceptible.

Figure 6: *Extract from NPT Local Development Plan – Heol Jiwbili Local Centre*

Inset Map Map Mewnosod 13
Heol Jiwbili, Cwmafan



Impact on Vitality and Viability of Fairway (Sandfields) (Including Local Consumer Choice and quality of the retail offer)

Centre Overview

9.112 The shops and services in Fairway, Sandfields are defined as a Local Centre, according to Policy SP12 (Retail) of the Neath Port Talbot County Borough Council Local Development Plan (LDP) (2011-2026) (January 2016). The sub-text to Policy SP12 states that *"a retail hierarchy has been defined which recognises the specific role and function of the current retail offer within the County Borough. In line with national guidance, all new retail proposals should form part of, or complement, the retail hierarchy which places town centres first and recognises the more local role of district and local centres. The retail hierarchy aims to direct development to town centres, then district centres, local centres and finally out of centre locations."*

9.113 Fairway, Sandfields Local Centre is located approximately 2.5km northwest of the proposed development site, within the heart of the Sandfields residential area. The centre comprises an 'L' shaped parade of two storey terraced units that front onto Fairway and turn the corner onto Wyvern Avenue. Commercial premises occupy the ground floor with residential flats above. Parking and delivery space is provided to the rear of the units.

9.114 The centre includes a range of retail units offering comparison and convenience goods meeting local residents' day-to-day needs and reducing the need to travel to district and town centres. The centre is supported by off-street car parking to the front of the parade of shops. There are no community facilities within the immediate locality.

9.115 Based on the fieldwork undertaken by Avison Young in June 2023, Fairway Local Centre was found to contain some 12 units in total; all of which were occupied. 3 of the units recorded are convenience businesses.

Diversity of Uses

Convenience Goods

9.116 As Table 6 shows, Fairway Local Centre's convenience sector accounts for 25% of all units in the centre, with 3 convenience stores recorded during the site survey. This figure is well above the national average of 9.2%. Two of these units are occupied by national retailers (One Stop and Premier), with the remaining business being an independent bakery.

Comparison Goods

9.117 The site survey found that comparison goods units comprised 25% of the 12 recorded units. This figure falls slightly below the national average of 26.8%. However, given the centre is relatively small, it would be inappropriate for certain comparison goods stores that would generally occupy larger units in out-of-centre locations.

Table 6: *Diversity of Uses in Fairway Local Centre (surveyed in June 2023)*

Use Type	Number of Units (June 2023)	
	No.	Fairway Local Centre
Convenience	3	25%
Comparison	3	25%
Service	9	75%

Miscellaneous	0	0%
Vacant	0	0%
Total	**12**	**100%**

Leisure, Retail and Business Service Uses

9.118 9 of the 12 units were recorded to be either leisure, retail or business service units. Service units therefore comprise 75% of all units within the centre. These include a barbers, vape shop, florist, diner, tattoo parlour, two takeaways and a social club.

Vacant Units

9.119 There are no vacant units, which is encouraging given the size of the centre. This reflects the substantial walk-in catchment served by the centre.

Other Miscellaneous Uses

9.120 There are no miscellaneous uses within the centre.

Balance Between Independent and Multiple Stores

9.121 Two of the convenience units are occupied by national retailers (One Stop and Premier), which cater for basket top-up shopping. The remaining businesses are all independents.

Accessibility

9.122 The centre benefits from off-street parking to the front of the parade of shops on both Fairway and Wyvern Avenue. This promotes pass-by trade, particularly for larger shopping trips.

9.123 The parade is served by a wide area of public realm linking to footpaths that connect to the nearby residential streets. The road crossings benefit from dropped kerbs with tactile paving and there is a Toucan crossing with a raised table adjacent to the Fairway / Wyvern Avenue junction. There is also a set of speed humps at the western end of the centre slowing speeds coming into the shopping area.

9.124 Bus stops are located on either side of the Fairway carriageway. These offer regular services to Port Talbot Town Centre.

Pedestrian Activity

9.125 At the time of our survey (Wednesday early afternoon), pedestrian activity was high. It is envisaged this centre serves top-up shopping needs and will benefit from pass-by trade.

Environmental Quality

9.126 The residential nature of the immediate surrounding area means that noise is somewhat limited to road traffic noise. There are no vacant units, although the corner unit is occupied by a florist, which partially had the shutters closed (aside form the main entrance). This business appears to be a relatively new addition to the centre and we understand is soon to be fitted-out. Following this, it is expected the centre's aesthetic will improve.

9.127 Notwithstanding this, there are litter bins, benches, street lighting and wide footpaths that all contribute to the general environment for pedestrians. Whilst there is only one tree on the shopping parade side of Fairway, there are some incidental greenspaces opposite the shops. This, together with the gardens of adjacent residential properties, improves the aesthetic of the parade.

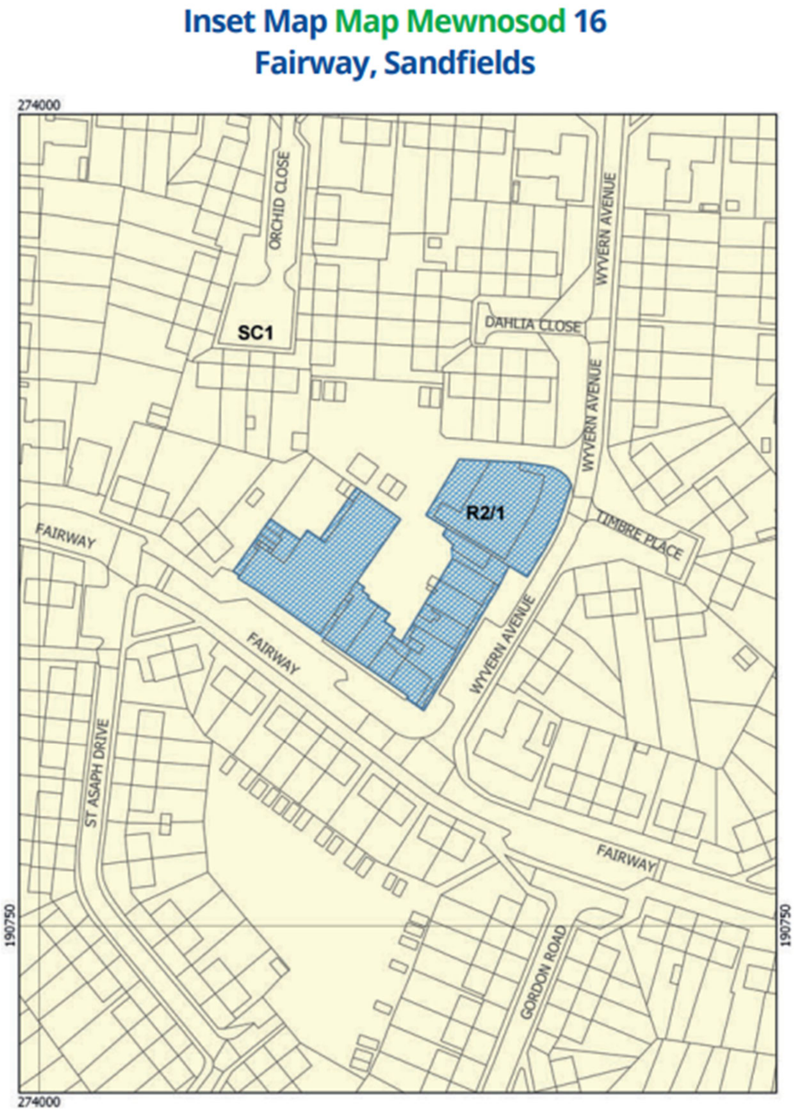
Summary/Conclusions

9.128 Our site survey found Fairway Local Centre to be a robust and healthy centre. The centre comprises 12 units, all of which are occupied. This is an encouraging situation given the size of the centre and is likely to be a reflection of the substantial walk-in catchment from the locality.

9.129 There is plentiful off-street parking to the front of the parade of units, cycle racks are available, and the centre is accessible by public transport (there are bus stops on Fairway). The public realm is functional and offers space for manoeuvrability of pedestrians with some street furniture and a dedicated crossing with raised table leading to the housing directly opposite.

9.130 The health of the centre is reflected by there being no vacant units. This demonstrates that the shops and services within Fairway provide a local top-up shopping role within the community despite Morrisons and Lidl being located in the proximity at Chirstchurch. The co-existence of these demonstrates the limited competition between these materially different businesses.

Figure 7: *Extract from NPT Local Development Plan – Fairway Local Centre*



Impact on Vitality and Viability of Fairwood Drive/Lodge Drive, Baglan Local Centre (Including Local Consumer Choice and quality of the retail offer)

Centre Overview

9.131 The shops and services at Fairwood Drive / Lodge Drive, Baglan are defined as a Local Centre, according to Policy SP12 (Retail) of the Neath Port Talbot County Borough Council Local Development Plan (LDP) (2011-2026) (January 2016). The sub-text to Policy SP12 states that *"a retail hierarchy has been defined which recognises the specific role and function of the current retail offer within the County Borough. In line with national guidance, all new retail proposals should form part of, or complement, the retail hierarchy which places town centres first and recognises the more local role of district and local centres. The retail hierarchy aims to direct development to town centres, then district centres, local centres and finally out of centre locations."*

9.132 This Local Centre is located approximately 4.2km northwest of the proposed development site serving the northern portion of the Baglan residential area. The centre spans Fairwood Drive and Willow Grove from the community centre to the library. It includes three large buildings that house the community centre, library and a day care centre. Dividing these is a small parade of shops that turn the corner of Lodge Drive. There are three large car parks with additional layby parking bays.

9.133 Based on the fieldwork undertaken by Avison Young in June 2023, the centre was found to contain a total of 11 units; 3 of these were vacant and 1 unit is a convenience store (operated by Best-one). The centre's service offer includes a library, community church, day care centre specialising in domiciliary care for people with autism and a dentist surgery.

Diversity of Uses

Table 7: *Diversity of Uses in Fairwood Drive / Lodge Drive, Baglan Local Centre (surveyed in June 2023)*

Use Type	Number of Units (June 2023)	
	No.	Pentwyn Road Local Centre
Convenience	1	9.1%
Comparison	0	0%
Service	5	45.5%
Miscellaneous	2	18.1%
Vacant	3	27.3%
Total	11	100%

Convenience Goods

9.134 As Table 7 shows, the centre's convenience sector accounts for 9.1%. This figure matches the national average of 9.2% and accounts for the one convenience goods store that is operated by Best-one; a retail franchise with over 600 shops throughout the UK.

Comparison Goods

9.135 The site survey found there were no comparison goods units. However, given the centre is relatively small, it would be inappropriate for certain comparison goods stores that would generally occupy larger units in larger centres.

Leisure, Retail and Business Service Uses

9.136 5 of the 11 units were recorded to be either leisure, retail or business service units. Service units therefore comprise 45.5% of all units within the centre. These include a café, day care centre specialising in domiciliary care, dentist surgery, pharmacy and hair salon.

Vacant Units

9.137 There are 3 vacant units, all of which are located within the central parade of shops that turn the corner onto Lodge Road. Given the staggered nature of the units fronting Willow Grove and that these are set down from the street it likely to mean immediate pass-by trade is limited.

Other Miscellaneous Uses

9.138 There are 2 miscellaneous uses within the centre. These include a residential dwelling adjacent to the car park serving the community centre and backing onto Ysgol Gynradd Baglan and the Baglan community church.

Balance Between Independent and Multiple Stores

9.139 The one convenience store is occupied by national retail franchise (Best-one), which caters for basket top-up shopping. The remaining businesses are all independents.

Accessibility

9.140 The centre benefits from a three large car parks and includes lay-by parking. This promotes pass-by trade, particularly for larger shopping trips.

9.141 Despite the centre being divided by two roads, there are good footpath connections between the units and there are speed humps along Lodge Drive that reduce vehicle speeds making it easier to cross the road to the adjacent park. There is a bus stop on Laurel Avenue offering services to Port Talbot and Sandfields.

Pedestrian Activity

9.142 At the time of our survey (Wednesday early afternoon), pedestrian activity was high. This is partially due to parents collecting their children from the local school. Nevertheless, it is envisaged this centre serves top-up shopping needs and will benefit from pass-by trade and linked trips with the school, community church, dentist and day car centre.

Environmental Quality

9.143 The residential nature of the immediate surroundings means that noise is somewhat limited to road traffic noise. There are 3 vacant units in the central parade, although this did not seem to significantly harm the aesthetic of the centre. There are litter bins, street lighting, railings fronting the road and wide footpaths that all contribute to the general environment for pedestrians. In terms of greenery, there are some small planters to the front of the community church. However, the backdrop to the centre is Baglan Park, which improves the general aesthetic.

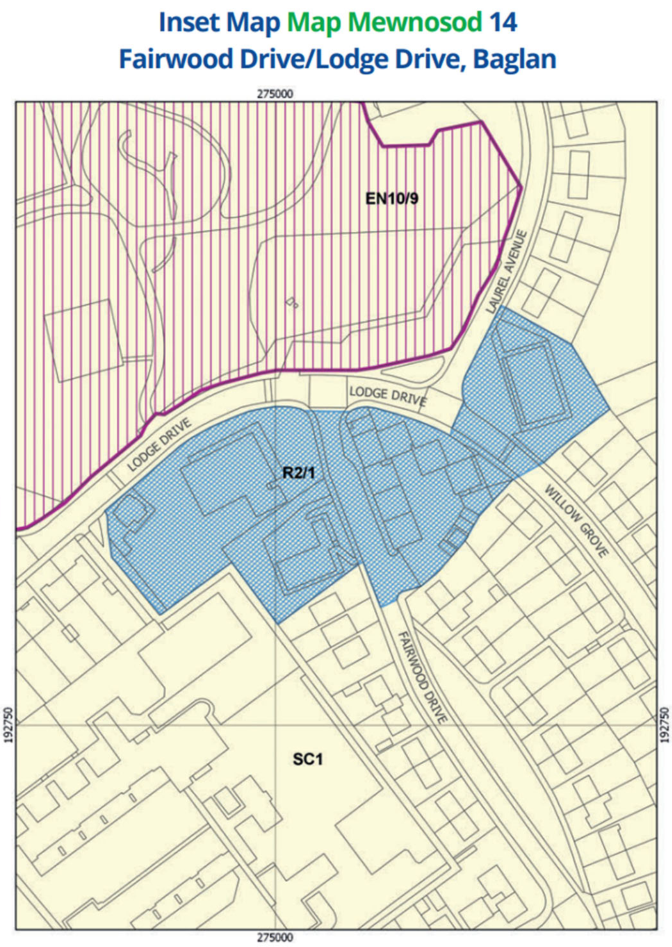
Summary/Conclusions

9.144 Our site survey found Fairwood Drive / Lodge Drive Local Centre to be a robust and healthy centre. The centre comprises 11 units, although 3 units were vacant and one is a residential dwelling. The centre is likely to be supported by the community church, day care centre, school and Baglan park, which will all increase footfall and generate linked trips.

9.145 There is plentiful off-street parking and the centre is accessible by public transport (there is a bus stop on Laurel Avenue). The public realm is functional and offers space for manoeuvrability of pedestrians.

9.146 The one convenience store has limited floor space and serves as a minor top-up shopping location within the community. It will not have any relevance in the context of the proposed development.

Figure 8: *Extract from NPT Local Development Plan – Fairwood Drive / Lodge Drive, Baglan Local Centre*



Impact on Vitality and Viability of Pentwyn Baglan Road Local Centre (Including Local Consumer Choice and quality of the retail offer)

Centre Overview

9.147 The shops and services at Pentwyn Baglan Road is defined as a Local Centre, according to Policy SP12 (Retail) of the Neath Port Talbot County Borough Council Local Development Plan (LDP) (2011-2026) (January 2016). The sub-text to Policy SP12 states that *"a retail hierarchy has been defined which recognises the specific role and function of the current retail offer within the County Borough. In line with national guidance, all new retail proposals should form part of, or complement, the retail hierarchy which places town centres first and recognises the more local role of district and local centres. The retail hierarchy aims to direct development to town centres, then district centres, local centres and finally out of centre locations."*

9.148 Pentwyn Baglan Road Local Centre is located approximately 4km northwest of the proposed development site serving the Baglan residential area. The centre comprises an 'L' shaped parade of part single/part two storey units comprised within a single block that front onto Pentwyn Baglan Road and turn the corner leading to Heol-Y-Nant. Plentiful parking and delivery space is provided to the rear of the units.

9.149 Based on the fieldwork undertaken by Avison Young in June 2023, Pentwyn Baglan Road Local Centre was found to contain some 6 units in total; all of which were occupied. 2 of the units recorded are convenience businesses. The centre is anchored by a convenience store (Spar) that includes a post office and has an ATM. There are no community facilities within the immediate locality.

Diversity of Uses

Table 8: Diversity of Uses in Pentwyn Road, Baglan Local Centre (surveyed in June 2023)

Use Type	Number of Units (June 2023)	
	No.	Pentwyn Road Local Centre
Convenience	2	33.5%
Comparison	0	0%
Service	4	66.5%
Miscellaneous	0	0%
Vacant	0	0%
Total	**6**	**100%**

Convenience Goods

9.150 As Table 8 shows, the centre's convenience sector accounts for 33.5%, which include a Spar and independently owned bakery. This figure is well above the national average of 9.2%.

Comparison Goods

9.151 The site survey found there were no comparison goods units. However, given the centre is relatively small, it would be inappropriate for certain comparison goods stores that would generally occupy larger units in larger centres.

Leisure, Retail and Business Service Uses

9.152 4 of the 6 units were recorded to be either leisure, retail or business service units. Service units therefore comprise 66.5% of all units within the centre. These include two takeaways, a nursery and a hair salon.

Vacant Units

9.153 There are no vacant units, which is encouraging given the size of the centre. This reflects the substantial walk-in catchment served by the centre.

Other Miscellaneous Uses

9.154 There are no miscellaneous uses within the centre.

Balance Between Independent and Multiple Stores

9.155 The anchor convenience store is occupied by national retailers (Spar), which caters for basket top-up shopping. The remaining businesses are all independents.

Accessibility

9.156 The centre benefits from a large car park to the rear of the units. This promotes pass-by trade, particularly for larger shopping trips.

9.157 The parade is served by a wide area of public realm linking to footpaths that connect to the nearby residential streets. There is a stepped access down to the units to the east, whilst the western end has level access given the topography.

9.158 There is a Toucan crossing with a raised table to the east of the parade. A bus stop is located directly outside the units with a well-kept bus shelter. Regular bus services are available to Port Talbot and Swansea.

Pedestrian Activity

9.159 At the time of our survey (Wednesday early afternoon), pedestrian activity was high. It is envisaged this centre serves top-up shopping needs and will benefit from pass-by trade.

Environmental Quality

9.160 The residential nature of the immediate surroundings means that noise is somewhat limited to road traffic noise. There are no vacant units in the parade, although the Spar only partially turns the corner toward Heol-Y-Nant and the continuation of this unit is a solid brick facade. Notwithstanding this, there are litter bins, street lighting, railings fronting the road and wide footpaths that all contribute to the general environment for pedestrians. Trees flank the parade of shops and there is an incidental lawned area to the east. This, together with the gardens of adjacent residential properties, improves the aesthetic of the parade.

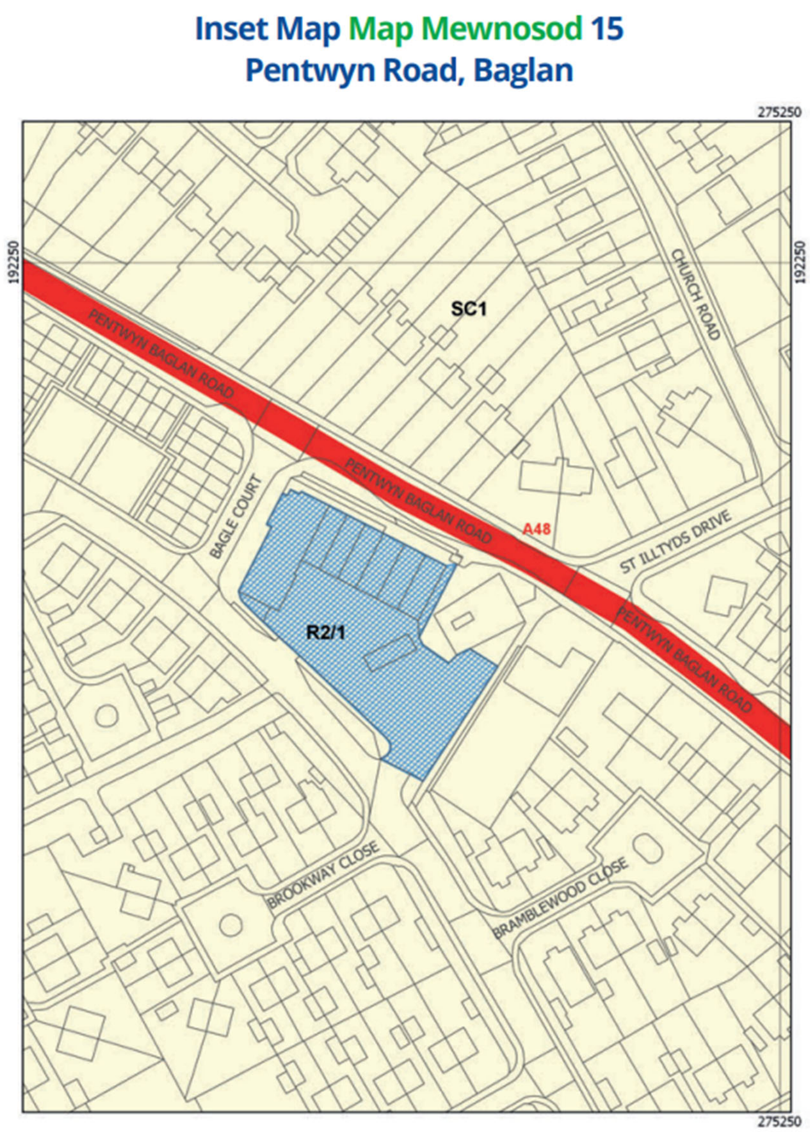
Summary/Conclusions

9.161 Our site survey found Pentwyn Baglan Road Local Centre to be a robust and healthy centre. The centre comprises 6 units, all of which are occupied. This is an encouraging situation given the size of the centre and is likely to be a reflection of the substantial walk-in catchment from the locality.

9.162 There is plentiful off-street parking to the rear of the parade of units and the centre is accessible by public transport (there is a bus stop in front of the shops). The public realm is functional and offers space for manoeuvrability of pedestrians. There is also a dedicated crossing with raised table leading to the housing directly opposite.

9.163 The health of the centre is reflected by there being no vacant units. This demonstrates that the shops and services provide a local top-up shopping role within the community and reduce the need for residents to travel further to district and town centres.

Figure 9: *Extract from NPT Local Development Plan – Pentwyn Road, Baglan Local Centre*



Impact on Travel Patterns over the Catchment Area

9.164 The introduction of an additional 'main' food shopping alternative locally will have a positive effect on the number of residents within Port Talbot that travel to destinations outside of the catchment area to access a choice and range of food shopping destinations (i.e. it will reduce this number). This change will result in more sustainable shopping patterns and will promote social inclusion objectives.

Conclusions – Retail Impact

9.165 Drawing all of the impact analyses set out within this section of the report together, it is clear that the proposed discount foodstore and coffee shop with drive thru will not give rise to any significant adverse impacts upon the vitality and viability of any surrounding centre. Whilst the proposed scheme will inevitably divert some retail trade from foodstores within Port Talbot, and other centres, these stores are all trading particularly strongly and the impact of the application scheme is not at a level that will materially affect the viability of any individual stores in surrounding centres, or the vitality or viability of any centre as a whole.

9.166 Port Talbot town centre currently serves an important role within the local retail hierarchy in meeting the needs of their surrounding local resident population, with the other centres primarily catering for the day-to day needs of residents within a small, localised catchment. These roles will continue irrespective of the application proposals. No conflict is therefore anticipated with Paragraphs 4.3.26 and 4.3.27 of PPW and TAN4.

10. Conclusion

10.1 This Planning and Retail Statement is submitted in support of an application for a new foodstore for Aldi Stores Limited and a Starbucks coffee shop with drive thru on a previously developed site within an established urban area, in a prominent and sustainable location.

10.2 The site falls within the settlement boundary, as defined by the proposals map accompanying the Neath Port Talbot Local Development Plan (LDP) 2011-2026 (adopted January 2016) and is not allocated for any specific land use.

10.3 The site benefits from a historic planning permission (LPA Reference P/2004/1778) for a retail development which was granted in December 2005. We understand that this approved retail development was commenced before the developer pulled out mid-build leaving some part-built steel framed structures on the site. The land has remained vacant and boarded up for well over a decade.

10.4 The proposals provide the opportunity to deliver a modern discount foodstore for Aldi and a Starbucks coffee shop with drive thru on a longstanding vacant, unused and unsightly piece of land bringing with it significant economic benefits, including significant job creation, and ultimately contribute to the area's regeneration.

10.5 The provision of a discount foodstore will also provide a valuable service to the local community. Added to that, the site benefits from a good means of access for the public and deliveries alike which makes it a good location for a retail foodstore and it is accessible by a choice of means of transport. The site's prominent out-of-centre roadside location also makes it an ideal location for a Starbucks coffee shop with a drive thru.

10.6 The proposed development site will realise a number of benefits, including the following:

- The redevelopment will represent an improvement to the visual amenity of the area as a whole.
- The development will address a quantitative and qualitative need in a part of Port Talbot that suffers from high levels of deprivation, offering a local discount foodstore that can provide more affordable shopping to the local community.
- The proposals represent a multi-million pound investment in the area, deliverable in the short-term and which would regenerate a prominent, and long standing, vacant brownfield site.
- There will be an improved level of car parking and access arrangements to the site with potential to enhance the sustainability of shopping trips to reach a discount foodstore.

- The location is close to Port Talbot Town Centre and can help to generate linked trips with this destination to assist its vitality and viability.
- The landscape proposals will enable significant biodiversity enhancements.
- A number of sustainable enhancement measures are proposed to be included in the Travel Plan, including the provision of cycle parking, electric vehicle charging points, provision of a Travel Plan Co-ordinator etc.
- Once complete, the new foodstore and coffee shop with drive thru will generate increased employment opportunities in Port Talbot, offering a requirement for full and part-time staff who will be sourced from the local area (jobs will also be created during construction).

10.7 We have carried out an assessment of potential impacts arising from the provision of a new foodstore and the associated increase in convenience goods floorspace. We have not done the same for the increase in comparison goods floorspace given its very small scale and turnover, and that Aldi's non-food offer varies from week to week so that any impacts are transient. We have concluded that there will be no significant adverse impacts on any centre.

10.8 We have considered whether there are any more centrally located sites or premises that may be suitable and available to accommodate the development that is proposed, taking into account Aldi's business model, which legitimately limits the extent to which Aldi may be 'flexible' in the application of the sequential approach.

10.9 The proposals will not result in any detrimental harm to the visual amenity of the area or the amenity of nearby residents and neither would they harm matters of highway safety, ecology, noise, archaeology, or air quality. The proposed landscaping scheme, including native planting, as well as the proposed ecological enhancements proposed will contribute positively to the biodiversity of the area. Indeed, the development of this long standing vacant previously developed site is considered to be a positive addition to the visual appearance of the area and represents a significant investment in the locality.

10.10 Overall, we conclude that the relevant retail policy tests in the development plan and national policy are met fully by the proposal. Need is demonstrable, no harmful impact will arise, and there are no more centrally located opportunities to accommodate the development that is proposed. The proposed development comprises sustainable development which meets all relevant policy tests set out in the development plan, PPW and its accompanying Technical Advice Notes. It is therefore concluded that the application should be granted planning permission.

Appendix I
Retail Assessment Plan showing Household Survey Study Zone and Primary Catchment

Proposed Aldi Foodstore - Land at Afan Way, Aberavon, Port Talbot

Appendix 1 - Retail Assessment Plan showing Household Survey Study Zone and Primary Catchment

AVISON YOUNG

Key

Proposed Aldi Foodstore
Land at Afan Way, Aberavon, Port Talbot

Primary Catchment

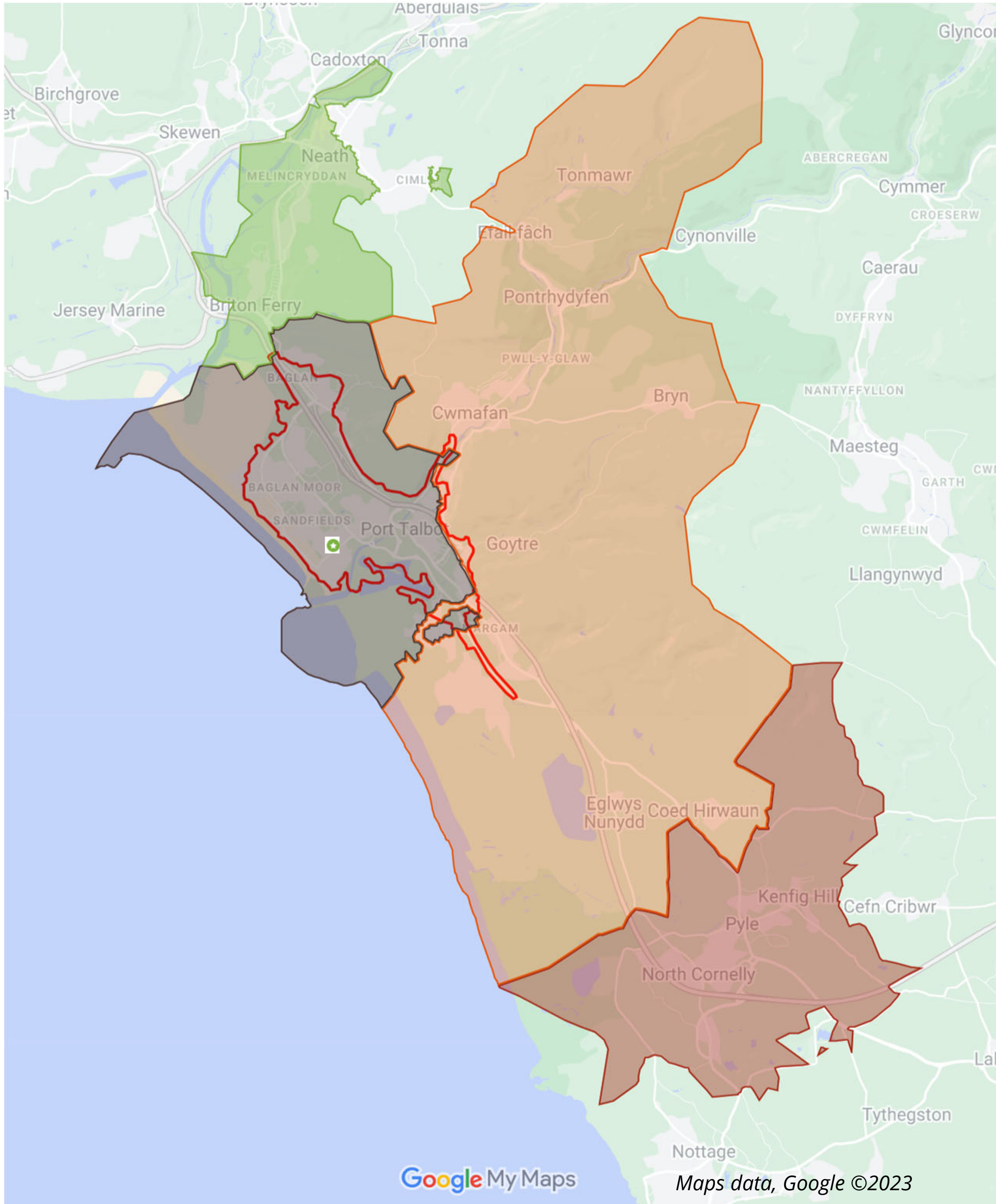
Household Survey Zones

Zone 1: SA12 6, SA12 7, SA12 8 and SA13 1

Zone 2: SA11 1 and SA11 2

Zone 3: SA12 9 and SA13 2

Zone 4: CF33 4 and CF33 6



Maps data, Google ©2023

Appendix II

Retail Assessment Plan showing Primary Catchment Area in the context of allocated centres and existing convenience provision

Proposed Aldi Foodstore - Land at Afan Way, Aberavon, Port Talbot

Appendix 2 - Retail Assessment Plan showing Primary Catchment Area in the context of allocated centres and existing convenience provision

AVISON YOUNG

Key

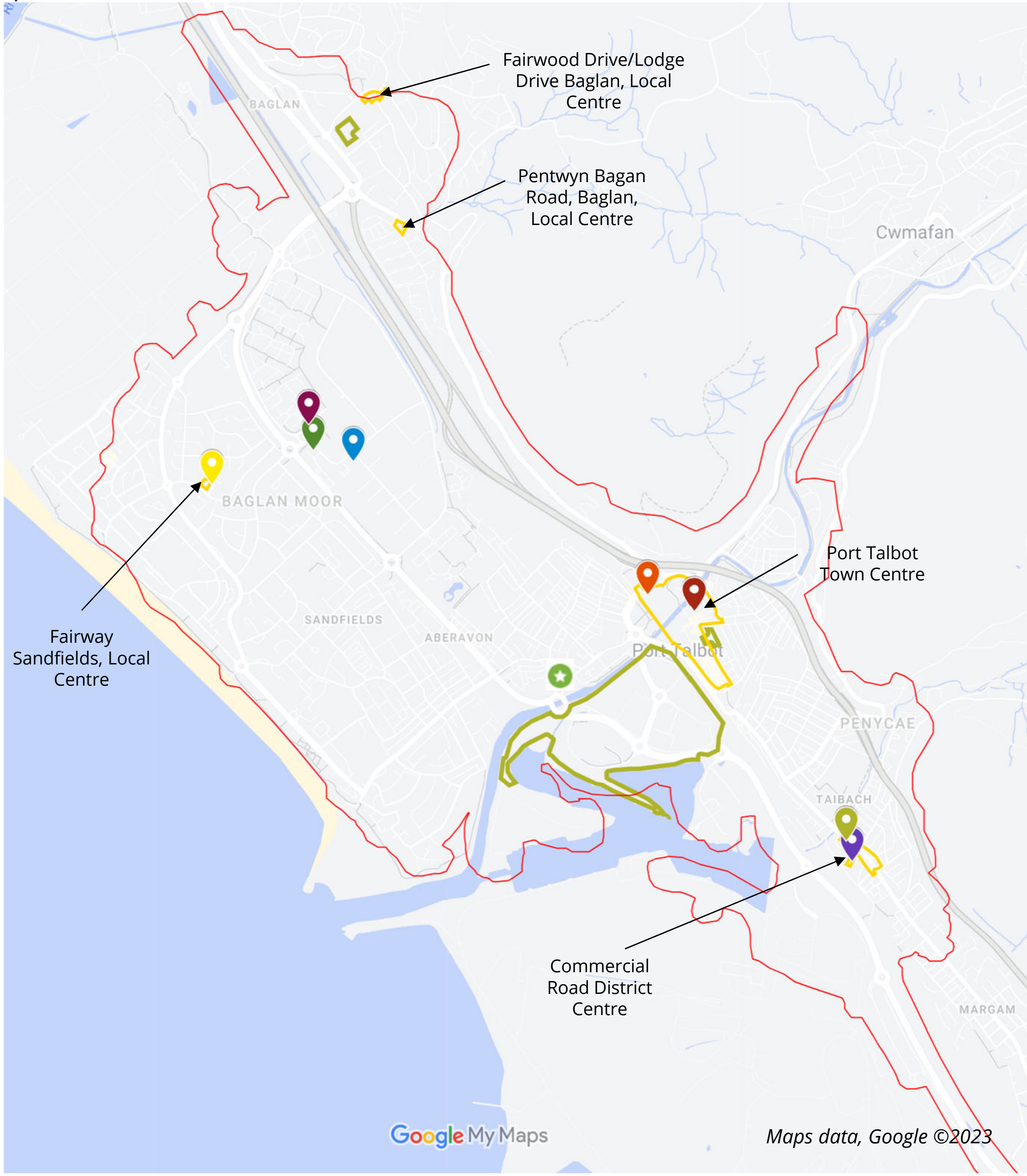
Proposed Aldi Foodstore
Land at Afan Way, Aberavon, Port Talbot

Primary Catchment

Town, District or Local Centre boundary

Retailers

- Aldi
- Costcutter
- Filco
- Iceland
- Lidl
- Morrisons
- Tesco
- Iceland: The Food Warehouse



Appendix III

Sequential sites map

Proposed Aldi Foodstore - Land at Afan Way, Aberavon, Port Talbot

Appendix 3 - Sequential sites map

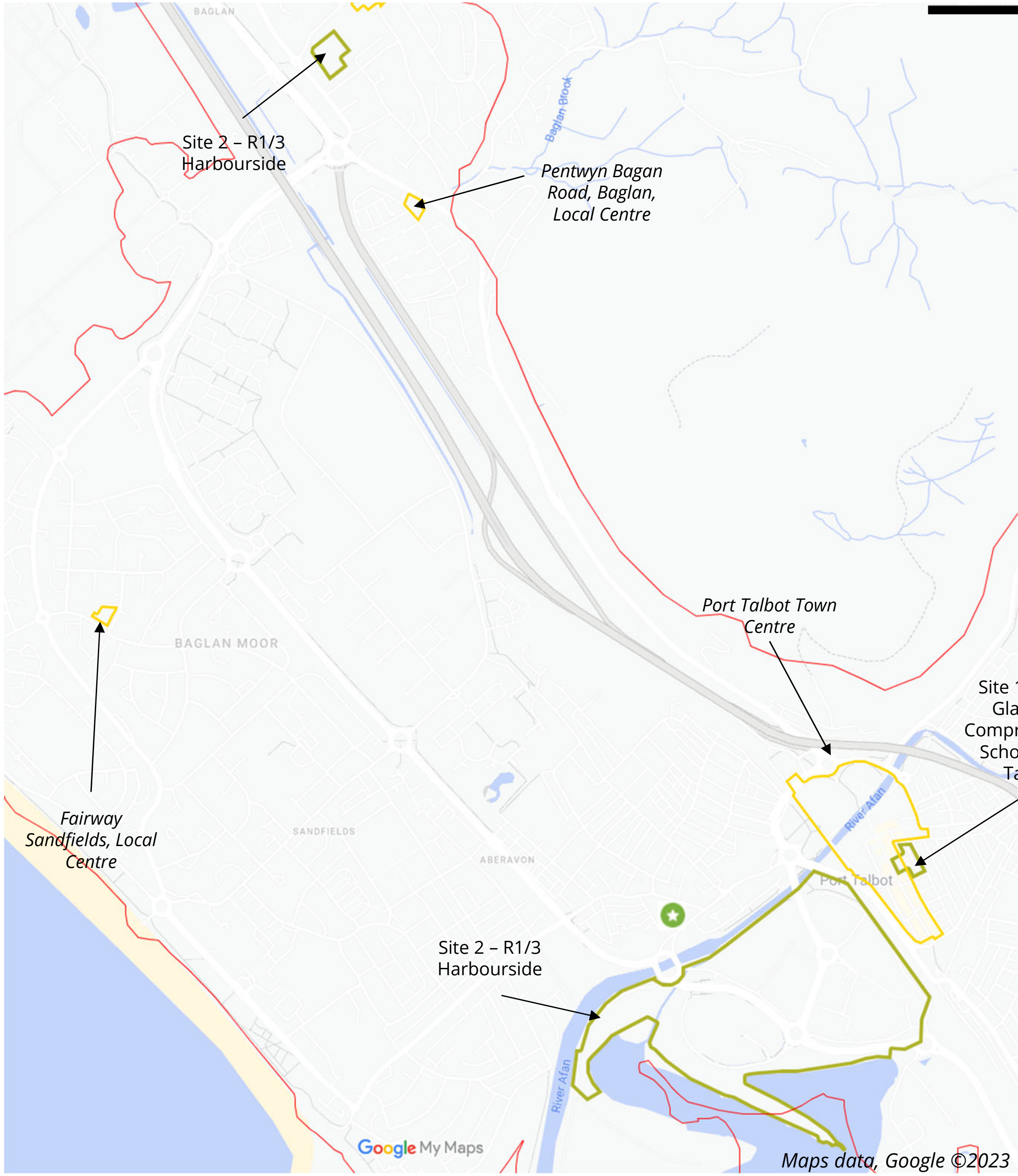
AVISON YOUNG

Key

Proposed Aldi Foodstore
Land at Afan Way, Aberavon, Port Talbot

Primary Catchment

Town, District or Local Centre boundary



Appendix IV

Household Survey

Q01 Where did you last undertake your main food and grocery shopping?

Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi, Commercial Road, Port Talbot, SA13 1LG	10.0%	47	15.6%	30	2.2%	2	10.7%	10	5.5%	5
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	0.7%	3	0.0%	0	0.0%	0	0.0%	0	4.0%	3
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.5%	3	0.7%	1	0.0%	0	1.4%	1	0.0%	0
Aldi, Neath Abbey Rd, Neath SA10 7BR	2.7%	13	0.0%	0	8.7%	9	4.0%	4	0.0%	0
Asda, Coychurch Rd, Bridgend CF31 3AG	0.6%	3	0.0%	0	0.0%	0	0.0%	0	3.5%	3
Asda, Ffald Road Shopping Centre, Pyle, Bridgend, CF33 6BH	8.5%	40	0.8%	2	0.0%	0	1.6%	1	44.9%	37
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.3%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Co-Op Food, Cwmavon, Heol Jiwbill, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	0.3%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Farmfoods, Pentre Felin Retail Park, Tondu, Bridgend, CF32 9GP	0.5%	2	0.0%	0	0.0%	0	0.0%	0	2.8%	2
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	1.9%	9	3.4%	7	0.5%	1	0.0%	0	2.3%	2
Lidl, Briton Ferry Road, Neath, SA11 1AS	2.9%	14	1.3%	2	9.5%	10	1.6%	1	0.0%	0
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	1.0%	5	1.6%	3	0.5%	1	1.3%	1	0.0%	0
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	5.6%	26	9.9%	19	2.7%	3	3.2%	3	1.5%	1
Lidl, Maesteg Rd, Tondu, Off CF32 9DF	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Morrisons, Angel Street, Neath, SA11 1RS	5.1%	24	1.5%	3	20.9%	21	0.0%	0	0.0%	0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	16.1%	76	25.0%	49	6.0%	6	21.9%	20	1.0%	1
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	3.8%	18	3.9%	8	5.2%	5	4.1%	4	1.5%	1
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	0.1%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	6.4%	30	0.0%	0	26.6%	27	3.6%	3	0.0%	0
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	18.5%	87	28.2%	55	3.0%	3	30.4%	28	1.5%	1
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	1.5%	7	0.0%	0	0.0%	0	0.0%	0	8.4%	7
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	0.3%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Sainsbury's, Derwen, Bridgend CF32 9ST	2.4%	11	0.0%	0	5.0%	5	1.7%	2	5.4%	4
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	0.9%	4	0.0%	0	0.0%	0	1.7%	2	3.1%	3
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	0.7%	3	0.7%	1	2.1%	2	0.0%	0	0.0%	0
Local shops, Bridgend Town Centre	0.1%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Local shops, Swansea City Centre	0.1%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	0.7%	3	0.0%	0	0.0%	0	3.6%	3	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.3%	2
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	0.8%	4	1.1%	2	1.6%	2	0.0%	0	0.0%	0
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	0.4%	2	0.0%	0	0.0%	0	2.2%	2	0.0%	0
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	0.3%	2	0.8%	2	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Market St, Bridgend CF31 1LL	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Iceland, Brackla St, Bridgend CF31 1DD	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Local shops, Portcawl	0.6%	3	0.0%	0	0.0%	0	0.0%	0	3.5%	3
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.3%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	0.4%	2	1.0%	2	0.0%	0	0.0%	0	0.0%	0
M&S Green Street East Street 16, Neath SA11 1DH	0.3%	1	0.5%	1	0.5%	1	0.0%	0	0.0%	0
Sainsbury's, Quay Parade, Swansea SA1 8JA	2.3%	11	2.3%	4	4.7%	5	0.5%	0	1.5%	1
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.5%	2	0.9%	2	0.0%	0	0.5%	0	0.0%	0
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.3%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Weighted base:		472		195		101		92		83
Sample:		463		189		95		90		89

Q02 Which retailer did you purchase your main food internet / home delivery shopping from?
Those who said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Amazon Pantry	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda	13.7%	4	18.5%	2	0.0%	0	0.0%	0	21.4%	2
Iceland	10.3%	3	26.4%	2	0.0%	0	6.9%	0	0.0%	0
Marks & Spencer	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	8.6%	2	9.6%	1	40.0%	1	6.9%	0	0.0%	0
Ocado	1.6%	0	4.8%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s	32.2%	9	16.9%	2	40.0%	1	24.3%	1	49.2%	5
Tesco	25.7%	7	23.9%	2	0.0%	0	41.3%	2	25.1%	3
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local farm	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local post office	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	7.9%	2	0.0%	0	20.0%	1	20.6%	1	4.3%	0
Weighted base:		28		9		3		6		10
Sample:		37		11		5		10		11

Q03 How did you travel to (STORE MENTIONED AT Q01) to undertake your main food shop?
Not those who said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Car / van (as driver)	62.5%	295	63.8%	125	59.8%	61	71.8%	66	52.2%	43
Car / van (as passenger)	22.1%	104	16.3%	32	23.8%	24	20.7%	19	35.1%	29
Bus, minibus or coach	5.3%	25	3.3%	6	7.4%	8	7.6%	7	5.1%	4
Motorcycle, scooter or moped	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	8.2%	39	12.3%	24	8.4%	9	0.0%	0	7.6%	6
Taxi	1.2%	5	2.5%	5	0.5%	1	0.0%	0	0.0%	0
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter / disability vehicle	0.7%	3	1.7%	3	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / can't remember)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		472		195		101		92		83
Sample:		463		189		95		90		89

Q04 When you undertook the main food shop at (STORE MENTIONED AT Q01), did you link your trip with any other activity?
Not those who said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Yes – NON-FOOD shopping	10.8%	51	11.3%	22	15.9%	16	6.8%	6	8.2%	7
Yes – other FOOD shopping	9.1%	43	10.0%	20	15.9%	16	4.2%	4	4.0%	3
Yes – visiting services such as banks and other financial institutions	1.5%	7	1.7%	3	0.5%	1	1.6%	1	2.1%	2
Yes – leisure activity	2.6%	12	3.4%	7	0.0%	0	3.6%	3	2.6%	2
Yes – visiting café / pub / restaurant	3.6%	17	5.9%	12	1.6%	2	3.4%	3	0.5%	0
Yes – visiting other service such as hairdressers, beautician, laundrette etc	0.8%	4	0.8%	2	2.1%	2	0.0%	0	0.0%	0
Yes – travelling to / from work	2.7%	13	2.5%	5	0.5%	1	7.8%	7	0.0%	0
Yes – travelling to / from school / college / university	0.1%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Yes – getting petrol	4.1%	19	2.8%	5	4.2%	4	5.2%	5	5.7%	5
Yes – visiting family / friends	3.4%	16	3.5%	7	2.5%	3	3.6%	3	4.0%	3
Yes – visiting health service such as doctor, dentist, hospital	2.9%	14	1.9%	4	2.1%	2	2.2%	2	7.1%	6
Yes – other activity	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – library visit	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(No activity)	55.7%	263	55.0%	107	50.0%	51	55.6%	51	64.2%	53
(Don’t know / varies)	2.7%	13	1.0%	2	4.4%	4	5.4%	5	1.8%	2
Weighted base:		472		195		101		92		83
Sample:		463		189		95		90		89

Q05 Where did you do this linked trip?

Those who said 'Non-food shopping', Other food shopping', Visiting services such as banks and other financial institutions', 'Leisure activity', 'Visiting café / pub / restaurant' or 'Visiting other services' at Q04 AND Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Baglan village centre	0.3%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	1.9%	3	0.0%	0	0.0%	0	0.0%	0	17.4%	3
Briton Ferry Town Centre	1.9%	3	0.7%	0	5.9%	2	0.0%	0	0.0%	0
Maesteg Town Centre	0.3%	0	0.0%	0	0.0%	0	2.3%	0	0.0%	0
Neath Town Centre	14.1%	19	5.9%	4	35.7%	13	10.6%	2	0.0%	0
Port Talbot Town Centre	28.4%	38	42.8%	28	0.0%	0	43.6%	8	17.7%	3
Swansea City Centre	3.4%	4	3.8%	2	1.5%	1	8.3%	1	0.0%	0
Taibach local centre	2.3%	3	4.7%	3	0.0%	0	0.0%	0	0.0%	0
Aberafan Shopping Centre, Port Talbot SA13 1PB	2.2%	3	4.5%	3	0.0%	0	0.0%	0	0.0%	0
Baglan Bay Retail Park, Christchurch Rd, Port Talbot SA12 8BZ	6.5%	9	12.7%	8	0.0%	0	0.0%	0	3.0%	0
Llansamlet Shopping Centre, Swansea SA7 9AG	3.1%	4	0.0%	0	6.0%	2	10.6%	2	0.0%	0
Mcarthur Glen, Designer Outlet, Derwen, Bridgend CF32 9SU	5.0%	7	0.0%	0	13.7%	5	9.1%	2	0.0%	0
Morfa Retail Park, A4067 Quay Parade, Swansea SA1 2AL	1.3%	2	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Aldi, Commercial Road, Port Talbot, SA13 1LG	1.4%	2	0.7%	0	0.0%	0	8.3%	1	0.0%	0
Aldi, Neath Abbey Rd, Neath SA10 7BR	3.2%	4	0.0%	0	11.7%	4	0.0%	0	0.0%	0
Asda, Ffald Road Shopping Centre, Pyle, Bridgend, CF33 6BH	1.1%	2	0.0%	0	0.0%	0	0.0%	0	10.5%	2
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	2.9%	4	2.8%	2	4.5%	2	0.0%	0	3.0%	0
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	1.2%	2	0.0%	0	4.5%	2	0.0%	0	0.0%	0
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	1.3%	2	2.1%	1	0.0%	0	2.3%	0	0.0%	0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	5.4%	7	10.2%	7	1.5%	1	0.0%	0	0.0%	0
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	0.3%	0	0.0%	0	0.0%	0	2.3%	0	0.0%	0
B&M, Riverside Drive, Neath	0.4%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Fforestfach Retail Park, Pontardulais Road, Cadle, Fforest Fach, Swansea (Boots, Next Outlet, Home Bargains)	1.3%	2	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Bridgend Retail Park, Cowbridge Road, Waterton, Bridgend, CF31 3XX (Currys, Homebase, Home Bargains, Next, B&M)	0.6%	1	0.0%	0	0.0%	0	0.0%	0	5.9%	1
Culverhouse Cross, Cardiff CF5 5TG	1.5%	2	3.1%	2	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Swansea SA7 9FT	0.4%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Kenfig Hill	0.3%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	0
M&S, Green Street East Street 16, Neath SA11 1DH	3.3%	4	0.0%	0	11.9%	4	0.0%	0	0.0%	0
Matalan, Foundry Rd, Morriston, Swansea SA6 8DU	0.3%	0	0.0%	0	0.0%	0	2.3%	0	0.0%	0
North Cornelly	0.3%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Pentre Felin Retail Park, Tondu CF32 9GP	1.8%	2	0.0%	0	0.0%	0	0.0%	0	16.4%	2
Pyle	0.6%	1	0.0%	0	0.0%	0	0.0%	0	5.9%	1
Village Farm Industrial Estate, Pyle, Bridgend CF33 6BJ	1.6%	2	0.0%	0	0.0%	0	0.0%	0	14.4%	2
Weighted base:		134		65		37		18		14
Sample:		131		64		29		18		20

Q06 Where did you undertake your main food and grocery shopping the time before last? Was it the same place or somewhere different?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi, Commercial Road, Port Talbot, SA13 1LG	9.8%	45	14.2%	26	2.2%	2	10.0%	9	8.9%	8
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Aldi, Neath Abbey Rd, Neath SA10 7BR	1.9%	9	0.0%	0	5.6%	6	3.6%	3	0.0%	0
Asda, Coychurch Rd, Bridgend CF31 3AG	0.7%	3	0.0%	0	0.0%	0	0.0%	0	3.9%	3
Asda, Ffald Road Shopping Centre, Pyle, Bridgend, CF33 6BH	9.1%	42	0.2%	0	0.0%	0	1.6%	1	46.8%	40
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.3%	2	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Co-Op Food, Cwmavon, Heol Jiwbill, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	0.3%	2	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Farmfoods, Pentre Felin Retail Park, Tondu, Bridgend, CF32 9GP	0.5%	2	0.0%	0	0.0%	0	0.0%	0	2.8%	2
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	1.0%	5	2.2%	4	0.6%	1	0.0%	0	0.0%	0
Iceland, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	0.7%	3	0.7%	1	1.7%	2	0.0%	0	0.0%	0
Iceland, lynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.3%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, Old Market Street, Neath, SA11 3NA	0.5%	3	0.0%	0	2.5%	3	0.0%	0	0.0%	0
Lidl, Briton Ferry Road, Neath, SA11 1AS	3.4%	16	1.8%	3	10.9%	11	1.6%	1	0.0%	0
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	1.2%	6	0.9%	2	2.8%	3	1.4%	1	0.0%	0
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	6.4%	30	10.0%	19	1.1%	1	10.0%	9	1.0%	1
Lidl, Maesteg Rd, Tondu, Off CF32 9DF	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Morrisons, Angel Street, Neath, SA11 1RS	5.5%	26	1.6%	3	21.6%	21	1.4%	1	0.0%	0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	16.0%	74	26.0%	49	5.6%	6	19.2%	17	2.9%	3
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	3.0%	14	2.8%	5	3.7%	4	4.2%	4	1.5%	1
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	5.4%	25	0.0%	0	23.3%	23	1.8%	2	0.0%	0
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	18.9%	87	31.1%	58	3.1%	3	28.5%	26	0.5%	0
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	1.9%	9	0.0%	0	0.0%	0	2.3%	2	7.7%	7
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	0.8%	4	0.2%	0	0.0%	0	0.0%	0	3.9%	3
Sainsbury's, Derwen, Bridgend CF32 9ST	2.2%	10	0.8%	2	5.1%	5	0.0%	0	4.2%	4
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	0.5%	2	0.0%	0	0.0%	0	0.0%	0	2.5%	2
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	0.2%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Local shops, Swansea City Centre	0.1%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	0.7%	3	0.7%	1	0.0%	0	2.1%	2	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.3%	2
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	1.1%	5	1.8%	3	1.7%	2	0.0%	0	0.0%	0
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	0.4%	2	0.0%	0	0.0%	0	2.3%	2	0.0%	0
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	0.1%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Home Bargains, Market St, Bridgend CF31 1LL	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Iceland, Brackla St, Bridgend CF31 1DD	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.3%	2
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Local shops, North Cornelly	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Local shops, Portcawl	0.6%	3	0.0%	0	0.0%	0	0.0%	0	3.4%	3
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.3%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	0.4%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0
M&S Green Street East Street 16, Neath SA11 1DH	0.5%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Sainsbury's, Quay Parade, Swansea SA1 8JA	2.4%	11	1.8%	3	4.2%	4	2.6%	2	1.5%	1
Tesco Extra, Culverhouse Cross, Cardiff CF5 6XQ	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.2%	1	0.0%	0	0.6%	1	0.5%	0	0.0%	0
Tesco Superstore, Aberystwyth Rd, New Town, Cardigan SA43 1NA	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.3%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Weighted base:		461		187		99		90		85
Sample:		456		183		94		88		91

Q07 Which retailer did you purchase that main food internet / home delivery shopping from?
Those who said 'Internet / delivery' at Q06

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Amazon Pantry	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda	11.5%	3	17.2%	2	0.0%	0	0.0%	0	21.6%	2
Iceland	16.5%	5	29.0%	3	0.0%	0	26.7%	2	0.0%	0
Marks & Spencer	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	14.9%	4	13.4%	1	61.9%	3	5.5%	0	0.0%	0
Ocado	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s	37.0%	11	31.5%	3	25.4%	1	19.3%	1	67.6%	5
Tesco	16.8%	5	8.9%	1	0.0%	0	48.5%	4	5.4%	0
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local farm	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local post office	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	3.3%	1	0.0%	0	12.7%	1	0.0%	0	5.4%	0
Weighted base:		30		10		4		8		8
Sample:		35		11		5		10		9

Q08 How did you travel to (STORE MENTIONED AT Q06) to undertake your main food shop?
Not those who said 'Internet / delivery' or '(Don't know / can't remember)' at Q06

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Car / van (as driver)	63.3%	292	63.5%	119	56.1%	56	76.3%	68	57.6%	49
Car / van (as passenger)	22.8%	105	17.6%	33	28.2%	28	19.8%	18	31.3%	27
Bus, minibus or coach	5.3%	24	4.0%	8	7.6%	8	3.9%	3	6.7%	6
Motorcycle, scooter or moped	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	6.6%	31	10.6%	20	7.0%	7	0.0%	0	4.4%	4
Taxi	1.8%	9	4.0%	7	1.1%	1	0.0%	0	0.0%	0
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter / disability vehicle	0.1%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / can't remember)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		461		187		99		90		85
Sample:		456		183		94		88		91

Q09 When you undertook the main food shop at (STORE MENTIONED AT Q06), did you link your trip with any other activity?
Not those who said 'Internet / delivery' or '(Don't know / can't remember)' at Q06

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Yes – NON-FOOD shopping	12.3%	57	9.6%	18	16.2%	16	9.9%	9	16.1%	14
Yes – other FOOD shopping	7.7%	36	7.8%	15	10.4%	10	7.8%	7	4.4%	4
Yes – visiting services such as banks and other financial institutions	2.1%	10	2.9%	5	1.7%	2	3.0%	3	0.0%	0
Yes – leisure activity	2.5%	12	3.1%	6	0.0%	0	0.9%	1	5.8%	5
Yes – visiting café / pub / restaurant	3.6%	16	4.1%	8	2.8%	3	5.3%	5	1.5%	1
Yes – visiting other service such as hairdressers, beautician, laundrette etc	0.8%	4	1.2%	2	0.0%	0	0.0%	0	2.0%	2
Yes – travelling to / from work	2.8%	13	1.9%	4	0.6%	1	8.3%	7	1.8%	2
Yes – travelling to / from school / college / university	0.7%	3	1.8%	3	0.0%	0	0.0%	0	0.0%	0
Yes – getting petrol	2.8%	13	2.2%	4	0.6%	1	6.0%	5	3.3%	3
Yes – visiting family / friends	5.0%	23	4.8%	9	3.1%	3	8.8%	8	3.7%	3
Yes – visiting health service such as doctor, dentist, hospital	1.7%	8	1.3%	2	3.3%	3	0.5%	0	1.9%	2
Yes – other activity	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – library visit	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(No activity)	52.7%	243	54.2%	101	55.6%	55	40.2%	36	59.1%	50
(Don’t know / varies)	5.2%	24	5.1%	10	5.8%	6	9.3%	8	0.5%	0
Weighted base:		461		187		99		90		85
Sample:		456		183		94		88		91

Q10 Where did you do this linked trip?

Those who said 'Non-food shopping', Other food shopping', Visiting services such as banks and other financial institutions', 'Leisure activity', 'Visiting café / pub / restaurant' or 'Visiting other services' at Q09 AND Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Bridgend Town Centre	2.5%	3	0.0%	0	0.0%	0	0.0%	0	12.6%	3
Briton Ferry Town Centre	1.5%	2	3.9%	2	0.0%	0	0.0%	0	0.0%	0
Maesteg Town Centre	1.3%	2	2.6%	1	0.0%	0	1.7%	0	0.0%	0
Neath Town Centre	16.2%	21	3.1%	2	55.9%	17	11.4%	3	0.0%	0
Port Talbot Town Centre	30.9%	40	47.4%	24	1.8%	1	58.8%	14	5.9%	2
Swansea City Centre	1.0%	1	2.6%	1	0.0%	0	0.0%	0	0.0%	0
Tonna local centre	1.3%	2	0.0%	0	0.0%	0	0.0%	0	6.5%	2
Aberafan Shopping Centre, Port Talbot SA13 1PB	5.3%	7	13.5%	7	0.0%	0	0.0%	0	0.0%	0
Baglan Bay Retail Park, Christchurch Rd, Port Talbot SA12 8BZ	2.7%	4	6.8%	4	0.0%	0	0.0%	0	0.0%	0
Llansamlet Shopping Centre, Swansea SA7 9AG	3.9%	5	3.1%	2	5.5%	2	7.9%	2	0.0%	0
Mcarthur Glen, Designer Outlet, Derwen, Bridgend CF32 9SU	3.8%	5	0.0%	0	16.6%	5	0.0%	0	0.0%	0
Waterton Retail Park, Unit 6 to 7, Bridgend CF31 3TN	1.3%	2	0.0%	0	0.0%	0	0.0%	0	6.5%	2
Homebase, Unit 1, Bridgend Retail Park, Cowbridge Rd, Bridgend CF31 3XX	1.6%	2	0.0%	0	0.0%	0	0.0%	0	8.2%	2
Aldi, Commercial Road, Port Talbot, SA13 1LG	2.1%	3	1.7%	1	0.0%	0	7.9%	2	0.0%	0
Aldi, Neath Abbey Rd, Neath SA10 7BR	1.3%	2	0.0%	0	5.5%	2	0.0%	0	0.0%	0
Asda, Ffald Road Shopping Centre, Pyle, Bridgend, CF33 6BH	1.2%	2	0.0%	0	0.0%	0	0.0%	0	5.9%	2
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	2.6%	3	2.6%	1	0.0%	0	0.0%	0	8.2%	2
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	1.1%	1	0.9%	0	1.8%	1	1.7%	0	0.0%	0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	2.1%	3	4.2%	2	1.8%	1	0.0%	0	0.0%	0
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	0.3%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	1.3%	2	0.0%	0	5.5%	2	0.0%	0	0.0%	0
B&M, Riverside Drive, Neath	1.4%	2	0.0%	0	1.8%	1	5.2%	1	0.0%	0
Fforestfach Retail Park, Pontardulais Road, Cadle, Fforest Fach, Swansea (Boots, Next Outlet, Home Bargains)	0.3%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
Bridgend Retail Park, Cowbridge Road, Waterton, Bridgend, CF31 3XX (Currys, Homebase, Home Bargains, Next, B&M)	0.7%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	1
Pyle Garden Centre, Heol Mostyn, Village Farm Industrial Estate, Pyle, Bridgend CF33 6BJ	0.3%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
Cardigan	0.4%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Culverhouse Cross, Cardiff CF5 5TG	2.5%	3	3.9%	2	0.0%	0	0.0%	0	5.0%	1
M&S, Green Street East Street 16, Neath SA11 1DH	0.3%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0
Matalan, Foundry Rd,	1.0%	1	2.6%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Morriston, Swansea SA6 8DU										
North Cornelly	0.3%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0
Porthcawl	0.3%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0
Pyle	6.4%	8	0.0%	0	0.0%	0	0.0%	0	32.7%	8
Swansea Enterprise Park, Swansea, SA7 9RF	0.4%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Village Farm Industrial Estate, Pyle, Bridgend CF33 6BJ	0.3%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0
Weighted base:		131		51		30		24		25
Sample:		126		47		28		26		25

Meanscore (£):

Q11 Thinking more generally, how much does your household spend on average on main food and grocery shopping in a week?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
£1 - £5	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
£6 - £10	0.4%	2	0.0%	0	0.5%	1	0.0%	0	1.8%	2
£11 - £15	0.4%	2	0.8%	2	0.0%	0	0.4%	0	0.0%	0
£16 - £20	1.6%	8	0.4%	1	0.5%	1	2.1%	2	4.9%	5
£21 - £25	2.5%	13	2.2%	4	1.6%	2	0.0%	0	7.0%	6
£26 - £30	3.7%	19	5.0%	10	4.2%	4	0.4%	0	3.9%	4
£31 - £35	1.2%	6	0.7%	1	4.0%	4	0.0%	0	0.5%	0
£36 - £40	4.4%	22	6.2%	13	3.7%	4	3.6%	4	1.8%	2
£41 - £45	1.7%	8	1.9%	4	1.1%	1	3.0%	3	0.5%	0
£46 - £50	6.1%	30	3.7%	8	8.3%	9	9.6%	9	5.0%	5
£51 - £60	8.1%	41	7.9%	16	3.2%	3	7.7%	8	14.5%	13
£61 - £70	8.6%	43	8.5%	17	7.5%	8	12.2%	12	6.4%	6
£71 - £80	11.8%	59	10.2%	21	16.5%	17	8.2%	8	14.1%	13
£81 - £90	6.4%	32	5.5%	11	5.6%	6	9.6%	9	5.7%	5
£91 - £100	13.4%	67	11.4%	23	17.5%	18	11.9%	12	14.8%	14
£101 - £110	0.8%	4	1.8%	4	0.5%	1	0.0%	0	0.0%	0
£111 - £120	4.5%	23	5.0%	10	5.4%	6	6.4%	6	0.5%	0
£121 - £130	2.4%	12	2.9%	6	1.1%	1	1.5%	1	3.4%	3
£131 - £140	2.2%	11	2.9%	6	2.1%	2	1.5%	1	1.8%	2
£141 - £150	5.1%	26	6.4%	13	6.1%	6	1.3%	1	5.2%	5
£151 - £175	0.7%	3	0.7%	1	0.0%	0	2.1%	2	0.0%	0
£176 - £200	3.9%	20	5.1%	10	2.6%	3	3.6%	4	3.1%	3
£201 - £225	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£226 - £250	0.4%	2	0.2%	0	0.0%	0	0.0%	0	1.6%	2
£251 - £275	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£276 - £300	0.1%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
£301+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	9.2%	46	10.4%	21	8.0%	8	14.5%	14	2.3%	2
(Refused)	0.3%	1	0.0%	0	0.0%	0	0.4%	0	0.9%	1
Mean:		*85.25*		*89.20*		*83.52*		*84.78*		*79.47*
Weighted base:		500		205		104		98		93
Sample:		500		200		100		100		100

Q12 Do you make ‘top up’ shopping trips in between your main food shopping trips? Top up grocery shopping includes ‘basket shops’ in foodstores, purchases from speciality retailers such as bakers, butchers and greengrocers, and snacks bought from shops. It could also include online food shopping.

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Yes	73.5%	367	72.1%	147	70.1%	73	77.3%	76	76.4%	71
No	26.5%	133	27.9%	57	29.9%	31	22.7%	22	23.6%	22
Weighted base:		500		205		104		98		93
Sample:		500		200		100		100		100

Q13 Where did you last undertake your 'top up' shopping?
Those who do top-up shopping at Q12 AND Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi, Commercial Road, Port Talbot, SA13 1LG	4.6%	16	5.1%	7	0.0%	0	11.2%	8	0.7%	0
Asda, Castle Street, Maesteg, CF34 9UN	0.5%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0
Asda, Coychurch Rd, Bridgend CF31 3AG	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Asda, Ffald Road Shopping Centre, Pyle, Bridgend, CF33 6BH	6.9%	24	0.3%	0	0.0%	0	0.0%	0	37.8%	24
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.6%	2	0.0%	0	0.0%	0	2.7%	2	0.0%	0
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.1%	0	0.3%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op Food, Cwmavon, Heol Jiwbill, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	2.1%	7	0.0%	0	0.0%	0	9.5%	7	0.0%	0
Co-Op Food, Penllyn, Cwmavon, Port Talbot, SA12 9NW	3.3%	11	1.1%	2	0.0%	0	12.8%	10	0.0%	0
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	1.4%	5	0.0%	0	0.0%	0	6.6%	5	0.0%	0
Costcutter, Fairway, Port Talbot, SA12 7HR	0.5%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	0.6%	2	0.0%	0	0.0%	0	0.0%	0	3.1%	2
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	1.5%	5	2.6%	4	0.0%	0	1.9%	1	0.0%	0
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	4.6%	16	5.6%	8	2.8%	2	8.3%	6	0.0%	0
Iceland, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	0.9%	3	2.3%	3	0.0%	0	0.0%	0	0.0%	0
Iceland, Old Market Street, Neath, SA11 3NA	1.5%	5	0.0%	0	7.3%	5	0.0%	0	0.0%	0
Lidl, Briton Ferry Road, Neath, SA11 1AS	2.9%	10	1.0%	1	12.4%	9	0.0%	0	0.0%	0
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	3.6%	12	6.1%	8	3.5%	3	1.9%	1	0.0%	0
Morrisons, Angel Street, Neath, SA11 1RS	2.6%	9	1.1%	2	9.3%	7	1.1%	1	0.0%	0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	7.5%	26	13.1%	18	4.7%	3	4.1%	3	2.6%	2
Tesco Express, Cimla Road, Neath, SA11 3UG	1.5%	5	0.0%	0	5.3%	4	1.6%	1	0.0%	0
Tesco Express, Langdon Road, Swansea, SA1 8QY	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	2.4%	8	1.1%	2	9.4%	7	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	0.9%	3	1.0%	1	0.0%	0	0.0%	0	2.6%	2
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	1.0%	4	0.0%	0	1.6%	1	3.3%	2	0.0%	0
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	13.4%	47	21.7%	30	0.8%	1	21.3%	16	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	0.4%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Tesco Express, Neath Road, Briton Ferry, Port Talbot,	2.1%	7	1.6%	2	7.0%	5	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Neath SA11 2AX										
Local shops, Baglan village centre	2.1%	7	5.3%	7	0.0%	0	0.0%	0	0.0%	0
Local shops, Bridgend Town Centre	0.4%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Local shops, Briton Ferry Town Centre	1.3%	4	0.0%	0	6.1%	4	0.0%	0	0.0%	0
Local shops, Cwmafan village centre	0.4%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Local shops, Maesteg Town Centre	0.5%	2	0.0%	0	0.0%	0	2.5%	2	0.0%	0
Local shops, Neath Town Centre	1.0%	3	0.0%	0	4.7%	3	0.0%	0	0.0%	0
Local shops, Pontardawe local centre	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Local shops, Port Talbot Town Centre	5.6%	20	11.5%	16	0.8%	1	4.1%	3	0.0%	0
Local shops, Swansea City Centre	1.2%	4	1.3%	2	3.5%	3	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.6%	2	0.0%	0	0.0%	0	0.0%	0	3.1%	2
CKs Supermarket, Cimla Rd, Neath SA11 3UG	1.9%	7	0.0%	0	9.1%	7	0.0%	0	0.0%	0
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	0.9%	3	1.1%	2	0.0%	0	2.1%	2	0.0%	0
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	1.1%	4	0.0%	0	0.0%	0	0.0%	0	6.1%	4
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Kenfig Hill	2.3%	8	0.0%	0	0.0%	0	0.0%	0	12.7%	8
Local shops, North Cornelly	1.8%	6	0.0%	0	0.0%	0	0.0%	0	9.8%	6
Local shops, Portcawl	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Local shops, Pyle	1.2%	4	0.0%	0	0.0%	0	0.0%	0	6.4%	4
M&S Green Street East Street 16, Neath SA11 1DH	2.7%	9	1.5%	2	10.2%	7	0.0%	0	0.0%	0
Premier, Forge Rd, Port Talbot SA13 1PG	0.5%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Quay Parade, Swansea SA1 8JA	0.6%	2	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	2.5%	9	5.8%	8	0.8%	1	0.0%	0	0.0%	0
Spar, Talbot Rd, Neath SA13 1DT	0.6%	2	1.3%	2	0.0%	0	0.6%	0	0.0%	0
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	2.1%	7	0.0%	0	0.0%	0	0.0%	0	11.6%	7
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.5%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0
Weighted base:		347		138		71		75		62
Sample:		322		126		69		68		59

Q14 Which retailer did you purchase your top-up food internet / home delivery shopping from?
Those who said 'Internet / delivery' at Q13

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Amazon Pantry	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland	37.9%	2	100.0%	2	100.1%	1	0.0%	0	0.0%	0
Marks & Spencer	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ocado	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local farm	27.6%	2	0.0%	0	0.0%	0	0.0%	0	44.4%	2
Co-Op	6.9%	0	0.0%	0	0.0%	0	0.0%	0	11.1%	0
Local post office	6.9%	0	0.0%	0	0.0%	0	0.0%	0	11.1%	0
(Don't know / can't remember)	20.7%	1	0.0%	0	0.0%	0	0.0%	0	33.3%	1
Weighted base:		6		2		1		0		4
Sample:		8		2		1		0		5

Q15 When you undertook the top-up shopping trip at (STORE MENTIONED AT Q13), did you link your trip with any other activity?
Those who do top-up shopping at Q12 excluding those who said 'Internet / delivery' or '(Don't know / can't remember)' at Q13

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Yes – NON-FOOD shopping	7.6%	26	5.3%	7	12.4%	9	9.5%	7	4.7%	3
Yes – other FOOD shopping	2.5%	9	2.6%	4	6.1%	4	1.1%	1	0.0%	0
Yes – visiting services such as banks and other financial institutions	1.8%	6	1.8%	2	0.0%	0	5.0%	4	0.0%	0
Yes – leisure activity	3.2%	11	2.8%	4	3.9%	3	1.6%	1	5.3%	3
Yes – visiting café / pub / restaurant	4.9%	17	4.1%	6	7.1%	5	7.7%	6	0.7%	0
Yes – visiting other service such as hairdressers, beautician, laundrette etc	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Yes – travelling to / from work	4.3%	15	5.9%	8	1.6%	1	3.8%	3	4.8%	3
Yes – travelling to / from school / college / university	0.3%	1	0.3%	0	0.8%	1	0.0%	0	0.0%	0
Yes – getting petrol	0.6%	2	1.1%	2	0.0%	0	0.0%	0	0.7%	0
Yes – visiting family / friends	1.0%	3	1.0%	1	0.0%	0	0.6%	0	2.6%	2
Yes – visiting health service such as doctor, dentist, hospital	1.4%	5	2.2%	3	0.0%	0	2.2%	2	0.0%	0
Yes – other activity	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – library visit	1.0%	3	0.0%	0	0.8%	1	3.8%	3	0.0%	0
(No activity)	64.8%	225	65.5%	90	64.3%	46	52.3%	39	78.8%	49
(Don't know / varies)	6.6%	23	7.3%	10	3.1%	2	11.9%	9	2.4%	2
Weighted base:		347		138		71		75		62
Sample:		322		126		69		68		59

Q16 Where did you do this linked trip?

Those who said 'Non-food shopping', Other food shopping', Visiting services such as banks and other financial institutions', 'Leisure activity', 'Visiting café / pub / restaurant' or 'Visiting other services' at Q15 AND Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Baglan village centre	0.6%	0	1.8%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	3.0%	2	0.0%	0	10.2%	2	0.0%	0	0.0%	0
Briton Ferry Town Centre	1.9%	1	5.4%	1	0.0%	0	0.0%	0	0.0%	0
Cwmafan village centre	1.9%	1	0.0%	0	2.6%	1	4.3%	1	0.0%	0
Maesteg Town Centre	2.9%	2	0.0%	0	0.0%	0	2.2%	0	24.8%	2
Margam local centre	0.6%	0	0.0%	0	0.0%	0	2.2%	0	0.0%	0
Neath Town Centre	21.8%	16	14.5%	4	55.3%	12	2.2%	0	0.0%	0
Port Talbot Town Centre	36.6%	26	55.2%	14	2.6%	1	62.4%	12	0.0%	0
Swansea City Centre	3.4%	2	1.8%	0	9.3%	2	0.0%	0	0.0%	0
Aberafan Shopping Centre, Port Talbot SA13 1PB	4.9%	3	0.0%	0	0.0%	0	18.2%	3	0.0%	0
Baglan Bay Retail Park, Christchurch Rd, Port Talbot SA12 8BZ	3.0%	2	8.8%	2	0.0%	0	0.0%	0	0.0%	0
The Range, Trallwn Rd, Llansamlet, Swansea SA7 9WL	1.9%	1	5.4%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Castle Street, Maesteg, CF34 9UN	1.9%	1	5.4%	1	0.0%	0	0.0%	0	0.0%	0
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.8%	1	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	0.8%	1	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Pyle Garden Centre, Heol Mostyn, Village Farm Industrial Estate, Pyle, Bridgend CF33 6BJ	1.7%	1	0.0%	0	0.0%	0	6.5%	1	0.0%	0
Bargoed	2.3%	2	0.0%	0	0.0%	0	0.0%	0	24.8%	2
M&S, Green Street East Street 16, Neath SA11 1DH	3.5%	3	0.0%	0	12.0%	3	0.0%	0	0.0%	0
M&S, Oxford St, Swansea SA1 3BB	0.8%	1	0.0%	0	2.6%	1	0.0%	0	0.0%	0
North Cornelly	1.8%	1	0.0%	0	0.0%	0	0.0%	0	19.2%	1
Porthcawl	0.6%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	0
Pyle	0.6%	0	1.8%	0	0.0%	0	0.0%	0	0.0%	0
Village Farm Industrial Estate, Pyle, Bridgend CF33 6BJ	2.3%	2	0.0%	0	0.0%	0	0.0%	0	24.8%	2
(Don't know / can't remember)	0.6%	0	0.0%	0	0.0%	0	2.2%	0	0.0%	0
Weighted base:		72		25		21		19		7
Sample:		67		25		19		18		5

Q17 Where did you undertake your 'top up' food shopping the time before last?

Those who do top-up shopping at Q12 excluding those who said '(Don't know / can't remember)' at Q13 AND Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi, Commercial Road, Port Talbot, SA13 1LG	4.0%	13	5.3%	7	0.0%	0	8.7%	6	0.0%	0
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Castle Street, Maesteg, CF34 9UN	0.5%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Asda, Coychurch Rd, Bridgend CF31 3AG	0.6%	2	0.0%	0	0.0%	0	0.0%	0	3.4%	2
Asda, Ffald Road Shopping Centre, Pyle, Bridgend, CF33 6BH	6.1%	21	0.3%	0	0.0%	0	0.0%	0	32.8%	20
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.9%	3	2.0%	3	0.0%	0	0.6%	0	0.0%	0
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.3%	1	0.3%	0	0.0%	0	0.6%	0	0.0%	0
Co-Op Food, Cwmavon, Heol Jiwbill, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	2.1%	7	0.0%	0	0.0%	0	9.7%	7	0.0%	0
Co-Op Food, Penllyn, Cwmavon, Port Talbot, SA12 9NW	3.3%	11	1.2%	2	0.0%	0	13.2%	10	0.0%	0
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	2.0%	7	0.0%	0	0.0%	0	9.0%	7	0.0%	0
Costcutter, Fairway, Port Talbot, SA12 7HR	0.5%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	0.6%	2	0.0%	0	0.0%	0	0.0%	0	3.1%	2
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	2.5%	8	5.3%	7	0.0%	0	2.0%	1	0.0%	0
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	4.3%	14	5.8%	8	2.8%	2	6.0%	4	0.7%	0
Iceland, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	0.9%	3	2.4%	3	0.0%	0	0.0%	0	0.0%	0
Iceland, Old Market Street, Neath, SA11 3NA	0.9%	3	0.0%	0	4.3%	3	0.0%	0	0.0%	0
Lidl, Briton Ferry Road, Neath, SA11 1AS	3.0%	10	1.4%	2	11.7%	8	0.0%	0	0.0%	0
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	2.4%	8	5.0%	7	0.0%	0	2.0%	1	0.0%	0
Morrisons, Angel Street, Neath, SA11 1RS	3.1%	10	1.2%	2	9.4%	7	2.8%	2	0.0%	0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	7.0%	23	12.8%	17	3.1%	2	5.9%	4	0.0%	0
Tesco Express, Cimla Road, Neath, SA11 3UG	1.0%	3	0.0%	0	3.0%	2	1.7%	1	0.0%	0
Tesco Express, Langdon Road, Swansea, SA1 8QY	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	1.4%	5	0.3%	0	5.9%	4	0.0%	0	0.0%	0
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	0.7%	2	1.3%	2	0.8%	1	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	1.0%	3	0.0%	0	0.0%	0	2.2%	2	2.7%	2
Tesco Superstore, Neath Abbey Road, Neath, SA10	0.7%	2	0.0%	0	1.6%	1	1.7%	1	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
7FE										
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	14.3%	48	22.4%	29	3.6%	3	22.2%	16	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	0.8%	3	0.0%	0	0.0%	0	0.0%	0	4.2%	3
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	0.5%	2	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	2.1%	7	0.7%	1	8.6%	6	0.0%	0	0.0%	0
Local shops, Baglan village centre	1.1%	4	2.7%	4	0.0%	0	0.0%	0	0.0%	0
Local shops, Briton Ferry Town Centre	1.1%	4	0.0%	0	5.4%	4	0.0%	0	0.0%	0
Local shops, Cwmafan village centre	0.6%	2	0.0%	0	0.0%	0	2.6%	2	0.0%	0
Local shops, Maesteg Town Centre	0.6%	2	0.0%	0	0.0%	0	2.6%	2	0.0%	0
Local shops, Neath Town Centre	1.5%	5	0.0%	0	7.0%	5	0.0%	0	0.0%	0
Local shops, Pontardawe local centre	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Local shops, Port Talbot Town Centre	4.6%	16	10.7%	14	1.6%	1	0.6%	0	0.0%	0
Local shops, Swansea City Centre	0.7%	2	0.3%	0	2.8%	2	0.0%	0	0.0%	0
Aldi, Llandeilo Rd, Cross Hands, Llanelli SA14 6RD	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.6%	2	0.0%	0	0.0%	0	0.0%	0	3.1%	2
CKs Supermarket, Cimla Rd, Neath SA11 3UG	2.4%	8	0.0%	0	11.6%	8	0.0%	0	0.0%	0
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	0.6%	2	1.2%	2	0.0%	0	0.6%	0	0.0%	0
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	1.1%	4	0.0%	0	0.0%	0	0.0%	0	6.1%	4
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	0.9%	3	0.7%	1	0.0%	0	2.8%	2	0.0%	0
Local shops, Kenfig Hill	2.3%	8	0.0%	0	0.0%	0	0.0%	0	12.9%	8
Local shops, North Cornelly	1.7%	6	0.0%	0	0.0%	0	0.0%	0	9.3%	6
Local shops, Portcawl	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Local shops, Pyle	1.2%	4	0.0%	0	0.0%	0	0.0%	0	6.5%	4
M&S Green Street East Street 16, Neath SA11 1DH	3.5%	12	1.2%	2	14.6%	10	0.0%	0	0.0%	0
Premier, Forge Rd, Port Talbot SA13 1PG	0.5%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Quay Parade, Swansea SA1 8JA	0.8%	3	1.5%	2	0.8%	1	0.0%	0	0.0%	0
Spar (Aberavon), Dalton Rd, Port Talbot SA12 6TT	2.2%	8	5.7%	8	0.0%	0	0.0%	0	0.0%	0
Spar, Talbot Rd, Neath SA13 1DT	1.0%	3	1.2%	2	0.0%	0	2.3%	2	0.0%	0
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	2.1%	7	0.0%	0	0.0%	0	0.0%	0	11.7%	7
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.5%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Weighted base:		337		132		71		74		61
Sample:		310		119		68		66		57

Port Talbot Household Survey for Avison Young

Q18 Which retailer did you purchase that top-up food internet / home delivery shopping from?
Those who said 'Internet / delivery' at Q17

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Amazon Pantry	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland	51.5%	3	100.0%	1	100.1%	1	0.0%	0	30.0%	1
Marks & Spencer	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ocado	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local farm	34.6%	2	0.0%	0	0.0%	0	0.0%	0	50.0%	2
Co-Op	6.9%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	0
Local post office	6.9%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	0
(Don't know / can't remember)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		6		1		1		0		4
Sample:		8		1		1		0		6

Q19 When you undertook the top-up shopping trip at (STORE MENTIONED AT Q17), did you link your trip with any other activity?
Those who do top-up shopping at Q12 excluding those who said '(Don't know / can't remember)' at Q13, or 'Internet / delivery' or '(Don't know / can't remember)' at Q17

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Yes – NON-FOOD shopping	6.5%	22	8.8%	12	9.9%	7	1.1%	1	4.1%	3
Yes – other FOOD shopping	1.0%	3	0.7%	1	2.4%	2	0.6%	0	0.7%	0
Yes – visiting services such as banks and other financial institutions	2.4%	8	0.0%	0	6.9%	5	4.5%	3	0.0%	0
Yes – leisure activity	1.9%	6	2.2%	3	0.8%	1	1.7%	1	2.7%	2
Yes – visiting café / pub / restaurant	5.0%	17	4.1%	5	5.1%	4	10.0%	7	0.7%	0
Yes – visiting other service such as hairdressers, beautician, laundrette etc	0.5%	2	0.0%	0	0.8%	1	1.7%	1	0.0%	0
Yes – travelling to / from work	6.1%	21	6.1%	8	0.8%	1	9.9%	7	7.5%	5
Yes – travelling to / from school / college / university	0.1%	0	0.3%	0	0.0%	0	0.0%	0	0.0%	0
Yes – getting petrol	0.5%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Yes – visiting family / friends	2.1%	7	5.0%	7	0.0%	0	0.0%	0	0.7%	0
Yes – visiting health service such as doctor, dentist, hospital	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – other activity	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – library visit	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(No activity)	65.4%	221	62.1%	82	69.5%	49	58.2%	43	76.7%	47
(Don’t know / varies)	8.5%	29	9.6%	13	3.9%	3	12.2%	9	7.0%	4
Weighted base:		337		132		71		74		61
Sample:		310		119		68		66		57

Q20 Where did you do this linked trip?
Those who said 'Non-food shopping', Other food shopping', Visiting services such as banks and other financial institutions', 'Leisure activity', 'Visiting café / pub / restaurant' or 'Visiting other services' at Q19 AND Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Bridgend Town Centre	1.9%	1	0.0%	0	6.1%	1	0.0%	0	0.0%	0
Briton Ferry Town Centre	4.6%	3	0.0%	0	14.8%	3	0.0%	0	0.0%	0
Maesteg Town Centre	3.5%	2	0.0%	0	0.0%	0	2.6%	0	33.0%	2
Neath Town Centre	21.8%	13	15.5%	3	51.5%	9	2.6%	0	0.0%	0
Port Talbot Town Centre	38.5%	23	51.6%	10	3.0%	1	71.7%	11	8.5%	0
Swansea City Centre	3.3%	2	0.0%	0	10.7%	2	0.0%	0	0.0%	0
Aberafan Shopping Centre, Port Talbot SA13 1PB	9.7%	6	18.5%	4	0.0%	0	12.7%	2	0.0%	0
Baglan Bay Retail Park, Christchurch Rd, Port Talbot SA12 8BZ	3.3%	2	7.8%	2	0.0%	0	2.6%	0	0.0%	0
Bridgend Retail Park, Cowbridge Road, Waterton, Bridgend, CF31 3XX (Currys, Homebase, Home Bargains, Next, B&M)	2.8%	2	0.0%	0	0.0%	0	0.0%	0	33.0%	2
Kenfig Hill	0.7%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	0
M&S, Green Street East Street 16, Neath SA11 1DH	4.2%	3	0.0%	0	13.8%	3	0.0%	0	0.0%	0
Matalan, Foundry Rd, Morriston, Swansea SA6 8DU	2.2%	1	6.6%	1	0.0%	0	0.0%	0	0.0%	0
North Cornelly	0.7%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	0
Porthcawl	0.7%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	0
(Don't know / can't remember)	2.1%	1	0.0%	0	0.0%	0	7.8%	1	0.0%	0
Weighted base:		59		20		18		16		5
Sample:		52		17		16		13		6

Meanscore (£):

Q21 Thinking more generally, how much does your household spend on average on 'top up' food and grocery shopping in a week? Once again, top up grocery shopping includes 'basket shops' in foodstores, purchases from speciality retailers such as bakers, butchers and greengrocers, and snacks bought from shops.
Those who do top-up shopping at Q12

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
£1 - £5	9.8%	36	7.7%	11	15.1%	11	6.5%	5	12.3%	9
£6 - £10	17.9%	66	17.3%	25	22.2%	16	11.6%	9	21.5%	15
£11 - £15	11.8%	43	11.9%	17	10.6%	8	15.4%	12	9.0%	6
£16 - £20	13.0%	48	13.2%	19	9.0%	7	11.8%	9	18.0%	13
£21 - £25	6.1%	22	9.8%	14	1.5%	1	3.3%	2	6.0%	4
£26 - £30	14.3%	53	10.0%	15	13.2%	10	20.0%	15	18.3%	13
£31 - £35	2.3%	9	3.8%	6	1.5%	1	2.5%	2	0.0%	0
£36 - £40	3.5%	13	4.3%	6	1.5%	1	7.1%	5	0.0%	0
£41 - £45	1.5%	5	2.4%	4	0.8%	1	1.6%	1	0.0%	0
£46 - £50	1.7%	6	2.7%	4	0.8%	1	0.0%	0	2.3%	2
£51 - £60	0.5%	2	0.9%	1	0.0%	0	0.5%	0	0.0%	0
£61 - £70	0.6%	2	0.0%	0	0.8%	1	2.1%	2	0.0%	0
£71 - £80	0.6%	2	0.0%	0	0.0%	0	2.1%	2	0.6%	0
£81 - £90	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.3%	2
£91 - £100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£101 - £110	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£111 - £120	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£121 - £130	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£131 - £140	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£141 - £150	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£151 - £175	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£176 - £200	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£201 - £225	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£226 - £250	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£251 - £275	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£276 - £300	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£301+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	15.8%	58	16.0%	24	23.0%	17	14.8%	11	8.9%	6
(Refused)	0.2%	1	0.0%	0	0.0%	0	0.5%	0	0.6%	0
Mean:		*20.60*		*20.94*		*16.39*		*24.39*		*19.82*
Weighted base:		367		147		73		76		71
Sample:		343		133		72		69		69

Q22 Where did you last buy clothing or footwear goods?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Bridgend Town Centre	2.0%	7	0.0%	0	0.0%	0	2.3%	1	9.9%	5
Neath Town Centre	12.9%	43	2.9%	4	45.9%	36	4.9%	3	0.0%	0
Port Talbot Town Centre	15.2%	51	22.1%	31	0.7%	1	18.5%	12	14.2%	8
Swansea City Centre	19.8%	66	19.1%	26	21.4%	17	30.2%	19	6.8%	4
Aberafan Shopping Centre, Port Talbot SA13 1PB	2.6%	9	5.2%	7	0.0%	0	2.3%	1	0.0%	0
Baglan Bay Retail Park, Christchurch Rd, Port Talbot SA12 8BZ	0.3%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Llansamlet Shopping Centre, Swansea SA7 9AG	0.9%	3	1.8%	2	0.0%	0	0.7%	0	0.0%	0
Mcarthur Glen, Designer Outlet, Derwen, Bridgend CF32 9SU	14.2%	47	12.1%	17	10.0%	8	12.1%	8	28.2%	15
Morfa Retail Park, A4067 Quay Parade, Swansea SA1 2AL	4.5%	15	7.9%	11	2.8%	2	3.0%	2	0.0%	0
Parc Tawe Retail Park, A4067 Quay Parade, Swansea SA1 2AL	0.7%	2	0.3%	0	0.0%	0	3.2%	2	0.0%	0
Waterton Retail Park, Unit 6 to 7, Bridgend CF31 3TN	0.5%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0
Asda, Coychurch Rd, Bridgend CF31 3AG	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Asda, Ffald Road Shopping Centre, Pyle, Bridgend, CF33 6BH	1.4%	5	0.3%	0	0.0%	0	0.0%	0	7.9%	4
Morrisons, Angel Street, Neath, SA11 1RS	0.2%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	1.8%	6	2.3%	3	1.4%	1	2.6%	2	0.0%	0
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	1.0%	3	0.0%	0	4.2%	3	0.0%	0	0.0%	0
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	0.3%	1	0.3%	0	0.0%	0	0.7%	0	0.0%	0
Fforestfach Retail Park, Pontardulais Road, Cadle, Fforest Fach, Swansea (Boots, Next Outlet, Home Bargains)	0.6%	2	0.3%	0	0.0%	0	2.3%	1	0.0%	0
Cardiff City Centre	8.6%	29	10.5%	15	1.4%	1	7.6%	5	15.3%	8
Bridgend Retail Park, Cowbridge Road, Waterton, Bridgend, CF31 3XX (Currys, Homebase, Home Bargains, Next, B&M)	1.6%	5	1.1%	2	0.0%	0	0.0%	0	6.8%	4
Pyle Garden Centre, Heol Mostyn, Village Farm Industrial Estate, Pyle, Bridgend CF33 6BJ	0.1%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	1.2%	4	0.0%	0	5.0%	4	0.0%	0	0.0%	0
Cardiff Gate Retail Park, Pontprennau, Cardiff CF23 8NL	0.1%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Carmarthen	0.6%	2	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Cowbridge	0.8%	3	0.3%	0	0.0%	0	0.0%	0	3.9%	2
Culverhouse Cross, Cardiff CF5 5TG	0.7%	2	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Glastonbury	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Llanelli	0.1%	0	0.3%	0	0.0%	0	0.0%	0	0.0%	0
M&S, Green Street East	0.4%	1	0.0%	0	0.7%	1	0.7%	0	0.8%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Street 16, Neath SA11 1DH										
M&S, Oxford St, Swansea SA1 3BB	0.6%	2	0.3%	0	2.1%	2	0.0%	0	0.0%	0
Manchester	0.2%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Matalan, Foundry Rd, Morriston, Swansea SA6 8DU	1.3%	4	2.9%	4	0.0%	0	0.7%	0	0.0%	0
Morriston	0.1%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Parc Trostre Retail Park, Trostre Rd, Llanelli SA14 9UY	1.2%	4	2.5%	4	0.0%	0	0.7%	0	0.0%	0
Porthcawl	1.1%	4	0.0%	0	0.0%	0	3.2%	2	3.2%	2
Pyle	0.6%	2	0.0%	0	0.0%	0	2.5%	2	0.8%	0
Sainsbury's, Quay Parade, Swansea SA1 8JA	0.2%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Swindon	0.5%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.1%	0	0.3%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	0.5%	2	0.0%	0	2.1%	2	0.0%	0	0.0%	0
Weighted base:		333		139		78		63		53
Sample:		316		130		70		59		57

Q23 Where did you last buy books, CDs or DVDs ?

Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Bridgend Town Centre	5.6%	7	4.1%	2	0.0%	0	0.0%	0	22.8%	5
Briton Ferry Town Centre	0.8%	1	0.0%	0	2.1%	1	0.0%	0	2.1%	0
Neath Town Centre	12.8%	15	1.8%	1	32.1%	9	26.7%	6	0.0%	0
Port Talbot Town Centre	8.9%	10	17.6%	9	0.0%	0	5.9%	1	2.1%	0
Skewen local centre	1.3%	2	3.2%	2	0.0%	0	0.0%	0	0.0%	0
Swansea City Centre	21.4%	25	24.3%	12	25.1%	7	30.2%	6	0.0%	0
Mcarthur Glen, Designer Outlet, Derwen, Bridgend CF32 9SU	10.5%	12	10.4%	5	9.4%	3	12.8%	3	9.5%	2
Asda, Coychurch Rd, Bridgend CF31 3AG	0.4%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0
Asda, Ffald Road Shopping Centre, Pyle, Bridgend, CF33 6BH	2.7%	3	0.0%	0	0.0%	0	0.0%	0	15.6%	3
Lidl, Maesteg Rd, Tondu, Off CF32 9DF	0.4%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0
Morrisons, Angel Street, Neath, SA11 1RS	0.5%	1	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	5.1%	6	11.1%	6	0.0%	0	2.0%	0	0.0%	0
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	0.4%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	1.4%	2	0.0%	0	0.0%	0	7.6%	2	0.0%	0
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	4.4%	5	0.0%	0	17.8%	5	2.0%	0	0.0%	0
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	8.2%	10	16.6%	8	0.0%	0	6.9%	1	0.0%	0
Cardiff City Centre	2.9%	3	5.9%	3	2.1%	1	0.0%	0	0.0%	0
Asda, Longwood Dr, Coryton Roundabout, Cardiff CF14 7EW	1.7%	2	4.1%	2	0.0%	0	0.0%	0	0.0%	0
Asda, Murray St, Llanelli SA15 1BX	0.4%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	1.6%	2	0.0%	0	0.0%	0	0.0%	0	9.5%	2
Carmarthen	1.4%	2	0.0%	0	0.0%	0	0.0%	0	8.1%	2
Kenfig Hill	0.7%	1	0.0%	0	0.0%	0	0.0%	0	4.2%	1
North Cornelly	0.4%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0
Porthcawl	2.1%	3	0.0%	0	0.0%	0	0.0%	0	12.3%	3
Pyle	2.0%	2	0.0%	0	0.0%	0	2.0%	0	9.5%	2
Sainsbury's, Derwen, Bridgend CF32 9ST	2.1%	3	0.0%	0	9.4%	3	0.0%	0	0.0%	0
Weighted base:		118		50		27		21		20
Sample:		113		46		23		23		21

Q24 Where did you last buy small household goods such as home furnishings, clocks, jewellery, glass and china items?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Bridgend Town Centre	2.2%	5	1.6%	2	0.0%	0	0.0%	0	8.0%	4
Neath Town Centre	13.3%	32	11.4%	11	29.3%	16	8.2%	4	3.3%	2
Port Talbot Town Centre	13.7%	33	23.4%	23	4.7%	3	10.6%	5	7.3%	3
Swansea City Centre	8.5%	20	11.1%	11	4.7%	3	15.8%	7	0.0%	0
Aberafan Shopping Centre, Port Talbot SA13 1PB	1.4%	3	3.4%	3	0.0%	0	0.0%	0	0.0%	0
Baglan Bay Retail Park, Christchurch Rd, Port Talbot SA12 8BZ	0.2%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Llansamlet Shopping Centre, Swansea SA7 9AG	0.7%	2	0.0%	0	3.1%	2	0.0%	0	0.0%	0
Mcarthur Glen, Designer Outlet, Derwen, Bridgend CF32 9SU	2.0%	5	2.1%	2	0.0%	0	1.8%	1	4.2%	2
Morfa Retail Park, A4067 Quay Parade, Swansea SA1 2AL	3.6%	9	2.7%	3	3.1%	2	9.4%	4	0.0%	0
Parc Tawe Retail Park, A4067 Quay Parade, Swansea SA1 2AL	0.9%	2	0.0%	0	4.0%	2	0.0%	0	0.0%	0
Waterton Retail Park, Unit 6 to 7, Bridgend CF31 3TN	0.9%	2	0.0%	0	3.1%	2	0.9%	0	0.0%	0
Ikea, Ferry Rd, Cardiff CF11 0XR	3.1%	7	3.7%	4	4.0%	2	0.0%	0	3.6%	2
The Range, Carmarthen Rd, Cwmdu, Cwmbwrla, Swansea SA5 8LJ	0.7%	2	0.5%	0	0.0%	0	2.7%	1	0.0%	0
The Range, Trallwn Rd, Llansamlet, Swansea SA7 9WL	1.4%	3	2.3%	2	2.1%	1	0.0%	0	0.0%	0
The Range, Waterton Retail Park, Unit 6 to 7, Bridgend CF31 3TN	0.6%	2	0.0%	0	0.0%	0	0.0%	0	3.3%	2
Asda, Coychurch Rd, Bridgend CF31 3AG	0.6%	2	0.0%	0	0.0%	0	0.0%	0	3.3%	2
Asda, Ffald Road Shopping Centre, Pyle, Bridgend, CF33 6BH	1.9%	5	0.0%	0	0.0%	0	0.0%	0	10.4%	5
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.4%	1	0.5%	0	1.0%	1	0.0%	0	0.0%	0
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	2.6%	6	4.9%	5	3.1%	2	0.0%	0	0.0%	0
Morrisons, Angel Street, Neath, SA11 1RS	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	0.6%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	0.6%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea, SA1 8EP	0.5%	1	0.0%	0	0.0%	0	2.7%	1	0.0%	0
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	0.5%	1	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	2.4%	6	4.2%	4	0.0%	0	4.1%	2	0.0%	0
Pontardawe Retail Park, Ffordd Parc Ynysderw, Pontardawe (Poundstretcher, Home Bargains, Argos)	0.7%	2	0.0%	0	3.1%	2	0.0%	0	0.0%	0
B&M, Riverside Drive, Neath	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Fforestfach Retail Park, Pontardulais Road, Cadle, Fforest Fach, Swansea (Boots, Next Outlet, Home Bargains)	3.3%	8	0.5%	0	8.1%	4	7.1%	3	0.0%	0
Dunelm, Pontardulais Road, Cadle, Fforest Fach, Swansea	2.8%	7	4.6%	4	1.0%	1	3.6%	2	0.0%	0
Cardiff City Centre	6.4%	16	10.1%	10	3.1%	2	9.1%	4	0.0%	0
Dunelm, Waterton Road, Bridgend CF31 3XX	7.6%	18	0.9%	1	3.1%	2	4.4%	2	30.4%	14
Bridgend Retail Park, Cowbridge Road, Waterton, Bridgend, CF31 3XX (Currys, Homebase, Home Bargains, Next, B&M)	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Phoenix Retail Park, Llansamlet, Swansea SA7 9EH (Home Bargains, Poundworld)	0.9%	2	0.5%	0	0.0%	0	0.0%	0	3.6%	2
Pyle Garden Centre, Heol Mostyn, Village Farm Industrial Estate, Pyle, Bridgend CF33 6BJ	0.5%	1	0.0%	0	0.0%	0	2.7%	1	0.0%	0
Arthur Llewellyn Jenkins, Phoenix Way, Penllergaer, Swansea SA4 9WF	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.8%	2	0.0%	0	0.0%	0	0.0%	0	4.2%	2
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	0.2%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Cowbridge	0.6%	1	0.0%	0	0.0%	0	3.2%	1	0.0%	0
Cross Hands Retail Park, Llandeilo Rd, Cross Hands, Llanelli SA14 6NB	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Culverhouse Cross, Cardiff CF5 5TG	2.1%	5	3.7%	4	0.0%	0	3.2%	1	0.0%	0
Dunalem, Parc Plaza, Waterton Rd, Bridgend CF31 3XX	2.4%	6	0.0%	0	0.0%	0	8.0%	4	4.7%	2
Hernston Retail Park, Cowbridge Rd, Picton Gardens, Bridgend CF31 3XX	0.5%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	1
Llansamlet, Swansea	0.2%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
M&S, Oxford St, Swansea SA1 3BB	0.2%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
North Cornelly	0.8%	2	0.0%	0	0.0%	0	0.0%	0	4.2%	2
Parc Trostre Retail Park, Trostre Rd, Llanelli SA14 9UY	0.9%	2	0.0%	0	3.1%	2	0.9%	0	0.0%	0
Porthcawl	0.2%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Sainsbury's, Derwen, Bridgend CF32 9ST	2.1%	5	0.0%	0	9.3%	5	0.0%	0	0.0%	0
Sainsbury's, Quay Parade, Swansea SA1 8JA	1.4%	3	2.1%	2	0.0%	0	0.0%	0	2.8%	1
Tesco Extra, Cowbridge Rd, Bridgend CF31 3SQ	0.5%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	1
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.7%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Weighted base:		242		96		54		46		45
Sample:		223		86		51		46		40

Q25 Where did you last buy toys, games, bicycles or recreational / sports goods?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Bridgend Town Centre	1.5%	2	0.0%	0	0.0%	0	0.0%	0	17.5%	2
Margam local centre	1.2%	2	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Neath Town Centre	8.9%	12	0.0%	0	33.0%	12	0.0%	0	0.0%	0
Port Talbot Town Centre	21.1%	28	30.2%	18	5.6%	2	28.8%	8	3.9%	0
Swansea City Centre	10.8%	14	12.6%	7	7.1%	3	14.3%	4	3.9%	0
Aberafan Shopping Centre, Port Talbot SA13 1PB	3.1%	4	3.5%	2	1.6%	1	5.6%	1	0.0%	0
Baglan Bay Retail Park, Christchurch Rd, Port Talbot SA12 8BZ	1.9%	3	1.5%	1	0.0%	0	6.1%	2	0.0%	0
Llansamlet Shopping Centre, Swansea SA7 9AG	1.5%	2	3.5%	2	0.0%	0	0.0%	0	0.0%	0
Mcarthur Glen, Designer Outlet, Derwen, Bridgend CF32 9SU	5.9%	8	2.7%	2	7.1%	3	1.6%	0	29.0%	3
Morfa Retail Park, A4067 Quay Parade, Swansea SA1 2AL	7.8%	10	7.9%	5	7.1%	3	11.9%	3	0.0%	0
Parc Tawe Retail Park, A4067 Quay Parade, Swansea SA1 2AL	3.3%	4	0.8%	0	6.3%	2	6.1%	2	0.0%	0
Waterton Retail Park, Unit 6 to 7, Bridgend CF31 3TN	1.3%	2	0.0%	0	0.0%	0	0.0%	0	14.9%	2
Asda, Coychurch Rd, Bridgend CF31 3AG	0.3%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	0
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	1.8%	2	2.3%	1	1.6%	1	0.0%	0	3.9%	0
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	1.0%	1	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	0.4%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	1.4%	2	3.0%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	0.4%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	4.6%	6	6.9%	4	5.6%	2	0.0%	0	0.0%	0
Pontardawe Retail Park, Ffordd Parc Ynysderw, Pontardawe (Poundstretcher, Home Bargains, Argos)	0.4%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Fforestfach Retail Park, Pontardulais Road, Cadle, Fforest Fach, Swansea (Boots, Next Outlet, Home Bargains)	1.0%	1	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	3.6%	5	3.0%	2	1.6%	1	5.6%	1	7.7%	1
Dunelm, Waterton Road, Bridgend CF31 3XX	0.3%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	0
Phoenix Retail Park, Llansamlet, Swansea SA7 9EH (Home Bargains, Poundworld)	2.3%	3	4.2%	2	1.6%	1	0.0%	0	0.0%	0
Capital Retail Park, Leckwith Rd, Cardiff CF11 8EG	0.3%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff Gate Retail Park, Pontprennau, Cardiff CF23 8NL	0.3%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Cowbridge	0.3%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0
Culverhouse Cross, Cardiff CF5 5TG	1.0%	1	0.0%	0	0.0%	0	0.0%	0	11.6%	1
Giant Store, Castell Cl,	1.0%	1	2.3%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Llansamlet, Swansea SA7 9FH										
Morriston	1.0%	1	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Parc Trostre Retail Park, Trostre Rd, Llanelli SA14 9UY	0.9%	1	0.0%	0	0.0%	0	4.7%	1	0.0%	0
Porthcawl	0.7%	1	0.0%	0	1.6%	1	1.6%	0	0.0%	0
Pyle	1.6%	2	0.8%	0	0.0%	0	6.1%	2	0.0%	0
Smyths, St Davids Industrial Estate, Llansamlet, Swansea SA6 8RX	7.1%	9	3.7%	2	15.6%	5	6.1%	2	0.0%	0
Weighted base:		131		58		35		26		11
Sample:		113		50		30		21		12

Column %ges.

Q26 Where did you last buy chemist goods, including health and beauty products?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Baglan village centre	1.1%	5	2.9%	5	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	2.6%	11	0.0%	0	0.0%	0	0.0%	0	14.6%	11
Briton Ferry Town Centre	1.0%	4	0.0%	0	4.6%	4	0.0%	0	0.0%	0
Cwmafan village centre	3.6%	16	0.0%	0	0.0%	0	17.6%	16	0.0%	0
Maesteg Town Centre	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Neath Town Centre	16.0%	69	6.9%	12	53.3%	51	7.5%	7	0.0%	0
Port Talbot Town Centre	19.2%	83	31.5%	53	1.2%	1	31.7%	28	0.5%	0
Swansea City Centre	2.3%	10	3.8%	6	0.0%	0	3.7%	3	0.0%	0
Taibach local centre	1.4%	6	2.5%	4	0.0%	0	1.9%	2	0.0%	0
Aberafan Shopping Centre, Port Talbot SA13 1PB	4.1%	18	9.5%	16	0.0%	0	1.8%	2	0.0%	0
Baglan Bay Retail Park, Christchurch Rd, Port Talbot SA12 8BZ	0.9%	4	0.8%	1	0.0%	0	3.0%	3	0.0%	0
Llansamlet Shopping Centre, Swansea SA7 9AG	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Mcarthur Glen, Designer Outlet, Derwen, Bridgend CF32 9SU	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Morfa Retail Park, A4067 Quay Parade, Swansea SA1 2AL	0.4%	2	1.0%	2	0.0%	0	0.0%	0	0.0%	0
Aldi, Commercial Road, Port Talbot, SA13 1LG	1.6%	7	3.3%	6	0.0%	0	1.4%	1	0.0%	0
Aldi, Neath Abbey Rd, Neath SA10 7BR	0.8%	3	0.0%	0	3.5%	3	0.0%	0	0.0%	0
Asda, Coychurch Rd, Bridgend CF31 3AG	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Asda, Ffald Road Shopping Centre, Pyle, Bridgend, CF33 6BH	2.3%	10	0.0%	0	0.0%	0	0.0%	0	12.5%	10
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.1%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.1%	0	0.3%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Briton Ferry Road, Neath, SA11 1AS	0.3%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	2.0%	8	2.2%	4	1.7%	2	3.5%	3	0.0%	0
Lidl, Maesteg Rd, Tondu, Off CF32 9DF	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Morrisons, Angel Street, Neath, SA11 1RS	0.8%	4	0.0%	0	3.8%	4	0.0%	0	0.0%	0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	5.9%	25	9.0%	15	0.0%	0	11.3%	10	0.0%	0
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	1.3%	6	1.8%	3	0.0%	0	1.4%	1	1.6%	1
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	0.8%	3	0.0%	0	0.0%	0	1.8%	2	2.1%	2
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	3.2%	14	0.0%	0	13.3%	13	1.4%	1	0.0%	0
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	9.5%	41	18.3%	31	2.6%	3	8.6%	8	0.0%	0
B&M, Riverside Drive, Neath	0.4%	2	1.0%	2	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	0.7%	3	0.8%	1	0.0%	0	0.0%	0	1.9%	2
Bridgend Retail Park, Cowbridge Road,	0.7%	3	0.0%	0	0.0%	0	0.0%	0	3.8%	3

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Waterton, Bridgend, CF31 3XX (Currys, Homebase, Home Bargains, Next, B&M)										
Phoenix Retail Park, Llansamlet, Swansea SA7 9EH (Home Bargains, Poundworld)	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.5%	2
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	0.9%	4	0.9%	2	2.3%	2	0.0%	0	0.0%	0
Baglan Industrial Park, Port Talbot, SA12 7BZ	0.1%	0	0.3%	0	0.0%	0	0.0%	0	0.0%	0
Culverhouse Cross, Cardiff CF5 5TG	0.5%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	3.7%	16	0.0%	0	0.0%	0	0.0%	0	20.5%	16
North Cornelly	3.0%	13	0.0%	0	0.0%	0	0.0%	0	16.5%	13
Porthcawl	2.4%	10	0.0%	0	0.0%	0	0.0%	0	13.1%	10
Pyle	0.8%	3	0.0%	0	0.0%	0	0.0%	0	4.4%	3
Sainsbury's, Derwen, Bridgend CF32 9ST	1.2%	5	0.0%	0	5.3%	5	0.0%	0	0.0%	0
Sainsbury's, Quay Parade, Swansea SA1 8JA	1.3%	6	1.2%	2	3.8%	4	0.0%	0	0.0%	0
Talbot Green Shopping Park, Talbot Green, Pontyclun CF72 8LW	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Tenby	0.4%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Rd, Bridgend CF31 3SQ	0.6%	3	0.0%	0	0.0%	0	0.0%	0	3.2%	3
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.7%	3	0.9%	2	0.0%	0	1.6%	1	0.0%	0
Weighted base:		432		170		96		89		78
Sample:		416		158		87		87		84

Q27 Where did you last buy electrical items, such as televisions, washing machines and computers?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Baglan village centre	0.2%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	1.7%	4	0.0%	0	0.0%	0	1.0%	0	7.6%	3
Maesteg Town Centre	0.2%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0
Neath Town Centre	6.7%	15	1.9%	1	20.9%	13	0.0%	0	0.0%	0
Port Talbot Town Centre	16.1%	36	27.3%	19	8.9%	6	21.8%	9	3.7%	2
Swansea City Centre	2.4%	5	6.1%	4	1.7%	1	0.0%	0	0.0%	0
Aberafan Shopping Centre, Port Talbot SA13 1PB	1.3%	3	1.9%	1	0.0%	0	3.5%	1	0.0%	0
Baglan Bay Retail Park, Christchurch Rd, Port Talbot SA12 8BZ	0.8%	2	2.6%	2	0.0%	0	0.0%	0	0.0%	0
Llansamlet Shopping Centre, Swansea SA7 9AG	1.8%	4	2.9%	2	3.0%	2	0.0%	0	0.0%	0
Morfa Retail Park, A4067 Quay Parade, Swansea SA1 2AL	24.7%	54	29.2%	20	32.5%	21	31.3%	13	0.0%	0
Parc Tawe Retail Park, A4067 Quay Parade, Swansea SA1 2AL	2.7%	6	0.0%	0	7.2%	5	2.9%	1	0.0%	0
Waterton Retail Park, Unit 6 to 7, Bridgend CF31 3TN	0.7%	2	0.0%	0	0.0%	0	3.8%	2	0.0%	0
B&Q, Morfa Retail and Leisure Park, Bon-y-maen, Swansea SA1 7DF	0.2%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
The Range, Trallwn Rd, Llansamlet, Swansea SA7 9WL	0.6%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Coychurch Rd, Bridgend CF31 3AG	1.6%	4	2.9%	2	0.0%	0	0.0%	0	3.4%	2
Asda, Ffald Road Shopping Centre, Pyle, Bridgend, CF33 6BH	2.2%	5	0.0%	0	0.0%	0	0.0%	0	11.0%	5
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	0.2%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0
Lidl, Briton Ferry Road, Neath, SA11 1AS	0.9%	2	1.9%	1	0.9%	1	0.0%	0	0.0%	0
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	0.7%	2	0.0%	0	0.0%	0	3.8%	2	0.0%	0
Morrisons, Angel Street, Neath, SA11 1RS	0.3%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	1.5%	3	3.9%	3	0.9%	1	0.0%	0	0.0%	0
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	0.6%	1	0.6%	0	0.9%	1	1.0%	0	0.0%	0
Tesco Superstore, Crymlyn Burrows, Fabian Way, Crymlyn Burrows, Swansea, SA1 8EP	0.2%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	1.7%	4	0.0%	0	5.9%	4	0.0%	0	0.0%	0
Pontardawe Retail Park, Ffordd Parc Ynysderw, Pontardawe (Poundstretcher, Home Bargains, Argos)	0.8%	2	0.0%	0	2.6%	2	0.0%	0	0.0%	0
Dunelm, Pontardulais Road, Cadle, Fforest Fach, Swansea	0.6%	1	0.6%	0	0.9%	1	1.0%	0	0.0%	0
Cardiff City Centre	1.4%	3	2.5%	2	0.0%	0	3.5%	1	0.0%	0
Bridgend Retail Park, Cowbridge Road, Waterton, Bridgend, CF31 3XX (Currys, Homebase, Home Bargains, Next,	14.6%	32	2.6%	2	3.9%	3	0.0%	0	62.9%	28

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
B&M)										
Phoenix Retail Park, Llansamlet, Swansea SA7 9EH (Home Bargains, Poundworld)	1.5%	3	0.0%	0	2.6%	2	0.0%	0	3.7%	2
Pyle Garden Centre, Heol Mostyn, Village Farm Industrial Estate, Pyle, Bridgend CF33 6BJ	0.2%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Aberkenfig, Bridgend	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Brooklands Retail Park, Culverhouse Cross, Cardiff CF5 6XW	1.6%	3	2.9%	2	0.0%	0	3.5%	1	0.0%	0
Capital Retail Park, Leckwith Rd, Cardiff CF11 8EG	0.7%	2	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Enterprise 2000, Castell Cl, Llansamlet, Swansea SA7 9FH	0.3%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Euronics, Station Road, Port Talbot SA12 1NN	4.5%	10	3.2%	2	0.0%	0	18.3%	8	0.0%	0
Morriston	0.2%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
North Cornelly	0.2%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Parc Trostre Retail Park, Trostre Rd, Llanelli SA14 9UY	0.6%	1	0.0%	0	0.0%	0	2.9%	1	0.0%	0
Porthcawl	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Pyle	0.2%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Sainsbury's, Derwen, Bridgend CF32 9ST	1.1%	3	0.0%	0	3.9%	3	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Rd, Bridgend CF31 3SQ	0.2%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
(Don't know / can't remember)	0.5%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Weighted base:		221		69		65		42		44
Sample:		230		79		59		43		49

Q28 Where did you last buy furniture, carpets or floor coverings?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Bridgend Town Centre	0.7%	2	1.0%	1	0.0%	0	0.0%	0	1.9%	1
Briton Ferry Town Centre	1.1%	3	0.0%	0	1.8%	1	3.1%	1	0.0%	0
Neath Town Centre	6.6%	16	0.5%	0	23.9%	15	1.7%	1	0.0%	0
Pontardawe local centre	0.2%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Port Talbot Town Centre	16.2%	39	24.7%	21	4.5%	3	23.4%	11	8.0%	4
Skewen local centre	1.4%	3	0.0%	0	5.3%	3	0.0%	0	0.0%	0
Swansea City Centre	2.0%	5	3.5%	3	0.9%	1	0.9%	0	1.9%	1
Baglan Bay Retail Park, Christchurch Rd, Port Talbot SA12 8BZ	0.2%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Llansamlet Shopping Centre, Swansea SA7 9AG	4.4%	10	9.8%	9	3.2%	2	0.0%	0	0.0%	0
Morfa Retail Park, A4067 Quay Parade, Swansea SA1 2AL	5.3%	13	10.2%	9	4.1%	3	3.1%	1	0.0%	0
Parc Tawe Retail Park, A4067 Quay Parade, Swansea SA1 2AL	2.2%	5	0.5%	0	2.7%	2	6.5%	3	0.0%	0
Waterton Retail Park, Unit 6 to 7, Bridgend CF31 3TN	2.8%	7	2.3%	2	0.0%	0	1.7%	1	8.4%	4
B&Q, Morfa Retail and Leisure Park, Bon-y-maen, Swansea SA1 7DF	0.9%	2	2.5%	2	0.0%	0	0.0%	0	0.0%	0
B&Q, Royal London Park, Waterton Retail Park, Bridgend CF31 3TN	1.3%	3	1.5%	1	0.0%	0	0.0%	0	3.8%	2
Ikea, Ferry Rd, Cardiff CF11 0XR	9.0%	22	10.6%	9	10.5%	6	6.0%	3	7.2%	3
The Range, Trallwn Rd, Llansamlet, Swansea SA7 9WL	1.0%	2	2.0%	2	0.9%	1	0.0%	0	0.0%	0
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	5.0%	12	2.8%	2	7.6%	5	10.1%	5	0.0%	0
Internet / delivered	0.6%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
B&M, Riverside Drive, Neath	0.8%	2	1.5%	1	0.9%	1	0.0%	0	0.0%	0
Fforestfach Retail Park, Pontardulais Road, Cadle, Fforest Fach, Swansea (Boots, Next Outlet, Home Bargains)	0.6%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Dunelm, Pontardulais Road, Cadle, Fforest Fach, Swansea	0.2%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	1.3%	3	1.5%	1	0.0%	0	3.1%	1	1.0%	0
Dunelm, Waterton Road, Bridgend CF31 3XX	2.4%	6	0.0%	0	0.0%	0	4.3%	2	8.4%	4
Bridgend Retail Park, Cowbridge Road, Waterton, Bridgend, CF31 3XX (Currys, Homebase, Home Bargains, Next, B&M)	3.0%	7	0.0%	0	0.0%	0	0.0%	0	16.2%	7
Phoenix Retail Park, Llansamlet, Swansea SA7 9EH (Home Bargains, Poundworld)	4.9%	12	3.6%	3	7.3%	4	5.2%	2	3.7%	2
Aberkenfig, Bridgend	0.7%	2	0.0%	0	0.0%	0	0.0%	0	3.7%	2
Arthur Llewellyn Jenkins, Mwyndy Cross, Mwyndy, Cross, Pontyclun CF72 8PN	1.5%	4	0.0%	0	3.2%	2	2.6%	1	1.0%	0
Arthur Llewellyn Jenkins, Phoenix Way, Penllergaer, Swansea SA4 9WF	2.1%	5	0.5%	0	4.5%	3	3.1%	1	1.0%	0
Capital Retail Park, Leckwith Rd, Cardiff CF11 8EG	1.3%	3	3.6%	3	0.0%	0	0.0%	0	0.0%	0
Cross Hands Retail Park,	1.8%	4	2.5%	2	0.9%	1	3.4%	2	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Llandeilo Rd, Cross Hands, Llanelli SA14 6NB										
DFS, Bush Road, Morriston, Swansea SA6 8ER	2.2%	5	1.5%	1	3.6%	2	3.5%	2	0.0%	0
Dunalem, Parc Plaza, Waterton Rd, Bridgend CF31 3XX	0.2%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Gorseinon	0.2%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Kenfig Hill	1.2%	3	0.0%	0	0.0%	0	0.0%	0	6.5%	3
Leekes, Cowbridge Rd, Talbot Green, Pontyclun CF72 8XU	3.1%	8	2.3%	2	4.1%	3	3.1%	1	3.4%	2
Llanelli	0.2%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Llansamlet, Swansea	1.4%	3	0.0%	0	3.5%	2	2.6%	1	0.0%	0
Llantwit Major	0.2%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Nantiffyn Retail Park, Nantyffin Rd, Llansamlet, Swansea SA7 9RF	1.1%	3	2.1%	2	0.9%	1	0.9%	0	0.0%	0
North Cornelly	1.4%	3	0.0%	0	0.0%	0	0.0%	0	7.5%	3
Porthcawl	1.7%	4	0.0%	0	0.0%	0	0.0%	0	8.9%	4
Pyle	1.1%	3	0.5%	0	0.0%	0	0.9%	0	3.8%	2
Seager Retail Park, Newport Rd, Cardiff CF23 9AA	0.9%	2	0.0%	0	3.5%	2	0.0%	0	0.0%	0
Talbot Carpets, Talcennau Rd, Port Talbot SA13 1HY	0.9%	2	0.5%	0	0.9%	1	2.6%	1	0.0%	0
Trago Mills, Swansea Rd, Merthyr Tydfil CF48 1HT	1.8%	4	2.3%	2	0.0%	0	4.8%	2	0.0%	0
(Don't know / can't remember)	1.0%	3	0.0%	0	0.0%	0	2.6%	1	2.8%	1
Weighted base:		240		87		61		48		45
Sample:		228		81		52		46		49

Q29 Where did you last buy DIY or gardening goods?

Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Bridgend Town Centre	0.5%	2	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Cwmafan village centre	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Margam local centre	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Neath Town Centre	6.8%	21	2.6%	3	21.2%	15	4.9%	3	0.0%	0
Port Talbot Town Centre	7.4%	23	16.1%	18	0.0%	0	7.2%	5	0.7%	0
Aberafan Shopping Centre, Port Talbot SA13 1PB	2.4%	8	6.5%	7	0.0%	0	0.6%	0	0.0%	0
Baglan Bay Retail Park, Christchurch Rd, Port Talbot SA12 8BZ	3.1%	10	5.8%	7	0.0%	0	4.7%	3	0.0%	0
Llansamlet Shopping Centre, Swansea SA7 9AG	0.5%	2	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Parc Tawe Retail Park, A4067 Quay Parade, Swansea SA1 2AL	0.8%	3	0.4%	0	3.0%	2	0.0%	0	0.0%	0
B&Q, Morfa Retail and Leisure Park, Bon-y-maen, Swansea SA1 7DF	21.3%	67	20.6%	23	35.8%	25	26.8%	18	0.0%	0
B&Q, Royal London Park, Waterton Retail Park, Bridgend CF31 3TN	13.0%	41	6.1%	7	7.1%	5	8.7%	6	37.2%	23
Homebase, Unit 1, Bridgend Retail Park, Cowbridge Rd, Bridgend CF31 3XX	0.6%	2	1.2%	1	0.0%	0	0.0%	0	0.7%	0
The Range, Trallwn Rd, Llansamlet, Swansea SA7 9WL	0.8%	3	1.4%	2	0.8%	1	0.6%	0	0.0%	0
The Range, Waterton Retail Park, Unit 6 to 7, Bridgend CF31 3TN	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Wickes, Waterton Link Centre, Cowbridge Rd, Waterton Rd, Bridgend CF31 3XX	0.7%	2	0.0%	0	0.0%	0	2.7%	2	0.7%	0
Aldi, Commercial Road, Port Talbot, SA13 1LG	0.6%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Asda, Ffald Road Shopping Centre, Pyle, Bridgend, CF33 6BH	0.7%	2	0.0%	0	0.0%	0	0.0%	0	3.3%	2
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	1.8%	6	1.6%	2	0.8%	1	1.8%	1	3.1%	2
B&M, Baglan Bay Retail Park, Christchurch Rd, Neath, Port Talbot SA12 7BZ	10.8%	34	16.6%	19	7.1%	5	11.8%	8	3.3%	2
Lidl, Briton Ferry Road, Neath, SA11 1AS	0.7%	2	0.0%	0	3.1%	2	0.0%	0	0.0%	0
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	0.4%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Angel Street, Neath, SA11 1RS	0.8%	2	1.2%	1	1.6%	1	0.0%	0	0.0%	0
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	0.7%	2	1.2%	1	0.0%	0	0.6%	0	0.7%	0
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	1.2%	4	1.8%	2	0.0%	0	2.3%	2	0.0%	0
B&M, Riverside Drive, Neath	5.1%	16	3.9%	4	16.3%	12	0.0%	0	0.0%	0
Bridgend Retail Park, Cowbridge Road, Waterton, Bridgend, CF31 3XX (Currys, Homebase, Home Bargains, Next, B&M)	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Pyle Garden Centre, Heol Mostyn, Village Farm Industrial Estate, Pyle, Bridgend CF33 6BJ	2.5%	8	0.8%	1	0.0%	0	3.0%	2	7.9%	5
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.6%	2	0.0%	0	0.0%	0	0.0%	0	3.1%	2
B&Q, Cowbridge Rd W, Culverhouse Cross, Cardiff CF5 5TG	1.3%	4	3.6%	4	0.0%	0	0.0%	0	0.0%	0
B&Q, Trostre Retail Park, Parc, Trostre Rd, Llanelli SA14 9US	0.1%	0	0.4%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Swansea SA7 9FT	1.1%	3	0.8%	1	0.0%	0	3.5%	2	0.0%	0
Filco, Commercial Rd, Port Talbot SA13 1LG	0.5%	2	0.0%	0	0.0%	0	2.3%	2	0.0%	0
Kenfig Hill	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Leekes, Cowbridge Rd, Talbot Green, Pontyclun CF72 8XU	0.5%	1	0.0%	0	0.0%	0	2.1%	1	0.0%	0
Malvern	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
North Cornelly	0.9%	3	0.0%	0	0.0%	0	0.0%	0	4.5%	3
Pyle	2.3%	7	0.0%	0	0.0%	0	0.0%	0	11.5%	7
Sainsbury's, Derwen, Bridgend CF32 9ST	0.5%	2	0.0%	0	0.0%	0	0.0%	0	2.4%	2
Screwfix, Baglan Industrial Park, Aberavon Rd, Port Talbot SA12 7DJ	2.0%	6	1.6%	2	0.8%	1	5.7%	4	0.0%	0
Swansea Enterprise Park, Swansea, SA7 9RF	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Rd, Bridgend CF31 3SQ	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Village Farm Industrial Estate, Pyle, Bridgend CF33 6BJ	3.6%	11	0.0%	0	0.0%	0	2.9%	2	14.9%	9
(Don't know / can't remember)	2.2%	7	1.6%	2	0.8%	1	5.9%	4	0.7%	0
Weighted base:		313		111		71		69		62
Sample:		301		105		60		72		64

GEN Gender of respondent

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Male	23.5%	118	27.3%	56	23.7%	25	24.2%	24	14.4%	13
Female	76.5%	382	72.7%	149	76.3%	80	75.8%	74	85.6%	80
Weighted base:		500		205		104		98		93
Sample:		500		200		100		100		100

AGE Could I ask how old you are please?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
18 – 24 years	6.1%	30	6.9%	14	5.7%	6	6.0%	6	4.8%	5
25 – 34 years	14.8%	74	20.0%	41	7.5%	8	20.9%	21	4.8%	5
35 – 44 years	17.0%	85	23.7%	48	9.6%	10	13.4%	13	14.5%	13
45 – 54 years	18.5%	92	11.0%	22	18.6%	19	22.9%	23	30.1%	28
55 – 64 years	18.5%	92	15.7%	32	23.9%	25	16.5%	16	20.5%	19
65+ years	25.2%	126	22.7%	46	34.7%	36	20.3%	20	25.2%	23
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		500		205		104		98		93
Sample:		500		200		100		100		100

ZONE Zone:

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Zone 1	40.9%	205	100.0%	205	0.0%	0	0.0%	0	0.0%	0
Zone 2	20.8%	104	0.0%	0	100.0%	104	0.0%	0	0.0%	0
Zone 3	19.6%	98	0.0%	0	0.0%	0	100.0%	98	0.0%	0
Zone 4	18.6%	93	0.0%	0	0.0%	0	0.0%	0	100.0%	93
Weighted base:		500		205		104		98		93
Sample:		500		200		100		100		100

PC Postcode Sector

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
CF33 4	8.6%	43	0.0%	0	0.0%	0	0.0%	0	46.0%	43
CF33 6	10.1%	50	0.0%	0	0.0%	0	0.0%	0	54.0%	50
SA11 1	8.2%	41	0.0%	0	39.3%	41	0.0%	0	0.0%	0
SA11 2	12.6%	63	0.0%	0	60.7%	63	0.0%	0	0.0%	0
SA12 6	13.6%	68	33.2%	68	0.0%	0	0.0%	0	0.0%	0
SA12 7	9.8%	49	24.1%	49	0.0%	0	0.0%	0	0.0%	0
SA12 8	7.4%	37	18.0%	37	0.0%	0	0.0%	0	0.0%	0
SA12 9	8.3%	42	0.0%	0	0.0%	0	42.3%	42	0.0%	0
SA13 1	10.1%	50	24.7%	50	0.0%	0	0.0%	0	0.0%	0
SA13 2	11.3%	57	0.0%	0	0.0%	0	57.7%	57	0.0%	0
Weighted base:		500		205		104		98		93
Sample:		500		200		100		100		100

Column %ges.

Appendix V
Retail Capacity and Impact Tables

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT

TABLE 1. TURNOVER OF PROPOSED DEVELOPMENT

Proposed new Aldi foodstore, Land North of Afan Way, Aberavon, Port Talbot		Gross Floorspace (sq. m)	Net Floorspace (sq. m)	Turnover per sq. m in 2021 (£m)	Period to Test Year					
					2021	2022	2023	2024	2025	2026
Aldi Foodstore	Convenience	1,931	1,075	£11,199	£12.04	£11.11	£11.49	£11.81	£11.83	£11.84
	Comparison		269	£7,876	£2.12	£2.19	£2.19	£2.18	£2.22	£2.27
	Total		**1,344**	-	**£14.16**	**£13.30**	**£13.68**	**£13.99**	**£14.05**	**£14.10**

Notes:

a. Gross floorspace of proposed Aldi foodstore sourced from architectural drawings

b. Net sales area and convenience goods / comparison goods floorspace split of Aldi provided by operator

c. Sales density for Aldi Stores Ltdo derived from GlobalData 'Convenience and Comparison Goods Sales Densities of Major Grocers' (2021 Edition), published December 2021.

e. Turnovers projected forwards using Experian forecast sales densities from Figures 4a and 4b (Page 16) of Experian Retail Planner Briefing Note 20 (February 2023)

2021 Prices

TABLE 2(a): POPULATION WITHIN EACH ZONE

ZONE	POPULATION					
	2021	2022	2023	2024	2025	2026
Zone 1	31853	32213	32285	32351	32385	32408
Zone 2	16358	16543	16611	16673	16725	16758
Zone 3	15005	15177	15241	15300	15334	15373
Zone 4	14976	15115	15180	15251	15315	15384
TOTAL	78,192	79,048	79,317	79,575	79,759	79,923

Notes:
a. Postcode sectors SA12 6, SA12 7, SA12 8 and SA13 1 represent Zone 1 and the scheme's Primary Catchment Area (PCA). Study Area includes postcode sectors SA11 1 and SA11 2 (Zone 2), SA12 9 and SA13 2 (Zone 3) and CF33 4 and CF33 6 (Zone 4).
b. Base population derived from Experian Location Analyst data (March 2023 Report)
c. Base year taken as 2023 and test/design year as 2026

TABLE 2(b): PER CAPITA CONVENIENCE EXPENDITURE WITHIN STUDY AREA (EXCLUDING NON STORE RETAIL TRADE DEDUCTION)

ZONE	CONVENIENCE GOODS EXPENDITURE PER HEAD (EXCLUDING NSRT DEDUCTION)					
	2021	2022	2023	2024	2025	2026
Zone 1	£2,498	£2,331	£2,275	£2,266	£2,266	£2,268
Zone 2	£2,450	£2,286	£2,231	£2,222	£2,222	£2,224
Zone 3	£2,590	£2,416	£2,358	£2,349	£2,349	£2,351
Zone 4	£2,485	£2,319	£2,263	£2,254	£2,254	£2,256
ANNUAL GROWTH	-	-6.7%	-2.4%	-0.4%	0.0%	0.1%

Notes:
a. Per capita expenditure derived from Experian Location Analyst data (March 2023 Report)
b. Expenditure excludes Non Store Retail Trade in line with 'adjusted' allowance derived from Figure 5, Appendix 3 of Experian Retail Planner Briefing Note 20 (Feb 2023)
2021 Prices

TABLE 2(c): PER CAPITA CONVENIENCE EXPENDITURE WITHIN STUDY AREA (INCLUDING NON STORE RETAIL TRADE DEDUCTION)

ZONE	CONVENIENCE GOODS EXPENDITURE PER HEAD (INCLUDING NSRT DEDUCTION)					
	2021	2022	2023	2024	2025	2026
Zone 1	£2,353	£2,195	£2,147	£2,132	£2,125	£2,123
Zone 2	£2,308	£2,153	£2,106	£2,091	£2,084	£2,082
Zone 3	£2,440	£2,276	£2,226	£2,210	£2,203	£2,201
Zone 4	£2,341	£2,184	£2,136	£2,121	£2,114	£2,112
ANNUAL DEDUCTION	5.8%	5.8%	5.6%	5.9%	6.2%	6.4%

Notes:
a. Per capita expenditure derived from Experian Location Analyst data (March 2023 Report)
b. Expenditure excludes Non Store Retail Trade in line with 'adjusted' allowance derived from Figure 5, Appendix 3 of Experian Retail Planner Briefing Note 20 (Feb 2023)
2021 Prices

TABLE 2(d): TOTAL CONVENIENCE GOODS EXPENDITURE WITHIN STUDY AREA

ZONE	TOTAL CONVENIENCE GOODS EXPENDITURE (£m)					
	2021	2022	2023	2024	2025	2026
Zone 1	£74.95	£70.72	£69.33	£68.97	£68.82	£68.79
Zone 2	£37.75	£35.62	£34.98	£34.86	£34.86	£34.89
Zone 3	£36.61	£34.55	£33.93	£33.82	£33.79	£33.83
Zone 4	£35.06	£33.01	£32.43	£32.34	£32.38	£32.49
TOTAL	£184.37	£173.90	£170.67	£170.00	£169.85	£170.00

Notes:
a. Total available expenditure (2(d)) calculated by multiplying population from Table 2(a) by expenditure per head (minus NSRT deduction) from Table 2(c)
2021 Prices

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT
TABLE 3: CONVENIENCE GOODS SHOPPING PATTERNS (%)

STORE/ CENTRE	FIRST CHOICE MAIN FOOD SHOPPING				SECOND CHOICE MAIN FOOD SHOPPING				FIRST CHOICE TOP UP FOOD SHOPPING				SECOND CHOICE TOP UP FOOD SHOPPING			
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 1	Zone 2	Zone 3	Zone 4	Zone 1	Zone 2	Zone 3	Zone 4
Zone 1 (SA12 6, SA12 7, SA12 8 and SA13 1)																
Port Talbot Town Centre																
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	0.00%	0.00%	1.75%	0.00%	0.00%	0.00%	1.79%	0.00%	0.00%	0.00%	2.68%	0.00%	1.99%	0.00%	0.56%	0.00%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.55%	2.75%	8.33%	0.00%	5.81%	2.77%	5.98%	0.69%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	0.81%	0.00%	0.00%	0.00%	0.00%	0.00%	0.46%	0.00%	0.97%	0.00%	0.00%	0.00%	0.68%	0.00%	2.75%	0.00%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	28.20%	3.03%	30.43%	1.54%	31.08%	3.10%	28.47%	0.50%	21.74%	0.78%	21.31%	0.00%	22.39%	3.56%	22.15%	0.00%
Local shops, Port Talbot Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	11.52%	0.78%	4.14%	0.00%	10.68%	1.57%	0.56%	0.00%
Commercial Road District Centre																
Aldi, Commercial Road, Port Talbot, SA13 1LG	15.59%	2.19%	10.73%	5.50%	14.16%	2.24%	9.95%	8.90%	5.06%	0.00%	11.15%	0.68%	5.29%	0.00%	8.68%	0.00%
Local shops, Taibach local centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	0.00%	0.00%	2.20%	0.00%	0.00%	0.00%	2.25%	0.00%	1.15%	0.00%	2.13%	0.00%	1.20%	0.00%	0.56%	0.00%
Fairway Sandfields, Local Centre																
Costcutter, Fairway, Port Talbot, SA12 7HR	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.26%	0.00%	0.00%	0.00%	1.31%	0.00%	0.00%	0.00%
Pentwyn Bagan Road, Baglan, Local Centre																
Local shops, Baglan village centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.32%	0.00%	0.00%	0.00%	2.71%	0.00%	0.00%	0.00%
Out of Centre																
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	3.44%	0.55%	0.00%	2.32%	2.87%	2.23%	0.00%	0.00%	4.90%	0.00%	1.95%	0.00%	7.68%	0.00%	1.99%	0.00%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	9.90%	2.74%	3.19%	1.54%	9.98%	1.12%	9.97%	1.00%	6.14%	3.53%	1.95%	0.00%	5.04%	0.00%	1.99%	0.00%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	24.98%	6.02%	21.92%	1.03%	25.98%	5.59%	19.24%	2.94%	13.06%	4.67%	4.14%	2.65%	12.82%	3.13%	5.94%	0.00%
Other	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	8.54%	0.78%	0.55%	0.00%	8.48%	0.00%	2.82%	0.00%
Zone 1 TOTAL	**82.92%**	**14.52%**	**70.20%**	**11.92%**	**84.06%**	**14.27%**	**72.13%**	**13.33%**	**85.21%**	**13.29%**	**58.33%**	**3.33%**	**86.08%**	**11.03%**	**54.01%**	**0.69%**
Zone 2 (SA11 1 and SA11 2)																
Neath Town Centre																
Local shops, Neath Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.67%	0.00%	0.00%	0.00%	6.96%	0.00%	0.00%
Morrisons, Angel Street, Neath, SA11 1RS	1.49%	20.93%	0.00%	0.00%	1.56%	21.57%	1.39%	0.00%	1.15%	9.34%	1.10%	0.00%	1.20%	9.41%	2.82%	0.00%
M&S Green Street East Street 16, Neath SA11 1DH	0.46%	0.55%	0.00%	0.00%	0.00%	2.24%	0.00%	0.00%	1.47%	10.16%	0.00%	0.00%	1.20%	14.59%	0.00%	0.00%
Briton Ferry Town Centre/Neath Road District Centre																
Local shops, Briton Ferry Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6.13%	0.00%	0.00%	0.00%	5.39%	0.00%	0.00%
Out of Centre																
Lidl, Briton Ferry Road, Neath, SA11 1AS	1.26%	9.53%	1.59%	0.00%	1.79%	10.85%	1.64%	0.00%	0.97%	12.36%	0.00%	0.00%	1.36%	11.67%	0.00%	0.00%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	0.69%	2.12%	0.00%	0.00%	0.48%	0.00%	0.00%	0.00%	1.58%	7.00%	0.00%	0.00%	0.68%	8.63%	0.00%	0.00%
Zone 2 TOTAL	**3.90%**	**33.13%**	**1.59%**	**0.00%**	**3.83%**	**34.66%**	**3.02%**	**0.00%**	**5.17%**	**49.66%**	**1.10%**	**0.00%**	**4.43%**	**56.64%**	**2.82%**	**0.00%**
Zone 3 (SA12 9 and SA13 2)																
Cwmavon, Local Centre																
Co-Op Food, Cwmavon, Heol Jiwbill, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	0.00%	0.00%	1.75%	0.00%	0.00%	0.00%	1.79%	0.00%	1.15%	0.00%	22.35%	0.00%	1.20%	0.00%	22.93%	0.00%
Local shops, Cwmafan village centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.95%	0.00%	0.00%	0.00%	2.56%	0.00%
Margam Local Centre																
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6.64%	0.00%	0.00%	0.00%	8.99%	0.00%
Local shops, Margam local centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 3 TOTAL	**0.00%**	**0.00%**	**1.75%**	**0.00%**	**0.00%**	**0.00%**	**1.79%**	**0.00%**	**1.15%**	**0.00%**	**30.94%**	**0.00%**	**1.20%**	**0.00%**	**34.48%**	**0.00%**
Zone 4 (CF33 4 and CF33 6)																
Pyle District Centre																
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	0.81%	0.00%	1.59%	47.19%	0.24%	0.00%	1.64%	49.09%	0.32%	0.00%	0.00%	40.87%	0.34%	0.00%	0.00%	35.99%
Local shops, Pyle	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6.43%	0.00%	0.00%	0.00%	6.52%
Kenfig Hill District Centre																
Local shops, Kenfig Hill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	12.73%	0.00%	0.00%	0.00%	12.90%
North Cornelly Local Service Centre																
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.10%	0.00%	0.00%	0.00%	3.14%
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.50%	0.00%	0.00%	0.00%	6.06%	0.00%	0.00%	0.00%	6.15%
Local shops, North Cornelly	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.50%	0.00%	0.00%	0.00%	9.84%	0.00%	0.00%	0.00%	9.29%
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	0.00%	0.00%	0.00%	1.81%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	11.58%	0.00%	0.00%	0.00%	11.74%
Zone 4 TOTAL	**0.81%**	**0.00%**	**1.59%**	**49.00%**	**0.24%**	**0.00%**	**1.64%**	**50.09%**	**0.32%**	**0.00%**	**0.00%**	**90.60%**	**0.34%**	**0.00%**	**0.00%**	**85.72%**
OUTSIDE STUDY AREA																
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	0.00%	0.00%	0.00%	3.97%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	0.68%	0.00%	1.35%	0.00%	0.00%	0.00%	1.39%	0.00%	0.00%	0.00%	0.00%	0.00%	1.02%	0.00%	0.00%	0.00%
Aldi, Neath Abbey Rd, Neath SA10 7BR	0.00%	8.75%	4.00%	0.00%	0.00%	5.59%	3.64%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Asda, Coychurch Rd, Bridgend CF31 3AG	0.00%	0.00%	0.00%	3.52%	0.00%	0.00%	0.00%	3.93%	0.00%	0.00%	0.00%	0.68%	0.00%	0.00%	0.00%	3.38%
Farmfoods, Pentre Felin Retail Park, Tondu, Bridgend, CF32 9GP	0.00%	0.00%	0.00%	2.83%	0.00%	0.00%	0.00%	2.76%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Old Market Street, Neath, SA11 3NA	0.00%	0.00%	0.00%	0.00%	0.00%	2.54%	0.00%	0.00%	0.00%	7.32%	0.00%	0.00%	0.00%	4.34%	0.00%	0.00%
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	1.57%	0.55%	1.35%	0.00%	0.92%	2.79%	1.39%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.79%	0.00%	0.00%
Lidl, Maesteg Rd, Tondu, Off CF32 9DF	0.00%	0.00%	0.00%	1.03%	0.00%	0.00%	0.00%	1.94%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Tesco Express, Cimla Road, Neath, SA11 3UG	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.35%	1.65%	0.00%	0.00%	3.04%	1.69%	0.00%
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.15%	9.38%	0.00%	0.00%	0.34%	5.91%	0.00%	0.00%
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	3.85%	5.22%	4.05%	1.53%	2.83%	3.66%	4.16%	1.50%	0.00%	0.00%	0.00%	0.00%	1.31%	0.79%	0.00%	0.00%
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	0.00%	0.00%	0.45%	0.00%	0.00%	0.56%	0.00%	0.00%	0.97%	0.00%	0.00%	2.65%	0.00%	0.00%	2.19%	2.69%
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	0.00%	26.57%	3.60%	0.00%	0.00%	23.31%	1.85%	0.00%	0.00%	1.56%	3.30%	0.00%	0.00%	1.57%	1.69%	0.00%
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	0.00%	0.00%	0.00%	8.40%	0.00%	0.00%	2.25%	7.69%	0.00%	0.00%	0.00%	2.05%	0.00%	0.00%	0.00%	4.15%
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	0.00%	0.00%	0.00%	1.98%	0.24%	0.00%	0.00%	3.87%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sainsbury's, Derwen, Bridgend CF32 9ST	0.00%	4.96%	1.75%	5.39%	0.84%	5.06%	0.00%	4.20%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	0.00%	0.00%	1.75%	3.07%	0.00%	0.00%	0.00%	2.50%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.69%
Local shops, Bridgend Town Centre	0.00%	0.00%	0.45%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.65%	0.00%	0.00%	0.00%	0.00%	0.00%
Local shops, Maesteg Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.50%	0.00%	0.00%	0.00%	2.56%	0.00%
Local shops, Swansea City Centre	0.23%	0.00%	0.00%	0.00%	0.24%	0.00%	0.00%	0.00%	1.30%	3.53%	0.00%	0.00%	0.34%	2.77%	0.00%	0.00%
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	0.00%	0.00%	3.63%	0.00%	0.71%	0.00%	2.09%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	1.14%	1.64%	0.00%	0.00%	1.79%	1.67%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
CKs Supermarket, Cimla Rd, Neath SA11 3UG	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	9.14%	0.00%	0.00%	0.00%	11.56%	0.00%	0.00%
Home Bargains, Market St, Bridgend CF31 1LL	0.00%	0.00%	0.00%	0.51%	0.00%	0.00%	0.00%	0.50%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Brackla St, Bridgend CF31 1DD	0.00%	0.00%	0.00%	1.81%	0.00%	0.00%	0.00%	2.27%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Local shops, Porthcawl	0.00%	0.00%	0.00%	3.52%	0.00%	0.00%	0.00%	3.43%	0.00%	0.00%	0.00%	0.68%	0.00%	0.00%	0.00%	0.69%
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.68%	0.00%	0.00%	0.00%	0.71%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	1.03%	0.00%	0.00%	0.00%	1.08%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	0.89%	0.00%	0.45%	0.00%	0.00%	0.56%	0.46%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Waitrose, Birds Ln, Cowbridge CF71 7YP	0.00%	0.00%	1.59%	0.00%	0.00%	0.00%	1.64%	0.00%	1.15%	0.00%	0.00%	0.00%	1.20%	0.00%	0.00%	0.00%
Other	0.00%	0.00%	0.00%	0.00%	0.71%	1.12%	0.00%	0.50%	2.12%	0.78%	0.55%	0.00%	2.21%	0.79%	0.56%	0.00%
OUTSIDE STUDY AREA - TOTAL	**12.37%**	**52.36%**	**24.86%**	**39.09%**	**11.88%**	**51.07%**	**21.42%**	**36.58%**	**8.14%**	**37.06%**	**9.64%**	**6.07%**	**7.95%**	**32.33%**	**8.69%**	**13.59%**

Note
Market shares taken from 2023 household survey. Only most popular stores shown under the sub-headings for each main location.

AVISON YOUNG

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT

TABLE 4: CONVENIENCE GOODS SHOPPING PATTERNS (£m) IN 2023

	FIRST CHOICE MAIN FOOD SHOPPING					SECOND CHOICE MAIN FOOD SHOPPING					FIRST CHOICE TOP UP FOOD SHOPPING					SECOND CHOICE TOP UP FOOD SHOPPING					TOTAL
STORE/CENTRE	Zone 1	Zone 2	Zone 3	Zone 4	TOTAL	Zone 1	Zone 2	Zone 3	Zone 4	TOTAL	Zone 1	Zone 2	Zone 3	Zone 4	TOTAL	Zone 1	Zone 2	Zone 3	Zone 4	TOTAL	
(£m)	69.3	35.0	33.9	32.4	170.7	69.3	35.0	33.9	32.4	170.7	69.3	35.0	33.9	32.4	170.7	69.3	35.0	33.9	32.4	170.7	
(£m)	35.0	17.2	18.4	17.3	87.9	15.0	7.4	7.9	7.4	37.7	13.5	7.3	5.4	5.4	31.6	5.8	3.1	2.3	2.3	13.5	
Zone 1 (SA12 6, SA12 7, SA12 8 and SA13 1)																					
Port Talbot Town Centre	**£10.1**	**£0.5**	**£5.9**	**£0.3**	**£16.8**	**£4.7**	**£0.2**	**£2.4**	**£0.0**	**£7.3**	**£5.4**	**£0.3**	**£2.0**	**£0.0**	**7.7**	**£2.4**	**£0.2**	**£0.7**	**£0.0**	**£3.4**	**£35.3**
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.0	£0.0	£0.3	£0.0	**£0.3**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.1	£0.0	**0.1**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£0.7**
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.8	£0.2	£0.4	£0.0	**1.4**	£0.3	£0.1	£0.1	£0.0	**£0.6**	**£2.0**
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.3	£0.0	£0.0	£0.0	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.1	£0.0	£0.0	£0.0	**0.1**	£0.0	£0.0	£0.1	£0.0	**£0.1**	**£0.6**
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£9.9	£0.5	£5.6	£0.3	**£16.2**	£4.7	£0.2	£2.2	£0.0	**£7.2**	£2.9	£0.1	£1.1	£0.0	**4.2**	£1.3	£0.1	£0.5	£0.0	**£1.9**	**£29.5**
Local shops, Port Talbot Town Centre	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£1.6	£0.1	£0.2	£0.0	**1.8**	£0.6	£0.0	£0.0	£0.0	**£0.7**	**£2.5**
Commercial Road District Centre																					
Aldi, Commercial Road, Port Talbot, SA13 1LG	£5.5	£0.4	£2.0	£1.0	**£8.8**	£2.1	£0.2	£0.8	£0.7	**£3.7**	£0.7	£0.0	£0.6	£0.0	**1.3**	£0.3	£0.0	£0.2	£0.0	**£0.5**	**£14.3**
Local shops, Taibach local centre	£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**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.0**
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.0	£0.0	£0.4	£0.0	**£0.4**	£0.0	£0.0	£0.2	£0.0	**£0.2**	£0.2	£0.0	£0.1	£0.0	**0.3**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£0.9**
Fairway Sandfields, Local Centre																					
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.2	£0.0	£0.0	£0.0	**0.2**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£0.2**
Pentwyn Bagan Road, Baglan, Local Centre																					
Local shops, Baglan village centre	£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	**0.7**	£0.2	£0.0	£0.0	£0.0	**£0.2**	**£0.9**
Out of Centre																					
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£1.2	£0.1	£0.0	£0.4	**£1.7**	£0.4	£0.2	£0.0	£0.0	**£0.6**	£0.7	£0.0	£0.1	£0.0	**0.8**	£0.4	£0.0	£0.0	£0.0	**£0.5**	**£3.6**
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£3.5	£0.5	£0.6	£0.3	**£4.8**	£1.5	£0.1	£0.8	£0.1	**£2.4**	£0.8	£0.3	£0.1	£0.0	**1.2**	£0.3	£0.0	£0.0	£0.0	**£0.3**	**£8.8**
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£8.7	£1.0	£4.0	£0.2	**£14.0**	£3.9	£0.4	£1.5	£0.2	**£6.0**	£1.8	£0.3	£0.2	£0.1	**2.5**	£0.7	£0.1	£0.1	£0.0	**£1.0**	**£23.5**
Other	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£1.2	£0.1	£0.0	£0.0	**£1.2**	£0.5	£0.0	£0.1	£0.0	**£0.6**	**£1.8**
Zone 1 TOTAL	**£29.0**	**£2.5**	**£12.9**	**£2.1**	**£46.5**	**£12.6**	**£1.1**	**£5.7**	**£1.0**	**£20.3**	**£11.5**	**£1.0**	**£3.1**	**£0.2**	**£15.8**	**£5.0**	**£0.3**	**£1.2**	**£0.0**	**£6.6**	**£89.2**
Zone 2 (SA11 1 and SA11 2)																					
Neath Town Centre																					
Local shops, Neath Town Centre	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.3	£0.0	£0.0	**0.3**	£0.0	£0.2	£0.0	£0.0	**£0.2**	**£0.6**
Morrisons, Angel Street, Neath, SA11 1RS	£0.5	£3.6	£0.0	£0.0	**£4.1**	£0.2	£1.6	£0.1	£0.0	**£1.9**	£0.2	£0.7	£0.1	£0.0	**0.9**	£0.1	£0.3	£0.1	£0.0	**£0.4**	**£7.4**
M&S Green Street East Street 16, Neath SA11 1DH	£0.2	£0.1	£0.0	£0.0	**£0.3**	£0.0	£0.2	£0.0	£0.0	**£0.2**	£0.2	£0.7	£0.0	£0.0	**0.9**	£0.1	£0.5	£0.0	£0.0	**£0.5**	**£1.9**
Briton Ferry Town Centre/Neath Road District Centre																					
Local shops, Briton Ferry Town Centre	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.4	£0.0	£0.0	**0.4**	£0.0	£0.2	£0.0	£0.0	**£0.2**	**£0.6**
Out of Centre																					
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.4	£1.6	£0.3	£0.0	**£2.4**	£0.3	£0.8	£0.1	£0.0	**£1.2**	£0.1	£0.9	£0.0	£0.0	**1.0**	£0.1	£0.4	£0.0	£0.0	**£0.4**	**£5.0**
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.2	£0.4	£0.0	£0.0	**£0.6**	£0.1	£0.0	£0.0	£0.0	**£0.1**	£0.2	£0.5	£0.0	£0.0	**0.7**	£0.0	£0.3	£0.0	£0.0	**£0.3**	**£1.7**
Zone 2 TOTAL	**£1.4**	**£5.7**	**£0.3**	**£0.0**	**£7.3**	**£0.6**	**£2.5**	**£0.2**	**£0.0**	**£3.4**	**£0.7**	**£3.6**	**£0.1**	**£0.0**	**£4.4**	**£0.3**	**£1.8**	**£0.1**	**£0.0**	**£2.1**	**£17.2**
Zone 3 (SA12 9 and SA13 2)																					
Cwmavon, Local Centre																					
Co-Op Food, Cwmavon, Heol Jiwbill, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	£0.0	£0.0	£0.3	£0.0	**£0.3**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.2	£0.0	£1.2	£0.0	**1.4**	£0.1	£0.0	£0.5	£0.0	**£0.6**	**£2.4**
Local shops, Cwmafan village centre	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.1	£0.0	**0.1**	£0.0	£0.0	£0.1	£0.0	**£0.1**	**£0.2**
Margam Local Centre																					
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.4	£0.0	**0.4**	£0.0	£0.0	£0.2	£0.0	**£0.2**	**£0.6**
Local shops, Margam local centre	£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**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.0**
Zone 3 TOTAL	**£0.0**	**£0.0**	**£0.3**	**£0.0**	**£0.3**	**£0.0**	**£0.0**	**£0.1**	**£0.0**	**£0.1**	**£0.2**	**£0.0**	**£1.7**	**£0.0**	**1.8**	**£0.1**	**£0.0**	**£0.8**	**£0.0**	**£0.9**	**£3.2**
Zone 4 (CF33 4 and CF33 6)																					
Pyle District Centre																					
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.0	£0.0	£0.3	£8.2	**£8.5**	£0.0	£0.0	£0.1	£3.6	**£3.8**	£0.0	£0.0	£0.0	£2.2	**2.2**	£0.0	£0.0	£0.0	£0.8	**0.8**	**£15.4**
Local shops, Pyle	£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	£0.3	**0.3**	£0.0	£0.0	£0.0	£0.1	**0.1**	**£0.5**
Kenfig Hill District Centre																					
Local shops, Kenfig Hill	£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	**0.7**	£0.0	£0.0	£0.0	£0.3	**0.3**	**£1.0**
North Cornelly Local Service Centre																					
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£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	£0.2	**0.2**	£0.0	£0.0	£0.0	£0.1	**0.1**	**£0.2**
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£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	£0.3	**0.3**	£0.0	£0.0	£0.0	£0.1	**0.1**	**£0.5**
Local shops, North Cornelly	£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	£0.5	**0.5**	£0.0	£0.0	£0.0	£0.2	**0.2**	**£0.8**
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.0	£0.0	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.6	**0.6**	£0.0	£0.0	£0.0	£0.3	**0.3**	**£1.2**
Zone 4 TOTAL	**£0.0**	**£0.0**	**£0.3**	**£8.5**	**£8.8**	**£0.0**	**£0.0**	**£0.1**	**£3.7**	**£3.9**	**£0.0**	**£0.0**	**£0.0**	**£4.9**	**4.9**	**£0.0**	**£0.0**	**£0.0**	**£2.0**	**2.0**	**£19.6**
BEYOND STUDY AREA																					
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.0	£0.0	£0.0	£0.7	**£0.7**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£0.9**
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.2	£0.0	£0.2	£0.0	**£0.5**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£0.7**
Aldi, Neath Abbey Rd, Neath SA10 7BR	£0.0	£1.5	£0.7	£0.0	**£2.2**	£0.0	£0.4	£0.3	£0.0	**£0.7**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£2.9**
Asda, Coychurch Rd, Bridgend CF31 3AG	£0.0	£0.0	£0.0	£0.6	**£0.6**	£0.0	£0.0	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.1	**£0.1**	**£1.0**
Farmfoods, Pentre Felin Retail Park, Tondu, Bridgend, CF32 9GP	£0.0	£0.0	£0.0	£0.5	**£0.5**	£0.0	£0.0	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.7**
Iceland, Old Market Street, Neath, SA11 3NA	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.2	£0.0	£0.0	**£0.2**	£0.0	£0.5	£0.0	£0.0	**£0.5**	£0.0	£0.1	£0.0	£0.0	**£0.1**	**£0.9**
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£0.5	£0.1	£0.2	£0.0	**£0.9**	£0.1	£0.2	£0.1	£0.0	**£0.5**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£1.4**
Lidl, Maesteg Rd, Tondu, Off CF32 9DF	£0.0	£0.0	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.3**
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.4	£0.1	£0.0	**£0.5**	£0.0	£0.1	£0.0	£0.0	**£0.1**	**£0.6**
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.2	£0.7	£0.0	£0.0	**£0.8**	£0.0	£0.2	£0.0	£0.0	**£0.2**	**£1.0**
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	£1.3	£0.9	£0.7	£0.3	**£3.3**	£0.4	£0.3	£0.3	£0.1	**£1.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£4.5**
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.1	£0.0	£0.0	£0.1	**£0.3**	£0.0	£0.0	£0.1	£0.1	**£0.1**	**£0.5**
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£0.0	£4.6	£0.7	£0.0	**£5.2**	£0.0	£1.7	£0.1	£0.0	**£1.9**	£0.0	£0.1	£0.2	£0.0	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.1**	**£7.5**
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.0	£0.0	£0.0	£1.5	**£1.5**	£0.0	£0.0	£0.2	£0.6	**£0.7**	£0.0	£0.0	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.1	**£0.1**	**£2.4**
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.0	£0.0	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.7**
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.0	£0.9	£0.3	£0.9	**£2.1**	£0.1	£0.4	£0.0	£0.3	**£0.8**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£2.9**
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	£0.0	£0.0	£0.3	£0.5	**£0.9**	£0.0	£0.0	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.1	**£0.1**	**£1.1**
Local shops, Bridgend Town Centre	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.2**
Local shops, Maesteg Town Centre	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.1	£0.0	**£0.1**	**£0.2**
Local shops, Swansea City Centre	£0.1	£0.0	£0.0	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.2	£0.3	£0.0	£0.0	**£0.4**	£0.0	£0.1	£0.0	£0.0	**£0.1**	**£0.7**
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.0	£0.0	£0.7	£0.0	**£0.7**	£0.1	£0.0	£0.2	£0.0	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.9**
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	£0.4	£0.3	£0.0	£0.0	**£0.7**	£0.3	£0.1	£0.0	£0.0	**£0.4**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£1.1**
CKs Supermarket, Cimla Rd, Neath SA11 3UG	£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	**£0.7**	£0.0	£0.4	£0.0	£0.0	**£0.4**	**£1.0**
Home Bargains, Market St, Bridgend CF31 1LL	£0.0	£0.0	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.1**
Iceland, Brackla St, Bridgend CF31 1DD	£0.0	£0.0	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.5**
Local shops, Porthcawl	£0.0	£0.0	£0.0	£0.6	**£0.6**	£0.0	£0.0	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.9**
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.2	£0.0	£0.0	£0.0	**£0.2**	£0.1	£0.0	£0.0	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.3**
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.4	£0.0	£0.0	£0.0	**£0.4**	£0.2	£0.0	£0.0	£0.0	**£0.2**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.5**
Sainsbury's, Quay Parade, Swansea SA1 8JA	£0.8	£0.8	£0.1	£0.3	**£2.0**	£0.3	£0.3	£0.2	£0.1	**£0.9**	£0.2	£0.0	£0.0	£0.0	**£0.2**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£3.2**
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.3	£0.0	£0.1	£0.0	**£0.4**	£0.0	£0.0	£0.0	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.5**
Waitrose, Birds Ln, Cowbridge CF71 7YP	£0.0	£0.0	£0.3	£0.0	**£0.3**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.2	£0.0	£0.0	£0.0	**£0.2**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£0.6**
Other	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.1	£0.1	£0.0	£0.0	**£0.2**	£0.3	£0.1	£0.0	£0.0	**£0.4**	£0.1	£0.0	£0.0	£0.0	**£0.2**	**£0.8**
Total	**£4.3**	**£9.0**	**£4.6**	**£6.8**	**£24.7**	**£1.8**	**£3.8**	**£1.8**	**£2.7**	**£10.1**	**£1.1**	**£2.7**	**£0.5**	**£0.3**	**£4.7**	**£0.5**	**£1.0**	**£0.2**	**£0.3**	**£2.0**	**£41.4**

Note.
Turnover calculated by applying market shares (Table 3) to available expenditure (Table 2d)
% split between main food and top up taken from hh survey Q12 answers

AVISON YOUNG

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT

TABLE 5: CONVENIENCE GOODS SHOPPING PATTERNS (£m) IN 2026

	FIRST CHOICE MAIN FOOD SHOPPING					SECOND CHOICE MAIN FOOD SHOPPING					FIRST CHOICE TOP UP FOOD SHOPPING					SECOND CHOICE TOP UP FOOD SHOPPING					TOTAL
STORE/CENTRE	Zone 1	Zone 2	Zone 3	Zone 4	TOTAL	Zone 1	Zone 2	Zone 3	Zone 4	TOTAL	Zone 1	Zone 2	Zone 3	Zone 4	TOTAL	Zone 1	Zone 2	Zone 3	Zone 4	TOTAL	
(£m)	68.8	34.9	33.8	32.5	170.0	68.8	34.9	33.8	32.5	170.0	68.8	34.9	33.8	32.5	170.0	68.8	34.9	33.8	32.5	170.0	
(£m)	34.7	17.1	18.3	17.4	87.5	14.9	7.3	7.8	7.4	37.5	13.4	7.3	5.4	5.4	31.5	5.8	3.1	2.3	2.3	13.5	
Zone 1 (SA12 6, SA12 7, SA12 8 and SA13 1)																					
Port Talbot Town Centre	**£10.1**	**£0.5**	**£5.9**	**£0.3**	**£16.7**	**£4.6**	**£0.2**	**£2.4**	**£0.0**	**£7.3**	**£5.3**	**£0.3**	**£2.0**	**£0.0**	**£7.6**	**£2.4**	**£0.2**	**£0.7**	**£0.0**	**£3.4**	**£35.1**
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.0	£0.0	£0.3	£0.0	**£0.3**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£0.7**
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.7	£0.2	£0.4	£0.0	**£1.4**	£0.3	£0.1	£0.1	£0.0	**£0.6**	**£2.0**
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.3	£0.0	£0.0	£0.0	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.1	£0.0	£0.0	£0.0	**£0.1**	£0.0	£0.0	£0.1	£0.0	**£0.1**	**£0.5**
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£9.8	£0.5	£5.6	£0.3	**£16.1**	£4.6	£0.2	£2.2	£0.0	**£7.1**	£2.9	£0.1	£1.1	£0.0	**£4.1**	£1.3	£0.1	£0.5	£0.0	**£1.9**	**£29.3**
Local shops, Port Talbot Town Centre	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£1.5	£0.1	£0.2	£0.0	**£1.8**	£0.6	£0.0	£0.0	£0.0	**£0.7**	**£2.5**
Commercial Road District Centre																					
Aldi, Commercial Road, Port Talbot, SA13 1LG	£5.4	£0.4	£2.0	£1.0	**£8.7**	£2.1	£0.2	£0.8	£0.7	**£3.7**	£0.7	£0.0	£0.6	£0.0	**£1.3**	£0.3	£0.0	£0.2	£0.0	**£0.5**	**£14.2**
Local shops, Taibach local centre	£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**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.0**
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.0	£0.0	£0.4	£0.0	**£0.4**	£0.0	£0.0	£0.2	£0.0	**£0.2**	£0.2	£0.0	£0.1	£0.0	**£0.3**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£0.9**
Fairway Sandfields, Local Centre																					
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.2	£0.0	£0.0	£0.0	**£0.2**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£0.2**
Pentwyn Bagan Road, Baglan, Local Centre																					
Local shops, Baglan village centre	£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	**£0.7**	£0.2	£0.0	£0.0	£0.0	**£0.2**	**£0.9**
Out of Centre																					
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£1.2	£0.1	£0.0	£0.4	**£1.7**	£0.4	£0.2	£0.0	£0.0	**£0.6**	£0.7	£0.0	£0.1	£0.0	**£0.8**	£0.4	£0.0	£0.0	£0.0	**£0.5**	**£3.5**
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£3.4	£0.5	£0.6	£0.3	**£4.8**	£1.5	£0.1	£0.8	£0.1	**£2.4**	£0.8	£0.3	£0.1	£0.0	**£1.2**	£0.3	£0.0	£0.0	£0.0	**£0.3**	**£8.7**
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£8.7	£1.0	£4.0	£0.2	**£13.9**	£3.9	£0.4	£1.5	£0.2	**£6.0**	£1.8	£0.3	£0.2	£0.1	**£2.5**	£0.7	£0.1	£0.1	£0.0	**£1.0**	**£23.3**
Other	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£1.1	£0.1	£0.0	£0.0	**£1.2**	£0.5	£0.0	£0.1	£0.0	**£0.6**	**£1.8**
Zone 1 TOTAL	**£28.8**	**£2.5**	**£12.9**	**£2.1**	**£46.2**	**£12.5**	**£1.0**	**£5.7**	**£1.0**	**£20.2**	**£11.4**	**£1.0**	**£3.1**	**£0.2**	**£15.7**	**£5.0**	**£0.3**	**£1.2**	**£0.0**	**£6.6**	**£88.7**
Zone 2 (SA11 1 and SA11 2)																					
Neath Town Centre																					
Local shops, Neath Town Centre	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.3	£0.0	£0.0	**£0.3**	£0.0	£0.2	£0.0	£0.0	**£0.2**	**£0.6**
Morrisons, Angel Street, Neath, SA11 1RS	£0.5	£3.6	£0.0	£0.0	**£4.1**	£0.2	£1.6	£0.1	£0.0	**£1.9**	£0.2	£0.7	£0.1	£0.0	**£0.9**	£0.1	£0.3	£0.1	£0.0	**£0.4**	**£7.3**
M&S Green Street East Street 16, Neath SA11 1DH	£0.2	£0.1	£0.0	£0.0	**£0.3**	£0.0	£0.2	£0.0	£0.0	**£0.2**	£0.2	£0.7	£0.0	£0.0	**£0.9**	£0.1	£0.5	£0.0	£0.0	**£0.5**	**£1.9**
Briton Ferry Town Centre/Neath Road District Centre																					
Local shops, Briton Ferry Town Centre	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.4	£0.0	£0.0	**£0.4**	£0.0	£0.2	£0.0	£0.0	**£0.2**	**£0.6**
Out of Centre																					
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.4	£1.6	£0.3	£0.0	**£2.4**	£0.3	£0.8	£0.1	£0.0	**£1.2**	£0.1	£0.9	£0.0	£0.0	**£1.0**	£0.1	£0.4	£0.0	£0.0	**£0.4**	**£5.0**
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.2	£0.4	£0.0	£0.0	**£0.6**	£0.1	£0.0	£0.0	£0.0	**£0.1**	£0.2	£0.5	£0.0	£0.0	**£0.7**	£0.0	£0.3	£0.0	£0.0	**£0.3**	**£1.7**
Zone 2 TOTAL	**£1.4**	**£5.7**	**£0.3**	**£0.0**	£7.3	**£0.6**	**£2.5**	**£0.2**	**£0.0**	£3.3	**£0.7**	**£3.6**	**£0.1**	**£0.0**	£4.4	**£0.3**	**£1.8**	**£0.1**	**£0.0**	£2.1	£17.1
Zone 3 (SA12 9 and SA13 2)																					
Cwmavon, Local Centre																					
Co-Op Food, Cwmavon, Heol Jiwbill, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	£0.0	£0.0	£0.3	£0.0	**£0.3**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.2	£0.0	£1.2	£0.0	**£1.4**	£0.1	£0.0	£0.5	£0.0	**£0.6**	**£2.4**
Local shops, Cwmafan village centre	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.1	£0.0	**£0.1**	**£0.2**
Margam Local Centre																					
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.4	£0.0	**£0.4**	£0.0	£0.0	£0.2	£0.0	**£0.2**	**£0.6**
Local shops, Margam local centre	£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**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.0**
Zone 3 TOTAL	**£0.0**	**£0.0**	**£0.3**	**£0.0**	£0.3	**£0.0**	**£0.0**	**£0.1**	**£0.0**	£0.1	**£0.2**	**£0.0**	**£1.7**	**£0.0**	£1.8	**£0.1**	**£0.0**	**£0.8**	**£0.0**	£0.9	£3.1
Zone 4 (CF33 4 and CF33 6)																					
Pyle District Centre																					
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.0	£0.0	£0.3	£8.2	**£8.5**	£0.0	£0.0	£0.1	£3.7	**£3.8**	£0.0	£0.0	£0.0	£2.2	**£2.2**	£0.0	£0.0	£0.0	£0.8	**0.8**	**£15.4**
Local shops, Pyle	£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	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.1	**0.1**	**£0.5**
Kenfig Hill District Centre																					
Local shops, Kenfig Hill	£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	**£0.7**	£0.0	£0.0	£0.0	£0.3	**0.3**	**£1.0**
North Cornelly Local Service Centre																					
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£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	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.1	**0.1**	**£0.2**
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£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	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.1	**0.1**	**£0.5**
Local shops, North Cornelly	£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	£0.5	**£0.5**	£0.0	£0.0	£0.0	£0.2	**0.2**	**£0.8**
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.0	£0.0	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.6	**£0.6**	£0.0	£0.0	£0.0	£0.3	**0.3**	**£1.2**
Zone 4 TOTAL	**£0.0**	**£0.0**	**£0.3**	**£8.5**	£8.8	**£0.0**	**£0.0**	**£0.1**	**£3.7**	£3.9	**£0.0**	**£0.0**	**£0.0**	**£4.9**	£4.9	**£0.0**	**£0.0**	**£0.0**	**£2.0**	2.0	£19.6
BEYOND STUDY AREA																					
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.0	£0.0	£0.0	£0.7	**£0.7**	£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**	**£0.7**
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.2	£0.0	£0.2	£0.0	**£0.5**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£0.7**
Aldi, Neath Abbey Rd, Neath SA10 7BR	£0.0	£1.5	£0.7	£0.0	**£2.2**	£0.0	£0.4	£0.3	£0.0	**£0.7**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£2.9**
Asda, Coychurch Rd, Bridgend CF31 3AG	£0.0	£0.0	£0.0	£0.6	**£0.6**	£0.0	£0.0	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.1	**£0.1**	**£1.0**
Farmfoods, Pentre Felin Retail Park, Tondu, Bridgend, CF32 9GP	£0.0	£0.0	£0.0	£0.5	**£0.5**	£0.0	£0.0	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.7**
Iceland, Old Market Street, Neath, SA11 3NA	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.2	£0.0	£0.0	**£0.2**	£0.0	£0.5	£0.0	£0.0	**£0.5**	£0.0	£0.1	£0.0	£0.0	**£0.1**	**£0.9**
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£0.5	£0.1	£0.2	£0.0	**£0.9**	£0.1	£0.2	£0.1	£0.0	**£0.5**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£1.4**
Lidl, Maesteg Rd, Tondu, Off CF32 9DF	£0.0	£0.0	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.3**
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.4	£0.1	£0.0	**£0.5**	£0.0	£0.1	£0.0	£0.0	**£0.1**	**£0.6**
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.2	£0.7	£0.0	£0.0	**£0.8**	£0.0	£0.2	£0.0	£0.0	**£0.2**	**£1.0**
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	£1.3	£0.9	£0.7	£0.3	**£3.2**	£0.4	£0.3	£0.3	£0.1	**£1.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£4.5**
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.1	£0.0	£0.0	£0.1	**£0.3**	£0.0	£0.0	£0.1	£0.1	**£0.1**	**£0.5**
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£0.0	£4.5	£0.7	£0.0	**£5.2**	£0.0	£1.7	£0.1	£0.0	**£1.9**	£0.0	£0.1	£0.2	£0.0	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.1**	**£7.4**
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.0	£0.0	£0.0	£1.5	**£1.5**	£0.0	£0.0	£0.2	£0.6	**£0.7**	£0.0	£0.0	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.1	**£0.1**	**£2.4**
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.0	£0.0	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.7**
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.0	£0.8	£0.3	£0.9	**£2.1**	£0.1	£0.4	£0.0	£0.3	**£0.8**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£2.9**
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	£0.0	£0.0	£0.3	£0.5	**£0.9**	£0.0	£0.0	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.1	**£0.1**	**£1.1**
Local shops, Bridgend Town Centre	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.2**
Local shops, Maesteg Town Centre	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.0	£0.0	£0.1	£0.0	**£0.1**	**£0.2**
Local shops, Swansea City Centre	£0.1	£0.0	£0.0	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.2	£0.3	£0.0	£0.0	**£0.4**	£0.0	£0.1	£0.0	£0.0	**£0.1**	**£0.7**
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.0	£0.0	£0.7	£0.0	**£0.7**	£0.1	£0.0	£0.2	£0.0	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.9**
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	£0.4	£0.3	£0.0	£0.0	**£0.7**	£0.3	£0.1	£0.0	£0.0	**£0.4**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£1.1**
CKs Supermarket, Cimla Rd, Neath SA11 3UG	£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	**£0.7**	£0.0	£0.4	£0.0	£0.0	**£0.4**	**£1.0**
Home Bargains, Market St, Bridgend CF31 1LL	£0.0	£0.0	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.1**
Iceland, Brackla St, Bridgend CF31 1DD	£0.0	£0.0	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.5**
Local shops, Porthcawl	£0.0	£0.0	£0.0	£0.6	**£0.6**	£0.0	£0.0	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.9**
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.2	£0.0	£0.0	£0.0	**£0.2**	£0.1	£0.0	£0.0	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.3**
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.4	£0.0	£0.0	£0.0	**£0.4**	£0.2	£0.0	£0.0	£0.0	**£0.2**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.5**
Sainsbury's, Quay Parade, Swansea SA1 8JA	£0.8	£0.8	£0.1	£0.3	**£1.9**	£0.3	£0.3	£0.2	£0.1	**£0.9**	£0.2	£0.0	£0.0	£0.0	**£0.2**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£3.1**
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.3	£0.0	£0.1	£0.0	**£0.4**	£0.0	£0.0	£0.0	£0.0	**£0.1**	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.0	£0.0	£0.0	£0.0	**£0.0**	**£0.5**
Waitrose, Birds Ln, Cowbridge CF71 7YP	£0.0	£0.0	£0.3	£0.0	**£0.3**	£0.0	£0.0	£0.1	£0.0	**£0.1**	£0.2	£0.0	£0.0	£0.0	**£0.2**	£0.1	£0.0	£0.0	£0.0	**£0.1**	**£0.6**
Other	£0.0	£0.0	£0.0	£0.0	**£0.0**	£0.1	£0.1	£0.0	£0.0	**£0.2**	£0.3	£0.1	£0.0	£0.0	**£0.4**	£0.1	£0.0	£0.0	£0.0	**£0.2**	**£0.8**
Total	**£4.3**	**£9.0**	**£4.6**	**£6.8**	£24.6	**£1.8**	**£3.7**	**£1.7**	**£2.7**	£9.9	**£1.1**	**£2.7**	**£0.5**	**£0.3**	£4.6	**£0.5**	**£1.0**	**£0.2**	**£0.3**	£2.0	£41.1

Note.
Turnover calculated by applying market shares (Table 3) to available expenditure (Table 2d)
% split between main food and top up taken from hh survey Q12 answers

TABLE 6: EXISTING CONVENIENCE GOODS SHOPPING PATTERNS FOR PRIMARY CATCHMENT (£m) IN 2026

POSTCODE SECTOR	EXPENDITURE FLOW (%)	2026 (£M)
Zone 1 (retention)	83.9%	57.7
Zone 2	4.2%	2.9
Zone 3	0.3%	0.2
Zone 4	0.2%	0.1
Beyond Study Area	11.1%	7.6
TOTAL	100%	£68.8

Note: Shopping patterns taken from Table 3. Numbers may not add due to rounding.

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT

TABLE 7A: FOODSTORE BENCHMARK TURNOVER ANALYSIS (2026) + CAPACITY - ZONE 1

DESTINATION	Gross Floorspace (Sq.m)	Net Floorspace (Sq.m)	Net Convenience Floorspace (Sq.m)	2026 sales density	Benchmark Turnover 2026 (£m)	Survey Derived Turnover 2026 (£m)	Difference Benchmark and Survey Derived T/O 2026 (£m)	Difference Benchmark and Survey Derived T/O 2026 (minus OOC stores) (£m)	% over/ under trade (minus OOC stores)
Port Talbot Town Centre			**2,613**		**£28.15**	**£35.06**	**£6.91**	**£6.91**	**125**
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	1,460	876	175	£2,903	£0.51	£0.73	£0.22	£0.22	144
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	650	398	377	£7,440	£2.80	£1.97	-£0.83	-£0.83	70
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	1,060	636	191	£6,197	£1.18	£0.55	-£0.63	-£0.63	46
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA		2,400	1,620	£14,062	£22.78	£29.31	£6.52	£6.52	129
Local shops, Port Talbot Town Centre			250	£3,500	£0.88	£2.50	£1.63	£1.63	286
Commercial Road District Centre			**1,526**		**£10.91**	**£15.17**	**£4.26**	**£4.26**	**139**
Aldi, Commercial Road, Port Talbot, SA13 1LG		995	796	£11,009	£8.76	£14.24	£5.48	£5.48	163
Local shops, Taibach local centre			85	£2,500	£0.21	£0.00	-£0.21	-£0.21	0
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG			645	£3,000	£1.94	£0.93	-£1.01	-£1.01	48
Fairway Sandfields, Local Centre									
Costcutter, Fairway, Port Talbot, SA12 7HR			390	£4,613	£1.80	£0.24	-£1.55	-£1.55	14
Pentwyn Bagan Road, Baglan, Local Centre									
Local shops, Baglan village centre			25	£2,500	£0.06	£0.87	£0.81	£0.81	1393
Out of Centre									
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ		1,051	946	£7,440	£7.04	£3.53	-£3.51		
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ		1,225	980	£8,732	£8.56	£8.70	£0.15		
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ		3,577	2,633	£12,931	£34.04	£23.33	-£10.71		
Other			933		£1.79	£1.79	£0.00		
TOTAL					£92.35	£88.70	-£3.65	£10.42	

TABLE 7B: ZONE 1 - ADDITIONAL EXPENDITURE INFLOW CALCULATIONS (BEYOND HH SURVEY AREA)				
RETAIL CAPACITY / NEED ANALYSIS - WIDER INFLOW 2026				
Expenditure Inflow from rest of Council area - 5% of Turnover	£4.44			
Expenditure Inflow from outside Council area - 5% of Turnover	£4.44			
TOTAL + INFLOW	£97.57	£5.22	£15.64	

Notes:

a. Net retail floorspace figure for Aldi, Commercial Rd supplied by Aldi Stores Ltd (May 2023)

b. Net retail floorspace figure for others taken from Neath Port Talbot Retail Study (July 2013) by GVA and Retail Assessment by DPP for planning permission P2017/0516.

c. Proportion of net floorspace derived from typical company split between convenience and comparison floorspace as identified by Global data 2021. Tesco - 67.5% convenience, 32.5% comparison sales floorspace / Aldi - 80% convenience, 20% comparison / Morrisons 73.6% convenience floorspace, 26.4% comparison floorspace / Lidl - 78.6% convenience, 21.4% comparison / Iceland 94.1% convenience, 5.9% comparison

d. Sales densities for Aldi, B+M Bargains, Home Bargains, Costcutter, Iceland, Lidl and Morrisons derived from GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers and Mintel Retail Rankings

e. Turnovers projected forwards using Experian forecast sales densities from Figures 4a and 4b of Experian Retail Planner Briefing Note 20 (Feb 2023)

f. Survey derived turnover for 2026 sourced from Table 5

g. Expenditure Inflow from rest of Council area informed by Table 4 (Appendix C) of Neath Port Talbot Retail Study 2013. This highlighted main food/top-up expenditure from Zones 4, 6, 7 and 8 within Port Talbot. Modest assumption of 5% inflow adopted.

h. Expenditure Inflow from beyond Study Area assumed to be 5% as per Table 9c (Appendix C) of Neath Port Talbot Retail Study 2013.

2021 prices

TABLE 8: ANTICIPATED CONVENIENCE TRADE DRAW TO ALDI DEVELOPMENT

ZONE	TRADE DRAW (%)	2025 (£M)
Zone 1	80%	9.5
Zone 2	5%	0.6
Zone 3	15%	1.8
Zone 4	0%	0.0
Beyond Study Area	0%	0.0
TOTAL	100%	£11.84

Note: Trade draw informed by shopping patterns for primary catchment.

TABLE 9: CONVENIENCE GOODS TRADING DRAW ALLOCATION OF ALDI PROPOSALS (£m)

DESTINATION	Turnover from Zone 1 (Primary Catchment for Aldi proposals)	Convenience Turnover from wider study area 2026	Total Convenience Turnover (from HH survey) 2026	Zone 1		Zone 2		Zone 3		Zone 4	
	Total (£m)	Total (£m)	Total (£m)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)
Zone 1											
Port Talbot Town Centre											
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.11	£0.62	£0.73	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£1.08	£0.89	£1.97	£0.09	1.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.45	£0.10	£0.55	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£18.63	£10.68	£29.31	£1.89	20.00%	£0.12	20.00%	£0.36	20.00%	£0.00	0.00%
Local shops, Port Talbot Town Centre	£2.16	£0.34	£2.50	£0.09	1.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Commercial Road District Centre											
Aldi, Commercial Road, Port Talbot, SA13 1LG	£8.50	£5.74	£14.24	£1.99	21.00%	£0.12	20.00%	£0.36	20.00%	£0.00	0.00%
Local shops, Taibach local centre	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.22	£0.71	£0.93	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Fairway Sandfields, Local Centre											
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.24	£0.00	£0.24	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Pentwyn Bagan Road, Baglan, Local Centre											
Local shops, Baglan village centre	£0.87	£0.00	£0.87	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Out of Centre											
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£2.72	£0.81	£3.53	£0.57	6.00%	£0.01	2.00%	£0.00	0.00%	£0.00	0.00%
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£6.04	£2.67	£8.70	£1.61	17.00%	£0.12	20.00%	£0.28	16.00%	£0.00	0.00%
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£15.03	£8.30	£23.33	£1.61	17.00%	£0.12	20.00%	£0.28	16.00%	£0.00	0.00%
Other	£1.64	£0.15	£1.79	£0.09	1.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
SUB-TOTAL Zone 1	£57.70	£31.00	£88.70	£7.86	84.0%	£0.49	82.0%	£1.28	72.0%	£0.00	0.0%
Zone 2											
Neath Town Centre											
Local shops, Neath Town Centre	£0.00	£0.56	£0.56	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Morrisons, Angel Street, Neath, SA11 1RS	£0.97	£6.37	£7.35	£0.19	2.00%	£0.03	5.00%	£0.05	3.00%	£0.00	0.00%
M&S Green Street East Street 16, Neath SA11 1DH	£0.43	£1.46	£1.88	£0.09	1.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Briton Ferry Town Centre/Neath Road District Centre											
Local shops, Briton Ferry Town Centre	£0.00	£0.62	£0.62	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Out of Centre											
Lidl, Briton Ferry Road, Neath, SA11 1AS	£0.91	£4.11	£5.03	£0.66	7.00%	£0.03	5.00%	£0.18	10.00%	£0.00	0.00%
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	£0.56	£1.14	£1.71	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
SUB-TOTAL Zone 2	£2.87	£14.27	£17.14	£0.95	10.00%	£0.06	10.00%	£0.23	13.00%	£0.00	0.00%
Zone 3											
Cwmavon, Local Centre											
Co-Op Food, Cwmavon, Heol Jiwbill, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	£0.22	£2.19	£2.41	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Cwmafan village centre	£0.00	£0.16	£0.16	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Margam Local Centre											
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.00	£0.56	£0.56	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Margam local centre	£0.00	£0.00	£0.00	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
SUB-TOTAL Zone 3	£0.22	£2.92	£3.14	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Zone 4											
Pyle District Centre											
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.11	£15.29	£15.40	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Pyle	£0.00	£0.49	£0.49	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Kenfig Hill District Centre											
Local shops, Kenfig Hill	£0.00	£0.98	£0.98	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
North Cornelly Local Service Centre											
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£0.00	£0.24	£0.24	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.00	£0.50	£0.50	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, North Cornelly	£0.00	£0.78	£0.78	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.00	£1.21	£1.21	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
SUB-TOTAL Zone 4	£0.11	£19.50	£19.60	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
BEYOND STUDY AREA											
Aldi, Ind. Est, Brackla St, Cheapside, Bridgend CF31 1BZ	£0.00	£0.69	£0.69	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Aldi, Llynfi Walk, Llynfi Road, Maesteg, CF34 9DS	£0.30	£0.36	£0.65	£0.19	2.00%	£0.00	0.00%	£0.09	5.00%	£0.00	0.00%
Aldi, Neath Abbey Rd, Neath SA10 7BR	£0.00	£2.92	£2.92	£0.00	0.00%	£0.02	4.00%	£0.09	5.00%	£0.00	0.00%
Asda, Coychurch Rd, Bridgend CF31 3AG	£0.00	£1.02	£1.02	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Farmfoods, Pentre Felin Retail Park, Tondu, Bridgend, CF32 9GP	£0.00	£0.70	£0.70	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Iceland, Old Market Street, Neath, SA11 3NA	£0.00	£0.86	£0.86	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Lidl, Cadoxton Rd, Cadoxton, Neath SA10 7AY	£0.68	£0.68	£1.36	£0.19	2.00%	£0.02	3.00%	£0.09	5.00%	£0.00	0.00%
Lidl, Maesteg Rd, Tondu, Off CF32 9DF	£0.00	£0.32	£0.32	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Express, Cimla Road, Neath, SA11 3UG	£0.00	£0.61	£0.61	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Express, Neath Abbey Road, Neath, SA10 7FE	£0.17	£0.87	£1.04	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Extra, Nantyffin North, Swansea Enterprise Park, Swansea, SA7 9RF	£1.83	£2.63	£4.47	£0.09	1.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Superstore, Castle Street, Maesteg, CF34 9UY	£0.13	£0.38	£0.51	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Superstore, Neath Abbey Road, Neath, SA10 7FE	£0.00	£7.44	£7.44	£0.00	0.00%	£0.01	1.00%	£0.00	0.00%	£0.00	0.00%
Tesco Extra, Cowbridge Road, Bridgend CF31 3SQ	£0.00	£2.41	£2.41	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Superstore, Brewery Lane, Bridgend CF31 4AP	£0.04	£0.63	£0.67	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Sainsbury's, Derwen, Bridgend CF32 9ST	£0.13	£2.79	£2.91	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Lidl, Bridgend Retail Park, Llys Tre Dwr, Bridgend CF31 3LG	£0.00	£1.10	£1.10	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Bridgend Town Centre	£0.00	£0.17	£0.17	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Maesteg Town Centre	£0.00	£0.19	£0.19	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Swansea City Centre	£0.31	£0.34	£0.65	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Aldi, Samlet Rd, Llansamlet, Swansea SA7 9AF	£0.11	£0.83	£0.94	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Asda, Upper Fforest Way, Llansamlet, Swansea SA6 8PS	£0.66	£0.40	£1.07	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
CKs Supermarket, Cimla Rd, Neath SA11 3UG	£0.00	£1.03	£1.03	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Co-Op Food, High St, Glynneath, Port Talbot SA11 5AL	£0.00	£0.06	£0.06	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Home Bargains, Market St, Bridgend CF31 1LL	£0.00	£0.13	£0.13	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Iceland, Brackla St, Bridgend CF31 1DD	£0.00	£0.48	£0.48	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Lidl, Ffordd Parc Ynysderw, Pontardawe, Swansea SA8 4AG	£0.00	£0.04	£0.04	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Local shops, Porthcawl	£0.00	£0.92	£0.92	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
M&S Foodhall, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.34	£0.00	£0.34	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
M&S, Copthorne Way, Culverhouse Cross, Cardiff CF5 6YZ	£0.52	£0.00	£0.52	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Sainsbury's, Quay Parade, Swansea SA1 8JA	£1.35	£1.79	£3.14	£0.09	1.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Tesco Extra, Pontardulais Rd, Cadle, Fforest-fach, Swansea SA5 4BA	£0.31	£0.16	£0.47	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Waitrose, Birds Ln, Cowbridge CF71 7YP	£0.22	£0.42	£0.64	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
Other	£0.52	£0.24	£0.76	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%	£0.00	0.00%
TOTAL	£7.62	£33.53	£41.15	£0.57	6.0%	£0.05	8.0%	£0.27	15.0%	£0.00	0.0%
OVERALL TOTAL	£68.52	£101.21	£169.73	£9.38	100.00%	£0.59	100.00%	£1.78	100.00%	£0.00	0.00%

Notes:

a. Trade allocation of the proposal based on the primary catchment area, existing shopping patterns as informed by the Tables 3-5 and geographic location of retail provision.

b. Turnover of Aldi store from Table 1 Aldi turnover.

2021 Prices

LAND NORTH OF AFAN WAY, ABERAVON, PORT TALBOT
RETAIL IMPACT ASSESSMENT

TABLE 10: CONVENIENCE GOODS SOLUS TRADING IMPACT 2026 (£m)

DESTINATION	Turnover from Zone 1 (Primary Catchment for Aldi proposals)	Convenience Turnover from wider Study Area 2026	Total Convenience Turnover (from Study Area) 2026	SOLUS IMPACT			
				Proposed Aldi store, Afan Way			Post-Solus Impact Total Turnover (from Study Area) 2026 (£m)
	Total (£m)	Total (£m)	Total (£m)	(% Diversion)	(£m Diversion)	(% Trading Impact)	
Zone 1							
Port Talbot Town Centre							
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.11	£0.62	£0.73	0.0%	£0.00	0.0%	£0.73
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£1.08	£0.89	£1.97	0.8%	£0.09	4.8%	£1.87
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.45	£0.10	£0.55	0.0%	£0.00	0.0%	£0.55
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£18.63	£10.68	£29.31	20.0%	£2.37	8.1%	£26.94
Local shops, Port Talbot Town Centre	£2.16	£0.34	£2.50	0.8%	£0.09	3.8%	£2.41
TOTAL	**£22.43**	**£12.63**	**£35.06**	**21.6%**	**£2.6**	**7.3%**	**£32.50**
Commercial Road District Centre							
Aldi, Commercial Road, Port Talbot, SA13 1LG	£8.50	£5.74	£14.24	20.8%	£2.46	17.3%	£11.78
Local shops, Taibach local centre	£0.00	£0.00	£0.00	0.0%	£0.00	0.0%	£0.00
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.22	£0.71	£0.93	0.0%	£0.00	0.0%	£0.93
TOTAL	**£8.73**	**£6.44**	**£15.17**	**20.8%**	**£2.5**	**16.2%**	**£12.71**
Fairway Sandfields, Local Centre							
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.24	£0.00	£0.24	0.0%	£0.00	0.0%	£0.24
Pentwyn Bagan Road, Baglan, Local Centre							
Local shops, Baglan village centre	£0.87	£0.00	£0.87	0.0%	£0.00	0.0%	£0.87
Out of Centre							
Iceland (The Food Warehouse), Christchurch Rd, Port Talbot SA12 7BZ	£2.72	£0.81	£3.53	4.9%	£0.58	16.4%	£2.95
Lidl, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£6.04	£2.67	£8.70	17.0%	£2.01	23.1%	£6.69
Morrisons, Christchurch Road, Baglan Industrial Park, Port Talbot, SA12 7BZ	£15.03	£8.30	£23.33	17.0%	£2.01	8.6%	£21.32
Other	£1.64	£0.15	£1.79	0.8%	£0.09	5.3%	£1.69
SUB-TOTAL ZONE 1	**£57.7**	**£31.0**	**£88.7**	**82.1%**	**£9.72**	**11.0%**	**£79.0**
Zone 2							
Neath Town Centre							
Local shops, Neath Town Centre	£0.00	£0.56	£0.56	0.0%	£0.00	0.0%	£0.56
Morrisons, Angel Street, Neath, SA11 1RS	£0.97	£6.37	£7.35	2.3%	£0.27	3.7%	£7.07
M&S Green Street East Street 16, Neath SA11 1DH	£0.43	£1.46	£1.88	0.8%	£0.09	5.0%	£1.79
TOTAL	**1.40**	**8.39**	**£9.79**	**3.1%**	**£0.37**	**3.7%**	**£9.42**
Briton Ferry Town Centre/Neath Road District Centre							
Local shops, Briton Ferry Town Centre	£0.00	£0.62	£0.62	0.0%	£0.00	0.0%	£0.62
Out of Centre							
Lidl, Briton Ferry Road, Neath, SA11 1AS	0.91	4.11	5.03	7.4%	£0.87	17.3%	£4.16
Tesco Express, Neath Road, Briton Ferry, Port Talbot, Neath SA11 2AX	0.56	1.14	1.71	0.0%	£0.00	0.0%	£1.71
SUB-TOTAL ZONE 2	**£2.87**	**£14.27**	**£17.14**	**10.5%**	**£1.24**	**-**	**£15.90**
Zone 3							
Cwmavon, Local Centre							
Co-Op Food, Cwmavon, Heol Jiwbill, Heol Jiwbili, Cwmavon, Port Talbot, SA12 9NR	£0.22	£2.19	£2.41	0.0%	£0.00	0.0%	£2.41
Local shops, Cwmafan village centre	£0.00	£0.16	£0.16	0.0%	£0.00	0.0%	£0.16
TOTAL	**£0.22**	**2.35**	**2.58**	**0.0%**	**£0.00**	**0.0%**	**£2.58**
Margam Local Centre							
Co-Op Food, Tollgate Road, Margam, Port Talbot, SA13 2DD	£0.00	£0.56	£0.56	0.0%	£0.00	0.0%	£0.56
Local shops, Margam local centre	£0.00	£0.00	£0.00	0.0%	£0.00	0.0%	£0.00
TOTAL	**£0.00**	**£0.56**	**£0.56**	**0.0%**	**£0.00**	**0.0%**	**£0.56**
SUB-TOTAL ZONE 3	**£0.22**	**£2.92**	**£3.14**	**0.0%**	**£0.00**	**0.0%**	**£3.14**
Zone 4							
Pyle District Centre							
Asda, Pyle Industrial Estate, Pyle Cross, Pyle, Bridgend CF33 6BU	£0.11	£15.29	£15.40	0.0%	£0.00	0.0%	£15.40
Local shops, Pyle	£0.00	£0.49	£0.49	0.0%	£0.00	0.0%	£0.49
TOTAL	**£0.11**	**15.79**	**15.90**	**0.0%**	**£0.00**	**0.0%**	**£15.90**
Kenfig Hill District Centre							
Local shops, Kenfig Hill	£0.00	£0.98	£0.98	0.0%	£0.00	0.00%	£0.00
North Cornelly Local Service Centre							
Costcutter, Heol Las, North Cornelly, Bridgend, CF33 4AS	£0.00	£0.24	£0.24	0.0%	£0.00	0.0%	£0.00
Filco, Hall Dr, North Cornelly, Bridgend CF33 4LA	£0.00	£0.50	£0.50	0.0%	£0.00	0.0%	£0.00
Local shops, North Cornelly	£0.00	£0.78	£0.78	0.0%	£0.00	0.0%	£0.00
Tesco Express, Heol Fach, North Cornelly, Bridgend CF33 4LN	£0.00	£1.21	£1.21	0.0%	£0.00	0.0%	£0.00
TOTAL	**£0.00**	**£2.73**	**£2.73**	**0.0%**	**£0.00**	**0.0%**	**£2.73**
SUB-TOTAL ZONE 4	**£0.11**	**£19.50**	**£19.60**	**0.0%**	**£0.00**	**0.0%**	**£19.60**
BEYOND STUDY AREA							
SUB-TOTAL BEYOND STUDY AREA	**£7.62**	**£33.53**	**£41.15**	**7.5%**	**£0.88**		**£40.27**
TOTAL	**£68.52**	**£101.21**	**£169.73**	**100.0%**	**£11.84**	**-**	

Notes:

a. Survey derived turnovers of all existing destinations for 2026 sourced directly from TABLE 5: CONVENIENCE GOODS SHOPPING PATTERNS (£m) IN 2026 Column Y.

b. Turnover of proposed Aldi foodstore taken from Table 1 and allows for changes in turnover efficiencies based on Figures 4a and 4b (Page 15) of Experian Retail Planner Briefing Note 20 (February 2023).

c. Impact based on the proportional change in turnover expressed as a percentage.

d. Percentage impact tested upon the total turnovers of centres and other retail destinations (i.e. inclusive of inflow from the wider Retail Study area).

e. Anticipated trade diversion of proposal based on existing shopping patterns and geographic location of existing and proposed provision (as identified by the household telephone shopper survey data)

f. 'Post-Impact Total Turnover (2026)' = 'Pre-Impact Total Turnover (2026)' minus '£m Diversion (2026)'

2021 Prices

TABLE 11: PRE-DEVELOPMENT + POST-DEVELOPMENT CENTRE PERFORMANCE

DESTINATION	Total Convenience Turnover (from Study Area) 2026 Pre-Development	Post-Solus Impact Total Turnover (from Study Area)	Pre-Development Overtrading / Undertrading	Post-Development Overtrading / Undertrading
	Total (£m)	Total (£m)	%	%
Zone 1				
Port Talbot Town Centre				
B&M, Aberafan Shopping Centre, Port Talbot SA13 1PB	£0.73	£0.73	144%	144%
Iceland, Aberafan Centre, Port Talbot, SA13 1PB	£1.97	£1.87	70%	67%
Home Bargains, Aberafan Centre, Heilbronn Way, Port Talbot SA13 1NG	£0.55	£0.55	46%	46%
Tesco Superstore, Prior Street, Port Talbot, SA13 1YA	£29.31	£26.94	129%	118%
Local shops, Port Talbot Town Centre	£2.50	£2.41	286%	275%
TOTAL	£35.06	£32.50	125%	115%
Commercial Road District Centre				
Aldi, Commercial Road, Port Talbot, SA13 1LG	£14.24	£11.78	163%	134%
Local shops, Taibach local centre	£0.00	£0.00	0%	0%
Filco, 2-16 Commercial Rd, Port Talbot SA13 1LG	£0.93	£0.93	48%	48%
TOTAL	£15.17	£12.71	139%	116%
Fairway Sandfields, Local Centre				
Costcutter, Fairway, Port Talbot, SA12 7HR	£0.24	£0.24	14%	14%
Pentwyn Bagan Road, Baglan, Local Centre				
Local shops, Baglan village centre	£0.87	£0.87	1393%	1393%

Notes:

a. Survey derived turnovers of all existing destinations for 2026 sourced directly from TABLE 5: CONVENIENCE GOODS SHOPPING PATTERNS (£m) IN 2026 Column Y.

b. Post Solus Impact taken from TABLE 10 - CONVENIENCE GOODS SOLUS TRADING IMPACT (2026)

c. Pre-development % figure taken from TABLE 7A: FOODSTORE BENCHMARK TURNOVER ANALYSIS (2026) + CAPACITY - ZONE 1

d. Post-development figure calculated by comparing Post-Solus Impact Total Turnover (£m) with TABLE 7A benchmark turnovers to estimate over-trading/under-trading

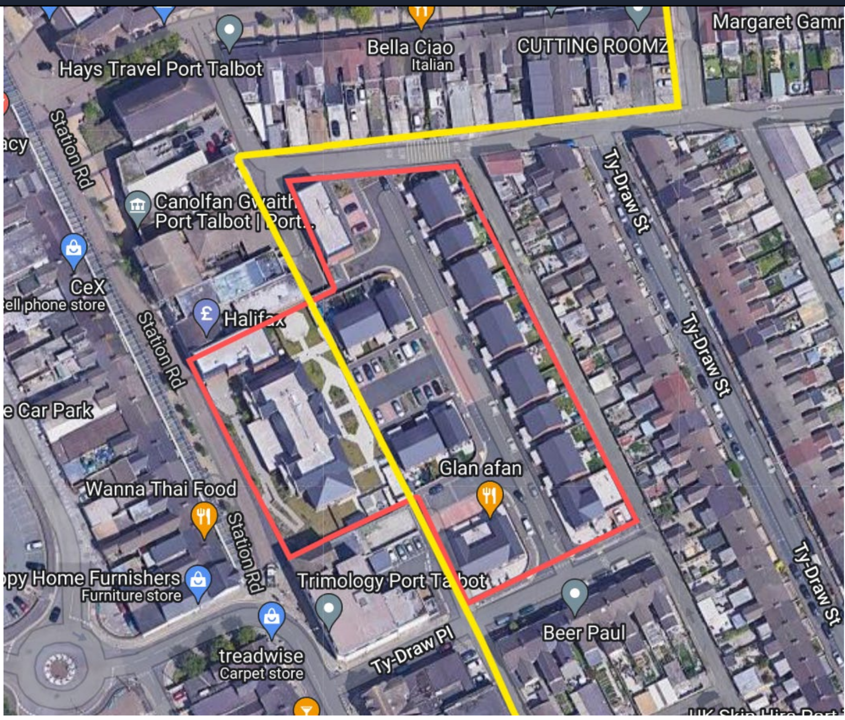
2021 Prices

Appendix VI

Sequential Site Proformas

AVISON YOUNG

Appendix VI - Sequential Assessment – Detailed Proformas

Site 1 – R1/2 Glanafan Comprehensive School, Port Talbot	
Satellite Image	

Site Photos Existing site showing new residential development	 
Site Size	c. 0.8 hectares
Existing Uses	The site is currently occupied by recently completed housing, with the former school being to the east of the site having been converted to flats at upper level

	and commercial uses on the ground floor.
Neighbouring Uses	Neighbouring uses are mixed, with residential properties generally lying to the northeast and southeast, with town centre commercial properties to the southwest, west and northwest.
Relationship with Nearest Centre	The allocation of the site overlaps the town centre boundary for Port Talbot, and it is therefore an '*in centre*' opportunity in planning terms.
Development Plan Allocation	The full site is identified as a Coastal Corridor Regeneration Scheme under Policy CCRS1/2 Glanafan Comprehensive School, Port Talbot within the LDP. It is also allocated for retail use under policy R1. The allocation identifies the site is a mixed residential and retail opportunity with references H1/16 and R1/2 respectively.
Planning Permissions / Current Development Proposals	Planning permission was granted for a mixed-use development in March 2017 under reference P2016/0657 for the demolition of the former school buildings, whilst retaining the frontage to Station Road, and construction of a total of 2 commercial units, 29 flats and 20 houses. The commercial units were a size of 195 sq.m and 55 sq.m. Following the granting of this planning permission, a number of further submissions were made to discharge conditions, and to make some minor amendments to the approved scheme. The works have now been fully delivered on site, with no vacant land available.
Suitability	The site itself is too small to accommodate the development proposals. In addition, the development which has been delivered includes commercial units which are too small for either element of the proposed scheme, even if a significant degree of flexibility was applied. There is also an inability to deliver a further unit/ units on the site of sufficient size to accommodate both or even either part of the proposals. In regards a coffee shop, this could also not be delivered on the site due to the pedestrianised nature of the street lying to the southeast of the commercial units, which would prohibit the location of a drive thru lane. This position has also been explored in a number of appeal cases recently, concluding that traditional town centre sites could not accommodate this type of development. Finally, the site does not offer suitable accessibility, car parking or prominence to accommodate the retail element of the proposals. On the basis of these matters, the site can be discounted as '*unsuitable*' to accommodate either part of the proposed development.
Availability	The site has now been fully developed for an alternative use and both commercial units are currently occupied. It is therefore no longer '*available*' and can be discounted on this basis.
Conclusions	In view of the small size of the site and recently completed and fully occupied development here, the site cannot be considered either '*suitable*' or '*available*'. It subsequently cannot be considered a sequentially preferable alternative to the

	application site and is dismissed on this basis.

Site 2 – R1/3 Harbourside

Satellite Image

Site Photo Existing site – view of area allocated for retail development looking north	 
Site Size	c. 47 hectares
Existing Uses	The whole site is occupied by a variety of users and uses. This includes various industrial operators, office space, car parking.
Neighbouring Uses	The site is well contained, with the River Afan forming the northern and western boundary. The southern boundary is defined by an area of former dockland (known as "The Docks"), accessed from the River Afan to the southwest of the

	site. The east of the site is defined by a rail line, with the A48 and town centre beyond. There are only very limited connections between the town centre and the site, with a number of barriers in between.
Relationship with Nearest Centre	From an aerial perspective, the site might be seen as edge of centre given its proximity to Port Talbot Town Centre, however there is very limited pedestrian access between the site and the town centre. This limited connection is actually identified in the supporting text to the allocation contained within the LDP. PPW is also clear that any edge of centre or out of centre site should be accessible by a range of transport modes, including public transport. We note that there are currently no bus stops located within the site, and as such the site does not meet this criterion. The adopted Plan sets out an masterplan indicating the proposed location for uses across the site. This indicates retail elements should be located at the northern corner of the site, however it is noted that there are industrial buildings present which are occupied by a variety of existing parties. These have been located here I the long-term. The nearest vacant site is located more than 300m distant from the town centre. As a result of this, we consider that the site does not represent an edge of centre opportunity and is therefore no more sequentially preferable to the application site. This is based on the distances outlined in TAN4 identifying an edge of centre site being "*more than 200 to 300 metres from the edge of the centre. Factors such as the size of the retail and commercial centre, local topography and presence of physical barriers to access may influence any assessment."* In the context of this site, a railway line and dual carriageway lie between the location and the town centre, with limited pedestrian connectivity available. Both of these connections involve a complex route, requiring the use of underpasses or bridges to walk from the town centre. Given the principle of '*edge of centre*' is a site that is easy to access on foot from the town centre, it is evident that this site does not meet those criteria. For these reasons we consider that the site is located '*<u>out of centre</u>*' in retail planning terms.
Development Plan Allocation	The full site is allocated under Policy SR12 Harborside Strategic Regeneration Area. It is also allocated for retail use under policy R1. As part of this allocation, 3.37ha of the site is identified with reference R1/3 for the use of A1 Bulky Comparison Goods. Supporting text makes it clear that Supplementary Guidance will be produced to provide more detail as to the requirements to deliver the allocation and timings. It also highlights significant flood risks across the majority of the site. An indicative masterplan is also produced which identifies that bulky comparison retail should be located at the north east corner of the site, as shown by the green highlighted area on the extract of the LDP below.

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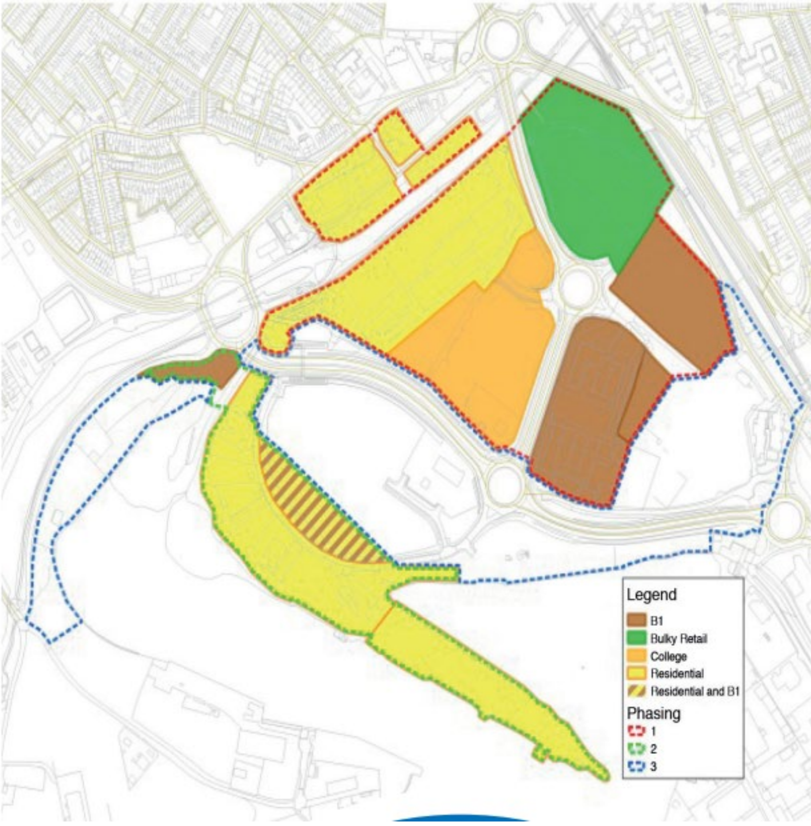
Map 4.2 Harbourside Masterplan



Policy R1 Retail Allocations of the LDP is also relevant confirming that part of the site is allocated for retail development. Supporting text to the policy explicitly states: "*Land within the Harbourside Strategic Regeneration Area is allocated for bulky comparison goods retail in line with the Supplementary Planning Guidance. The retail development will be expected to be as near as possible to the town centre. At present there is poor connectivity to the town centre and as part of any development proposal the linkages will have to be improved and measures put in place to overcome the physical barriers (including the roads and railway lines) in order to ensure integration and linked trips to the town centre.*" It is therefore clear that the Council recognise the poor linkages between the site and the Town Centre and that this needs to be improved as part of any development.

Whilst the LDP makes reference to Supplementary Planning Guidance, the Council have confirmed that at this time, there is no adopted SPG in place.

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Planning Permissions / Current Development Proposals

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The site is subject to a significant number of previous planning applications. As such, we have reviewed planning applications identified by the planning portal submitted within the last 5 years (as at the time of writing). There are also a number of plots which are occupied by existing uses, which are also included in the list below. Finally, a map identifying the various sites is included below for clarity.

1. Occupied via a variety of industrial uses. (3.3ha)
2. Part occupied by AWD Group and part vacant. (3.7 ha)
3. P2022/1035 - EIA screening request for a new college and associated works. No formal planning application has been submitted to date. (3.0 ha)
4. Occupied by Network Rail. (1.2 ha)

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5. P2020/0294 – Planning application relating to new access road, flood mitigation works and land contamination remediation to accommodate future commercial development. The application was approved in October 2020, and a number of applications to discharge conditions have been submitted and approved. The access road has been constructed (3.6 ha)
6. Occupied by new office buildings, occupied by a variety of parties. (1.1 ha)
7. Occupied by Port Talbot Justice Centre. (0.9ha)
8. Occupied by variety of industrial uses including LBS Builders Merchant and Neath Advance Render Cleaning Services. (2.0 ha)
9. P2014/0995, P2020/0174 – planning permission originally granted in January 2015 for erection of 3x Business Units. Implementation of the planning permission has been extended by a S73 application, which was granted in April 2020. (1.36 ha)
10. Port Talbot railway station and car park. (0.8 ha)
11. Occupied office buildings. (0.5 ha)
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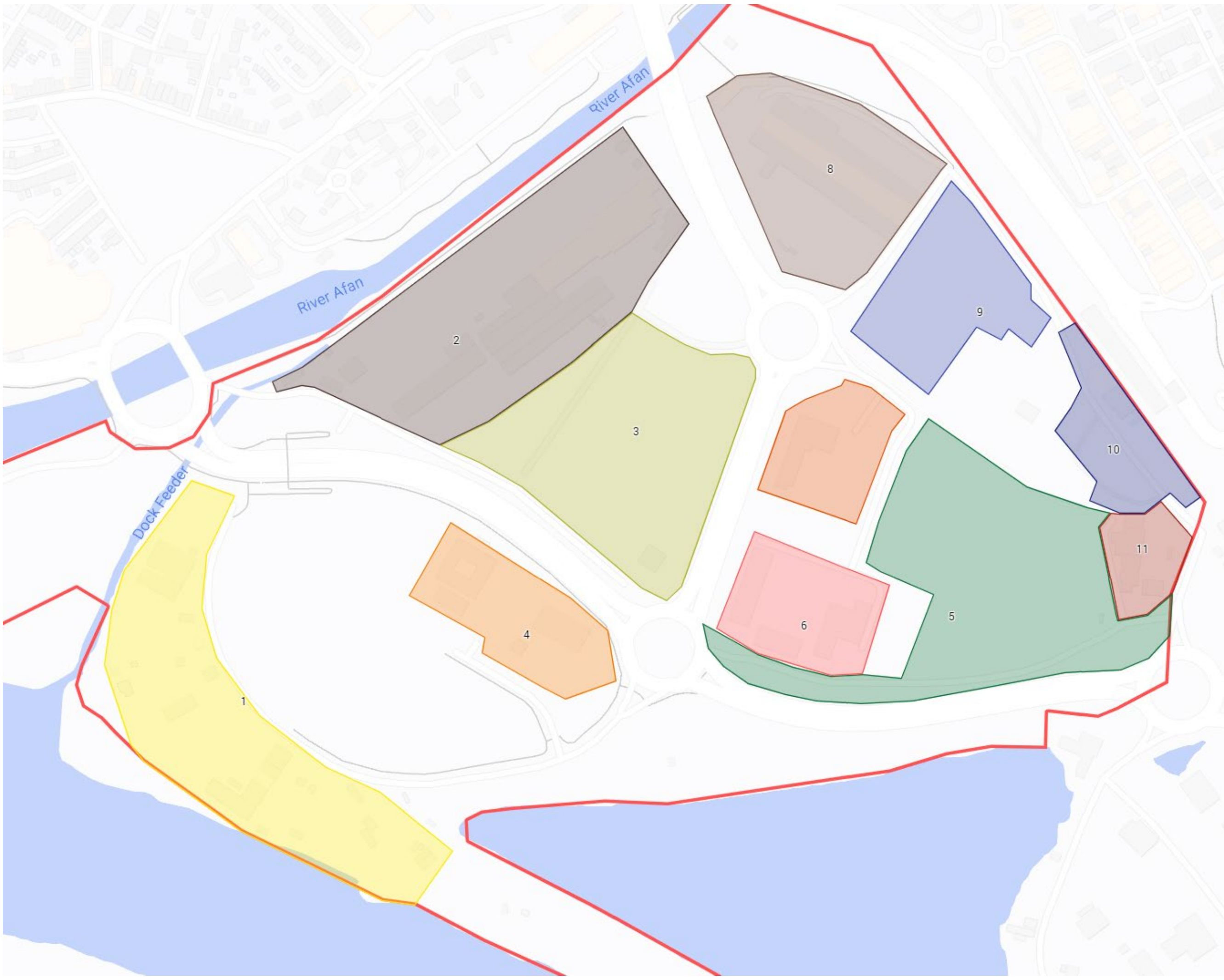

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<tr><td>Suitability</td><td>
Whilst part of the site is identified as suitable for retail use, this is a bulky comparison retail use only. As these proposals are for convenience retail and a coffee shop/ drive thru, they would be contrary to the allocation of the site.

We consider that due to the poor connections which the site has with the town
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	center, and that the walking distance to any available plot within the site to the town centre is over 300m, that it is also an *'out of centre'* location in retail planning terms. It also does not include any public transport connectivity, and therefore does not comply with the requirements of PPW as an 'edge of centre' site. As such, it is not a sequentially preferable location when compared to the application site. It is also worth noting that a number of the previous/existing uses on site involve operations which have led to significant land contamination across the site. This may limit the available land suitable for development and could impact on the viability of any scheme. For the reasons set out above, the site is not considered to be suitable for the development that is proposed by this application.
Availability	It is a clear there are a number of available plots across the site however these are some distance from the town centre and 'out of centre'. Given the current uses on the site closest to the town centre and that the SPG has not yet been adopted, the overall timescales for delivery of any uses on the land is in question. This is very likely to be a number of years away. We therefore consider that the site is unavailable.
Conclusions	In conclusion, we do not believe that the site meets the requirements of TAN4 as an accessible 'edge of centre' site. Furthermore, in view of the allocation of the site being for a form of retail which is different to that of these proposals, the site cannot be considered '*suitable'*. The availability of the site in the next 2-3 years is also unlikely meaning the site is unavailable and unsuitable. It subsequently cannot be considered a sequentially preferable alternative to the application site and is dismissed on this basis.

<table>
<tr><th colspan="2">Site 3 – Land at Baglan Primary School</th></tr>
<tr><td>Satellite Image</td><td>
</td></tr>
<tr><td>Site Photo

Existing site looking north east from Lodge Drive</td><td>
</td></tr>
<tr><td>Site Size</td><td>c. 1.23 ha</td></tr>
<tr><td>Existing Uses</td><td>Currently open space associated with Baglan Primary School which lies to the immediate northeast.</td></tr>
</table>

Neighbouring Uses	Neighbouring uses are mainly residential in nature, with this type of property lying to the north, south and west. To the northeast lies the buildings of Baglan Primary School and to the east, Baglan Education & Training Centre.
Relationship with Nearest Centre	The site is located a walk of approximately 250m to the nearest allocated Local Centre of Fairwood Drive/Lodge Drive, Baglan. As such, the site represents an '*edge of centre'* opportunity in retail policy terms.
Development Plan Allocation	The proposals map of the LDP does not include any policy designation or allocation over the site. As such it forms 'white land' and is subject to general policies from the LDP. Given the site forms open space, Policy OS2 Protection of Existing Open Space is relevant to consider. The policy prohibits the loss of open space unless three criteria can all be met as follows: 1. *The open space is no longer needed;* ***and*** 2. *There is no shortfall of provision of that category of open space in the ward, before or as a result of the development;* ***and*** 3. *The site would not be suitable to provide an alternative type of open space for which there is a shortfall.* ***Or****: It can be demonstrated that equivalent or enhanced facilities can be provided on a suitable and accessible replacement site which would serve the local community equally well.*
Planning Permissions / Current Development Proposals	The Neath Port Talbot Council planning portal does not identify any planning proposals for the site.
Suitability	Whilst the site is suitable in size, development of either part of the proposals on the site would be contrary to policy, as it would result in the loss of open space which is controlled by Policy OS2 of the LDP. In order to satisfy planning policy, any loss of open space requires an alternative provision to be met on an appropriate location in the nearby area. This clearly cannot be achieved in this case. It should also be noted that the site lies at the very north of the proposed catchment of these proposals. As a result, any development at this location would serve a different catchment to that proposed by the application. Therefore, the site is '*unsuitable'* for the proposed development and can be dismissed on this basis.
Availability	The site is not being marketed for development, but due to its current use as open space, it is clear it is unavailable.
Conclusions	Due to the policy protection which the site has as open space, and an inability for the proposals to fully address the policy, the site can be discounted as '*unsuitable*' for the development proposed. It is also *'unavailable'* due to its existing use and can be dismissed on this basis.

	Given the above, the site can therefore be discounted as a sequentially preferable opportunity.

Contact Details

Enquiries
Owain Griffiths
02920 248 920
owain.griffithsl@avisonyoung.com

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Avisonyoung.co.uk