

Public Realm Survey

Impact of Covid-19 measures in town centres report

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carmarthenshire.gov.wales

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CARMARTHENSHIRE COUNTY COUNCIL

PUBLIC REALM CONSULTATION SURVEY

1) Introduction

A mixed-methods approach was utilised to uncover business and citizens views of the current measures placed in Llanelli, Carmarthen and Ammanford town centres due to Covid-19. Citizens were asked to comment on the impact that these measures have had on public safety, traffic, and the feel and look of towns whilst businesses were also asked to comment on the impact of these measures on their trade. The survey took place during the period from 16th November 2020 to 4th January 2021.

This report:

1. Outlines **how businesses and members of the public were contacted and recruited to take part in the survey;**
2. Describes the overall **key points** found in the analysis from the **business survey;**
3. Describes the overall **key points** found in the analysis from the **public survey;**

2) Outline of methods and recruitment

Online survey

Members of the public and businesses were directed to an online survey which was hosted on the Carmarthenshire County Council website. A number of methods of promoting the survey were utilised:

- Latest news updates
- E-newsletter sent to businesses
- Social media (i.e. Twitter and Facebook)
- Phone calls to businesses
- Officers promoting survey to local businesses

Businesses and members of the public were also notified that they could respond through telephone call or email.

A total of 268 responses were received from members of the public whilst 52 businesses completed the questionnaire. A list of businesses can be seen in Appendix A.

Calculating Average Index Score (AIS)¹

Sometimes known as a 'weighted average', the AIS is a way of distilling the 'strength of opinion' down into one number. Useful for questions with options to 'strongly agree', 'disagree', etc. Values range from 2 (*everyone* strongly agrees) to minus 2 (*everyone* strongly disagrees).

Example

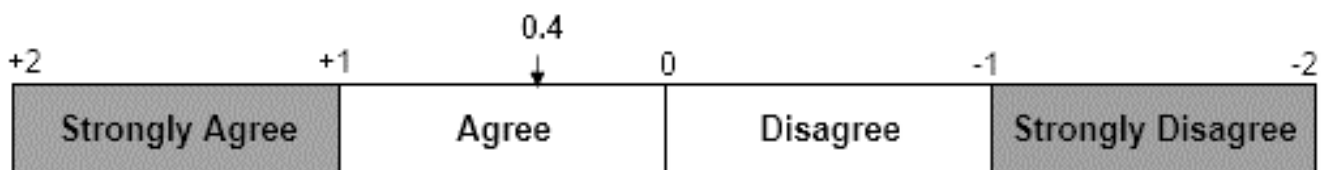
10 people are asked whether they 'strongly agree', 'agree', 'have no opinion', 'disagree' or 'strongly disagree' that Wales will win the six nations.

Results...

3 strongly agree (each response worth 2, so=6); 3 agree (each response worth 1, so=3); 1 no opinion (=0); 1 disagree (each response worth -1, so= -1); 2 strongly disagree (each response worth -2, so=-4)

The AIS is calculated by adding all the numbers in bold: So, $6+3+0-1-4=4$;

Then dividing by the number of responses (10 in this case). The average index score is: $4 \div 10 = 0.4$ (as depicted below)

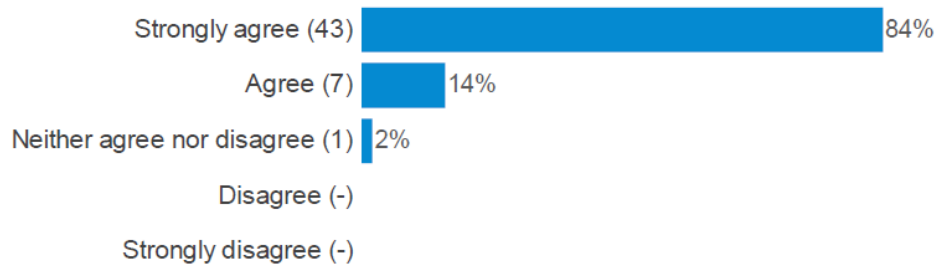


¹ Explanation of the Average Index Score calculation and example.

3) Business survey: Summary of key overall results

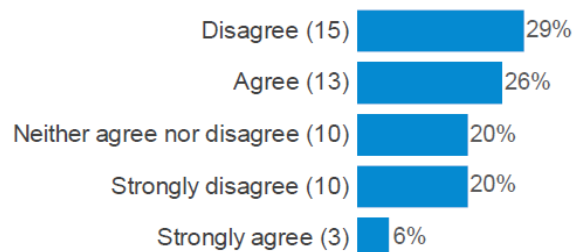
The following section of this report provides a summary of the key findings of the business survey. Each question is displayed in turn.

- (i) Covid-19 has had a general negative impact on trade since March 2020 with a general downturn in economic performance.



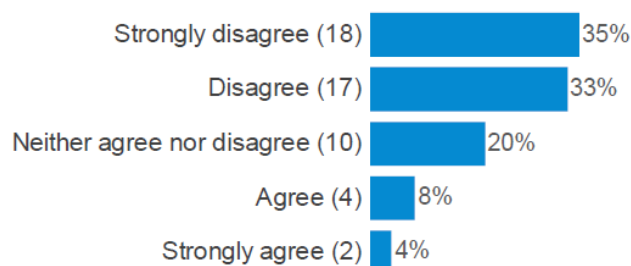
Overall, 98% of businesses agree or strongly agree that Covid-19 has had a general negative impact on trade since March 2020 (initial lockdown) with a general downturn in economic performance. 0% of businesses disagreed with this statement.

- (ii) Week on week trade has improved since restrictions were lifted on 2 July 2020.



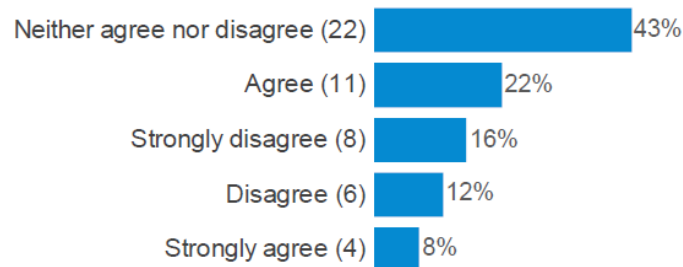
49% of businesses disagreed or strongly disagreed that week on week trade has improved following the lifting of restrictions in July. Conversely, 32% of businesses indicated that there has been an improvement following the lifting of restrictions.

- (iii) Week on week trade has improved since 5th of August when Covid-19 measures were introduced within the town.



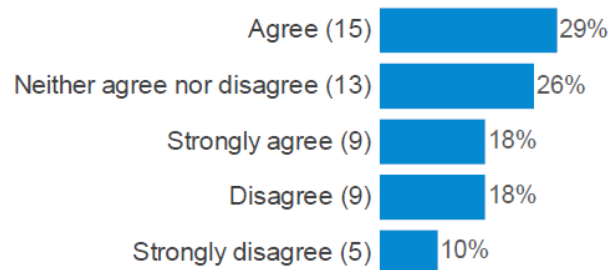
A total of 35 businesses (68%) disagreed or strongly disagreed that week on week trade has improved since measures were introduced in town centres. Most businesses (n=18) strongly disagreed with this statement. Only 6 businesses (12%) agreed that trade has improved since measures were introduced.

(iv) The town centre changes have decreased the risk of Covid-19 transmission.



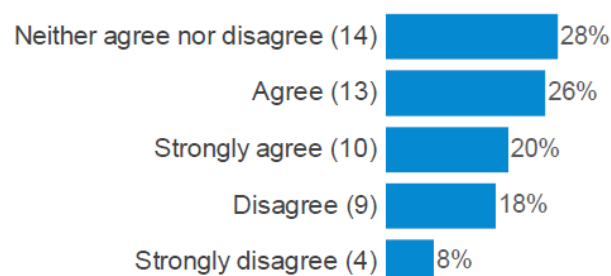
The majority of businesses (43%) were unsure whether the town changes have decreased the risk of Covid-19 transmission. The analysis indicated that there is a relatively equal agreement and disagreement on this topic. 30% of businesses agree or strongly agree that the town centre changes has decreased the risk of covid-19 transmission whilst 28% of businesses disagreed.

(v) Town centre changes have improved pedestrian safety.



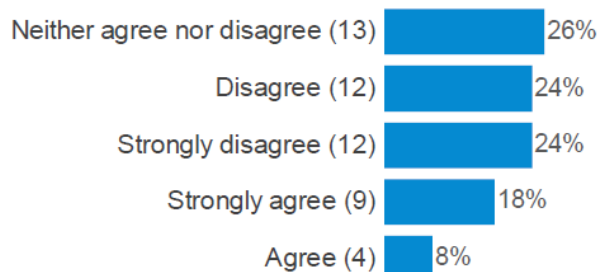
The majority of businesses (37%) either strongly agreed or agreed that changes to town centres has improved pedestrian safety whereas 28% disagreed or strongly disagreed with this statement. It was seen that 26% of businesses neither agreed nor disagreed with this statement indicating that they are unsure.

(vi) The town Centre changes have reduced traffic noise and vehicle pollution.



46% of businesses either strongly agreed or agreed that the measures introduced in town centres has reduced traffic noise and vehicle pollution. In contrast only 26% of businesses disagreed or strongly disagreed with this statement.

- (vii) The town centre changes have improved the feel and look of the town centres and make it a place people want to visit.



The majority of businesses (48%) either strongly disagreed or disagreed that the town centre changes have improved the feel and look of the town centres. In contrast only 26% of businesses agreed that the changes make the town a place people want to visit. It was seen that 1 in 4 businesses neither agreed nor disagreed with this statement.

The following section of this report includes an overview of the responses based on town centre.

Carmarthen Town Responses

Carmarthen Town Businesses N=35	Number of businesses				
	Strongly agree	Agree	Neither	Disagree	Strongly disagree
Covid-19 has had a general negative impact on trade since March 2020 with a general downturn in economic performance.	30	5	0	0	0
Week on week trade has improved since restrictions were lifted on 2 July 2020.	2	10	6	13	4
Week on week trade has improved since 5th of August when Covid-19 measures were introduced within the town.	1	3	7	13	11
The town centre changes have decreased the risk of Covid-19 transmission.	4	6	13	5	7
Town centre changes have improved pedestrian safety.	6	11	6	7	5
The town Centre changes have reduced traffic noise and vehicle pollution.	8	9	7	8	3
The town centre changes have improved the feel and look of the town centres and make it a place people want to visit.	7	2	6	10	10

In total of 26 comments were received from businesses regarding their views on the implemented measures. A summary of the key themes is presented below:

- Many businesses noted that the changes implemented on King Street Carmarthen has had a significant impact on trade. 6 of the comments relating to King street indicated trade has been impacted negatively.
 - o *Open king queen street for traffic, it's taken away our trade*
 - o *The pedestrianisation to king st has been a disaster for my business it's had a total negative effect on my clientele and is continuing to effect all aspects of the day to day trade*
 - o *NOT PEDESTRIANISE KING STREET, AND DO IS SOON (there will be no businesses left at this rate)*
 - o *Re open King Street. You said that it was pedestrianised for public safety and to keep social distancing. You have certainly done that as there are no customers on the street anymore. If you continue to do so, how about putting st peter's cark park free of charge in order to encourage people to walk down king street. I have only been open a little over a year and the changes that you have made are making things very difficult to keep going, for any business let alone a new business. Re-open King Street and give the businesses the chance that they deserve to fight to stay open...*

- Some comments suggest that measures should continue to be implemented. An example of comments is provided below:
 - o *Notts Square should remain pedestrianised*
 - o *Keep the pedestrianisation scheme in place indefinitely. My business had the best August ever with the introduction of pedestrianisation. We have previously struggled massively with cars and vans parking illegally and blocking my shop front, and this has been solved completely and increased trade hugely. I can't support the continued pedestrianisation enough.*
 - o *King Street premaritally pedestrianised and planning eased to create a Al Fresco experience and allow small stalls on the street to create in a focal point/destination in the town.*

- A number of comments related to the difficulty of some customers accessing services. Due to the road closures, elderly clients and individuals with disabilities are unable to get dropped off which has been problematic.
 - o *Access is needed for elderly people very discriminative. Delivery needs to be more flexible*
 - o *Restricting access to King Street and Notts Square to disabled and older, less mobile visitors who are regularly dropped off and picked up in the street*
 - o *I have repeatedly raised my concerns about the pedestrianisation of King Street. I believe that it has had a very negative impact on older people and those unable to walk the length of the street. This is not really about my business, this isn't our main customer base however from personal experience of living with someone*

with a disability it is something I feel very strongly about. Limiting people with mobility concerns to accessing banking, attending the hairdresser, going to the foot health clinic, the coop, the sports injury service, etc. Is tantamount to discrimination.

- A number of comments noted that delivery to businesses has been affected due to the road closure times.
 - o *Delivery needs to be more flexible*
 - o *If you are primarily referring to the closure of King Street the major impact on my business has been delivery drivers not being able to get into King Street during the closed periods. I'm still getting deliveries returned to depots, very frustrating , especially this time of year. This issue needs to be overcome before the closure should be considered to be permanent.*
 - o *Some of the changes are good, but for us as a business having the closed makes it harder for deliveries, You need to let delivery driver through, we need more footfall up Kings Street.*

- Some businesses offered suggestions on how measures could be improved in order to support businesses. The suggestions are provided below:
 - o *Can the barrier at the entrance not be manned, as I understand it is in New Quay and also in Tenby, so that bona fide vehicles (including people with medical appointments at Hearing Aid Solutions), and other services like opticians and hairdressers, can be allowed through at slow speed?*
 - o *We've suggested one way up, the other down in Blue St and suggested a liftable barrier at the end of King St*
 - o *Help the small businesses to grow, where footfall is low put the car park free parking everyday encouraging people to shop in parts they wouldn't normally visit*
 - o *The pedestrianisation of King street 7days a week is completely unnecessary 7 days per week. The footfall on a Sunday is non-existent but yet the Council decide to pay a member of staff double time to close a relatively unused street on a Sunday.*
 - o *Pedestrian One-Way on very narrow streets where traffic has not been closed off. (Left Hand Down, Right Hand Up, same as cars). This is to avoid people being forced into the road, so as to not get too close to oncoming pedestrians.*
 - o *Day time closure of King Street should become permanent but the alleyways leading onto the street should not have the one way restrictions - they don't work and are quite unnecessary, as you can't catch infections from a brief passing of someone in the street.*

Llanelli Town Centre

Llanelli Town Businesses N=9	Number of businesses				
	Strongly agree	Agree	Neither	Disagree	Strongly disagree
Covid-19 has had a general negative impact on trade since March 2020 with a general downturn in economic performance.	7	1	1	0	0
Week on week trade has improved since restrictions were lifted on 2 July 2020.	0	1	1	2	5
Week on week trade has improved since 5th of August when Covid-19 measures were introduced within the town.	0	0	1	2	6
The town centre changes have decreased the risk of Covid-19 transmission.	0	3	5	0	1
Town centre changes have improved pedestrian safety.	1	3	4	1	0
The town Centre changes have reduced traffic noise and vehicle pollution.	0	3	5	1	0
The town centre changes have improved the feel and look of the town centres and make it a place people want to visit.	1	1	5	1	1

A total of 5 comments were left by businesses from the Llanelli Town area. These comments are presented below as no common themes could be drawn from the data.

- *we just need to get more visitors and publicize what we have to offer as a town there has been a negative impact due to out of town shopping.*
- *Free parking, permanent pedestrianisation*
- *The closure from John Street around past our premises in Stepney Street was instigated without any consultation with us. In fact we found out from the press! It has negatively impacted our business, a business which has been massively impacted due to covid-19, something that many people do not realise. Our clients who are dealing with emotional trauma at the worst possible time and many of whom have mobility issues due to the advanced age that half of the population typically lose a spouse, are unable to be dropped off outside our premises; we are unable to pull up outside to collect or drop off items, including when we return cremated remains to our premises. In turn families coming to us to collect their loved ones ashes are unable to pull up outside to do so. Instead they would have to carry them across town!!! Additionally we are unable to offer families the option of leaving from the front of our premises for them to follow behind in their own cars anymore, all because the council, who are our landlords, have without consultation closed access to our premises without even letting us know that they have done so! We have written and telephoned to complain, eventually taking to social media, and yet we have NEVER received a single response. Only one business has made use of the road closure and even they only used some parking bays for tables they didn't use the road. Meanwhile we have*

had our business affected to the extent that we do not know if we can continue, certainly in our current location. We would never have rented premises in a pedestrianised area and yet our own council, our own landlords did this to us supposedly with the aim of helping businesses in the town! An absolute joke and after many months of being ignored I am frankly furious...

- *To be consulted before any changes are made*
- *Fill all the empty shops*

Ammanford Town Centre

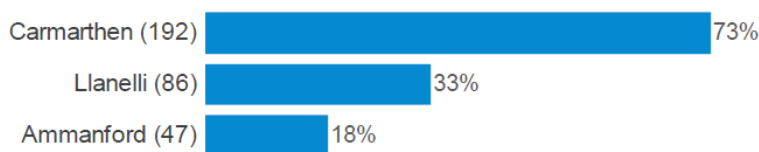
Ammanford Town Businesses N=4	Number of businesses				
	Strongly agree	Agree	Neither	Disagree	Strongly disagree
Covid-19 has had a general negative impact on trade since March 2020 with a general downturn in economic performance.	4	0	0	0	0
Week on week trade has improved since restrictions were lifted on 2 July 2020.	0	0	2	0	2
Week on week trade has improved since 5th of August when Covid-19 measures were introduced within the town.	1	1	0	1	1
The town centre changes have decreased the risk of Covid-19 transmission.	0	1	3	0	1
Town centre changes have improved pedestrian safety.	1	0	2	1	0
The town Centre changes have reduced traffic noise and vehicle pollution.	0	2	0	0	1
The town centre changes have improved the feel and look of the town centres and make it a place people want to visit.	0	1	2	0	1

Only 1 business left a comment regarding Ammanford town centre. The comment is presented below as no common themes could be drawn from the data.

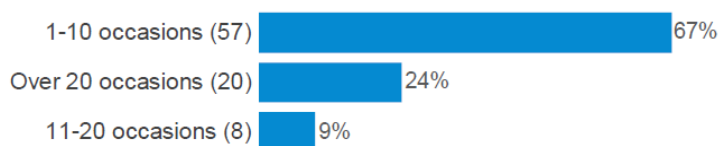
- *Ammanford needs more investment and personally I think the cross roads section needs to be pedestrianised*

4) Public survey: Summary of key overall results

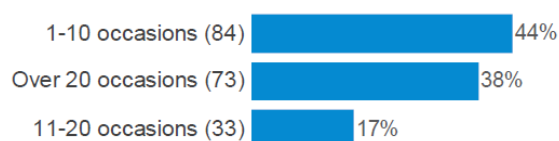
Since the 5th of August which of the following town centres have you visited?



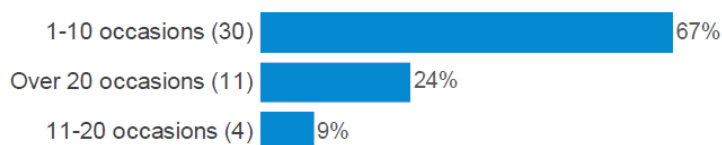
How often have you visited Llanelli town centre?



How often have you visited Carmarthen town centre?



How often have you visited Ammanford town centre?



Overall View

Overall view (n=286)	AIS	Strongly agree	Agree	Neither	Disagree	Strongly disagree
The town centre changes have decreased the risk of Covid-19 transmission.	0.03	15.3%	22.0%	28.4%	19.4%	14.9%
The town centre changes have improved pedestrian safety.	0.27	23.6%	23.2%	23.2%	16.9%	13.1%
The town centre changes have reduced traffic noise and vehicle pollution.	0.28	23.0%	23.0%	25.3%	16.6%	12.1%
The town centre changes have improved the feel and look of the town centres and make it a place I want to visit.	-0.09	22.5%	15.4%	17.2%	20.6%	24.38%

Llanelli Town Centre

Llanelli Town Centre N=86	AIS	Strongly agree	Agree	Neither	Disagree	Strongly disagree
The town centre changes have decreased the risk of Covid-19 transmission.	0.20	17.4%	26.7%	27.9%	14.0%	14.0%
The town centre changes have improved pedestrian safety.	0.48	29.1%	24.4%	23.3%	11.6%	11.6%
The town centre changes have reduced traffic noise and vehicle pollution.	0.57	27.9%	26.7%	29.1%	7.0%	9.3%
The town centre changes have improved the feel and look of the town centres and make it a place I want to visit.	0.08	24.4%	19.8%	16.3%	18.6%	20.9%

A total of 41 comments were left by individuals who had visited Llanelli town centre. A summary of the key themes is provided below.

- Many respondents indicated that the road closures has had a significant impact on individuals with disabilities from visiting the town centre. Some indicated that road closures have restricted the use of some disabled parking bays. An example of some comments are provided below.
 - o *Absolutely no consideration has been made for disabled people at all.*
 - o *Because the disabled parking has been taken away in Cowell Street I have only been to Llanelli twice once could not park so drove home and the other time had to wait until after 4pm.*
- A number of respondents noted that they would like the pedestrianisation should continue as it facilitates a better atmosphere in the town.
 - o *I think having the extra seating outside Marzanos is fab, especially on a nice day. You feel like you're abroad and it doesn't affect the disabled parking either as there's still plenty of it!*
 - o *keep the roads in town closed to vehicles*
 - o *better atmosphere*
 - o *continue with the changes, allow disabled parking*
- Whilst not directly associated with the question, some respondents noted that there is a need to increase the number of shops in the town centre.

- Members of the public took the opportunity to provide some suggestions on how the road closures in Llanelli town centre could be improved. Suggestions have been summarised and presented below.
 - o Increase free and disabled parking
 - o Increase PCSO and Police presence to enforce.

Carmarthen Town Centre

Carmarthen Town Centre N=191	AIS	Strongly agree	Agree	Neither	Disagree	Strongly disagree
The town centre changes have decreased the risk of Covid-19 transmission.	0.10	16.7%	24.0%	26.0%	19.8%	13.5%
The town centre changes have improved pedestrian safety.	0.36	24.1%	26.7%	21.5%	16.2%	11.5%
The town centre changes have reduced traffic noise and vehicle pollution.	0.32	24.2%	23.7%	23.2%	17.9%	11.1%
The town centre changes have improved the feel and look of the town centres and make it a place I want to visit.	0.03	23.6%	18.8%	15.7%	20.4%	21.5%

A total of 101 respondents left a comment relating to Carmarthen town centre. A summary of the key themes is provided below.

- Many expressed that the road closures have had a significant negative impact on elderly and disabled customers. Several respondents noted that the long distance between car parks and shops has deterred them from visiting. King street in particular was noted as a key problem to elderly and disabled customers. Examples of comments are provided below.
 - o *Disagree with the closure of King Street, unable to drop off my elderly relative for hairdressers appointments and opticians. The pavement is large enough to accommodate pedestrians especially as it is larger than many of the other streets which are not pedestrianised.*

- *I cannot use king Street as before I went 2/3 times a week. Went to bank, butcher and Co-op put each goods straight into car as I am disabled. Now I go to tumble a lot more friendly. King st shops are losing out.*
- *I do not understand the need to close King St in Carmarthen to cars during the day. This is discriminating against the elderly, disabled and less mobile who cannot now access King St premises. It is Disability Discrimination.*
- *I would not pedestrianised King Street. Makes it incredibly hard for me to get to my regular appointment as I have to be dropped off.*
- *King street should be open to some vehicles. Elderly or infirm people have been unable to be dropped off for appointments to hairdressers opticians and podiatry premises making it difficult for them to access these and other services. I do not think this is acceptable.*
- Whilst many respondents took the opportunity to raise concerns, a number of respondents expressed that the pedestrianised areas have been beneficial. More specifically, the road closures have had a positive influence on the atmosphere and safety.
 - *I would love to see the Kings street closure continued in some format. It increases footfall when you can browse the independent shop and stand back from the narrow pavements in to the roadway too.*
 - *I'm a fan of the King Street closure but not sure the Jackson's lane thing works, seems to be mostly ignored Perhaps could have more advance warning that it is one way.*
 - *Making the pedestrianised area in king st a permanent measure would be good. Or access only to vehicles supplying businesses . Also current measure stops cyclists using the street. This should be looked at and tweaked if possible to allow cyclists*
 - *To continue the current arrangements in terms of King Street, Nott Square and Guildhall Square.*
 - *It's so much easier to walk around with my small child*
- Some indicated that roads should be opened for disability badge holders and delivery vehicles. Some suggested that this should be at a reduced speed limit and enforced.
- Some noted that the one way systems do not work as they are largely ignored. More signage and enforcement officers should be present to police this.
- A number of respondents indicated that the road closures has had a detrimental impact on small and starter businesses.

Ammanford Town Centre

Ammanford Town Centre N=47	AIS	Strongly agree	Agree	Neither	Disagree	Strongly disagree
The town centre changes have decreased the risk of Covid-19 transmission.	-0.19	8.5%	14.9%	42.6%	17.0%	17.0%
The town centre changes have improved pedestrian safety.	0.00	14.9%	17.0%	36.2%	17.0%	14.9%
The town centre changes have reduced traffic noise and vehicle pollution.	0.02	10.9%	21.7%	37.0%	19.6%	10.9%
The town centre changes have improved the feel and look of the town centres and make it a place I want to visit.	-0.45	8.5%	12.8%	29.8%	23.4%	25.5%

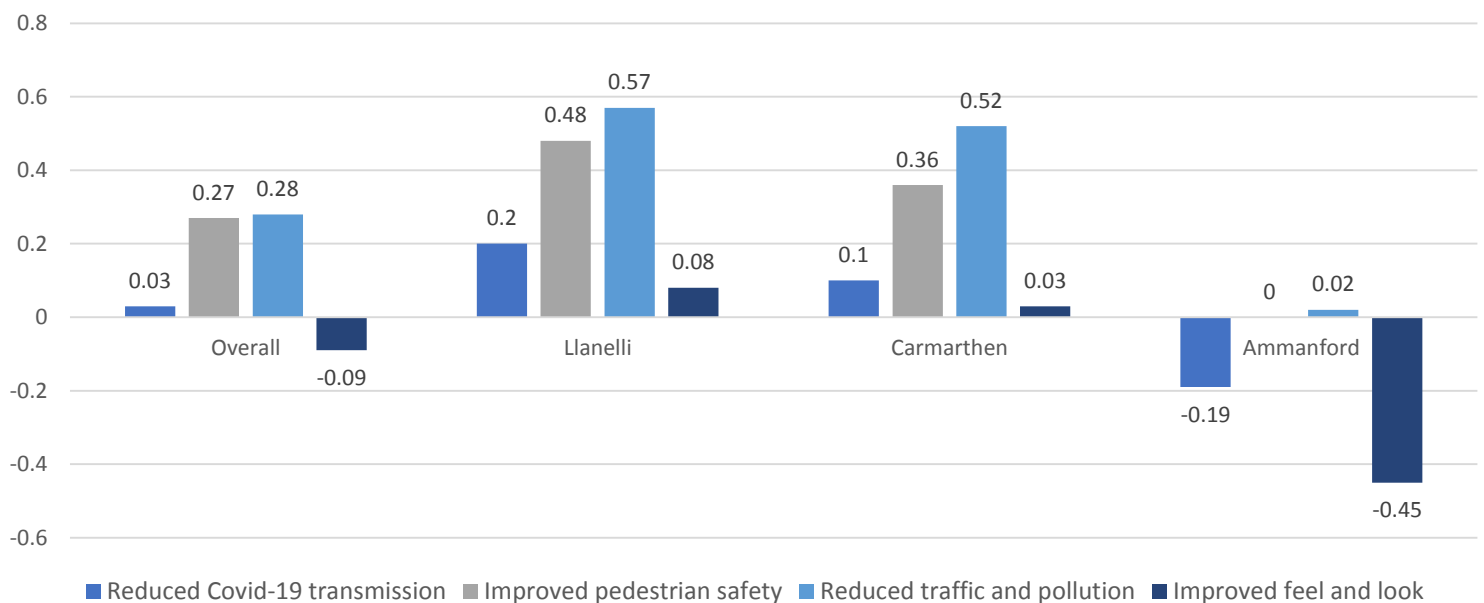
A total of 15 comments were received on Ammanford town centre. The majority of comments related to the lack of changes implemented in the town. Moreover, respondents indicated that parking is an issue in the town centre. Comments are displayed below.

- *Free parking needs to be brought back, that was a positive during the lockdown. Ammanford seems to be back to normal, the queuing systems are no more...*
- *Hardly anything implemented but the one way system by the lights has been ignored due to poor signage*
- *I work in Quay Street in Ammanford which as you know is already pedestrianised - there are ample opportunities for social distancing but I am concerned about the seating area outside the post office & further down the street - people have continued to congregate in these areas & have not been displaying social distancing practices - can these areas be temporarily be removed or reduced?*
- *Limit the group size of teenagers hanging around the town. Reduce the parking charges to the Ammanford.*
- *make parking free*
- *One way system under scaffolding is pointless. As long as school children congregate in the arcade without masks it will remain unsafe for pedestrians to walk down.*
- *Pathetic changes in Ammanford*
- *The traffic crossing outside wilko in ammanford is terrible. Even before covid if someone with a buggy or mobility scooter is at the crossing its impossible*

without stepping into the road to get past those waiting. The shrubbery and trees there are over grown and now with covid restrictions the pavement barely qualifies as a safe passing point, it's barely a metre wide, yet the council spent goodness knows how much on widening the path by the pensioners hall a relatively low traffic area. Please consider the work that so desperately needs doing by wilko.

- There has been no improvements in Ammanford people queuing across the footfall to use bank machines and ques foe shops and shop not implementing hand hygiene
- Vehicles still parking in pedestrian zone, Quay St Ammanford

Public perception of Covid-19 measures introduced in town centres based on Average index score



The histogram above highlights the average index scores¹ for each question overall and for each town centre. The results indicate that the town centre changes have had little impact on reducing the risk of covid-19 transmission which is indicated with an overall AIS of 0.03. In Llanelli (0.2) and Carmarthen (0.1) town centres, there seems to be a higher agreement on the positive impact of changes to reducing covid-19 transmission risk. Conversely, there seems to be a disagreement that town centre changes have had a negative impact on transmission risk in Ammanford (-0.19). Ammanford have seen very few changes to the town centre and when removed from the data, the overall AIS was 0.11 indicating an agreement that the changes have reduced the risk of covid-19 transmission in Llanelli and Carmarthen. Overall it was seen that members of the public agree that changes to town centres have had a positive impact on pedestrian safety (0.27). This can also be seen in Llanelli (0.48) and Carmarthen (0.36) town centres. As depicted in the histogram above, there is a balance of opinion in Ammanford regarding pedestrian safety. The AIS indicates that members of the public agree that changes to town centres has reduced traffic and pollution (0.28) this is also replicated across all three towns. Whilst the negative AIS suggests that the public disagree that changes to town centres has improved the look and

feel of town centres (-0.09), this may be skewed by the negative score from Ammanford town centre (-0.45). Llanelli (0.08) and Carmarthen (0.03) both showed slight agreement however not comprehensive. When Ammanford is removed from the data, it can be seen that the AIS for Carmarthen and Llanelli is 0.03 which indicates a slight agreement.