

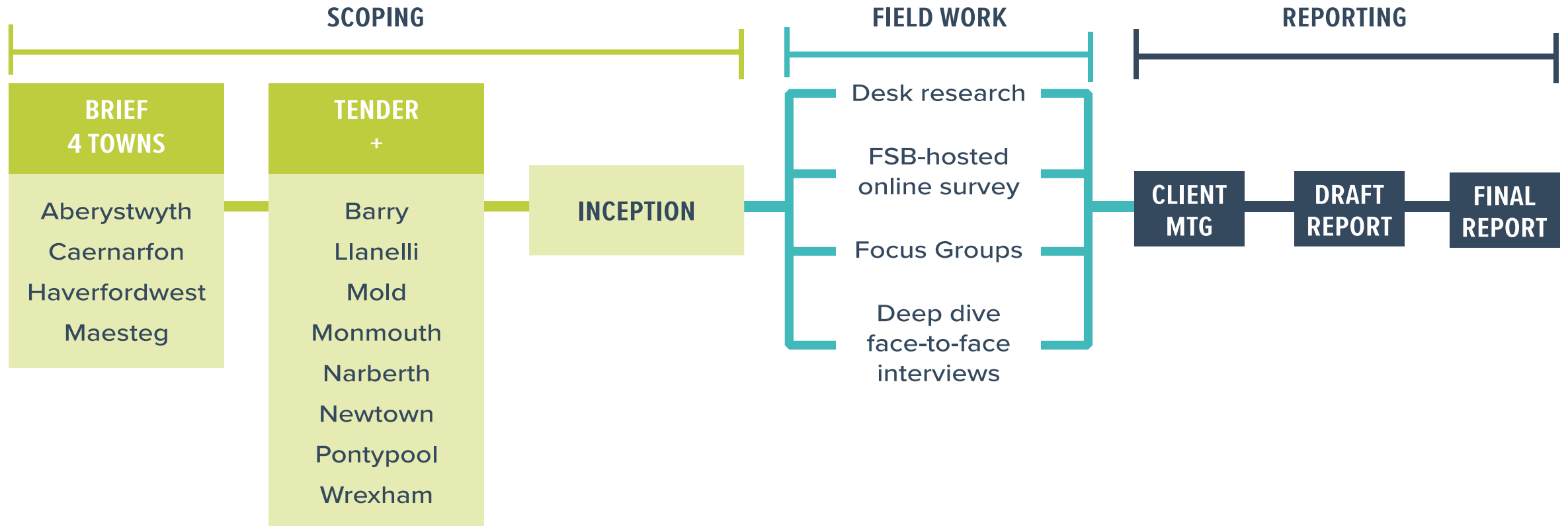


THE FUTURE OF OUR WELSH TOWNS

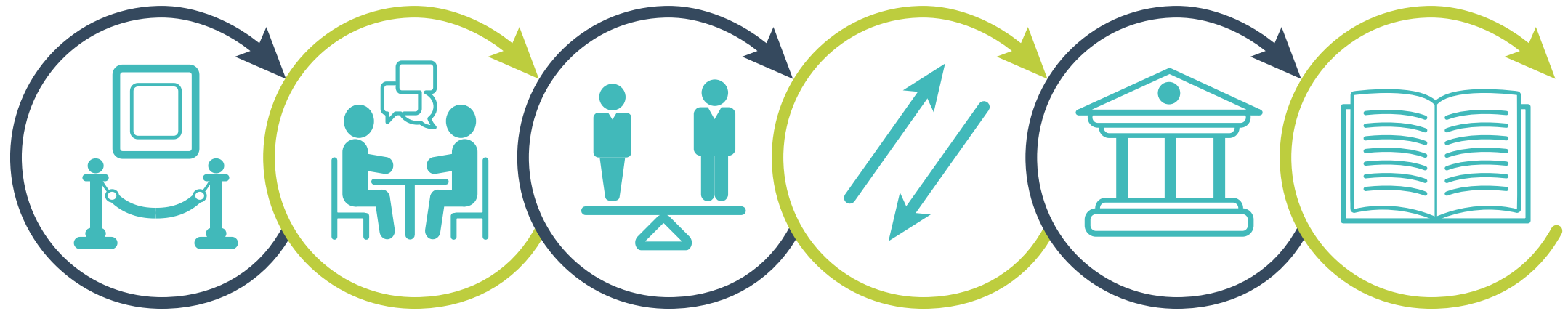
DYFODOL EIN TREFI CYMREIG

The means: to change places for the better.

Methodology



The six Cs – towns mean more than retailing...



CULTURE
e.g. Cinema
Theatre
Gallery
Events
Food

COMMERCIAL
Office
Retail
Food

**COHESION
(social)**
Egalitarianism
of setting

CONNECTIVITY
Wayfinding
Access

CIVIC
Town hall
Public squares
Heritage
Other local services

COLLEGE
Education

***The means* have developed this assessment methodology for the analysis of centres which can:**

- Produce rounded strategies that consider the different aspects and functions of towns
- Involve different stakeholders in the task of improvement, and building a coalition interested and capable of seeing strategies implemented

...but retailing remains important



6% of Welsh
GVA is in retail



137,000 jobs
in retail in Wales



12,880 retail
outlets in Wales



9% of Welsh
businesses are in retail



25% of all business
rates comes from retail

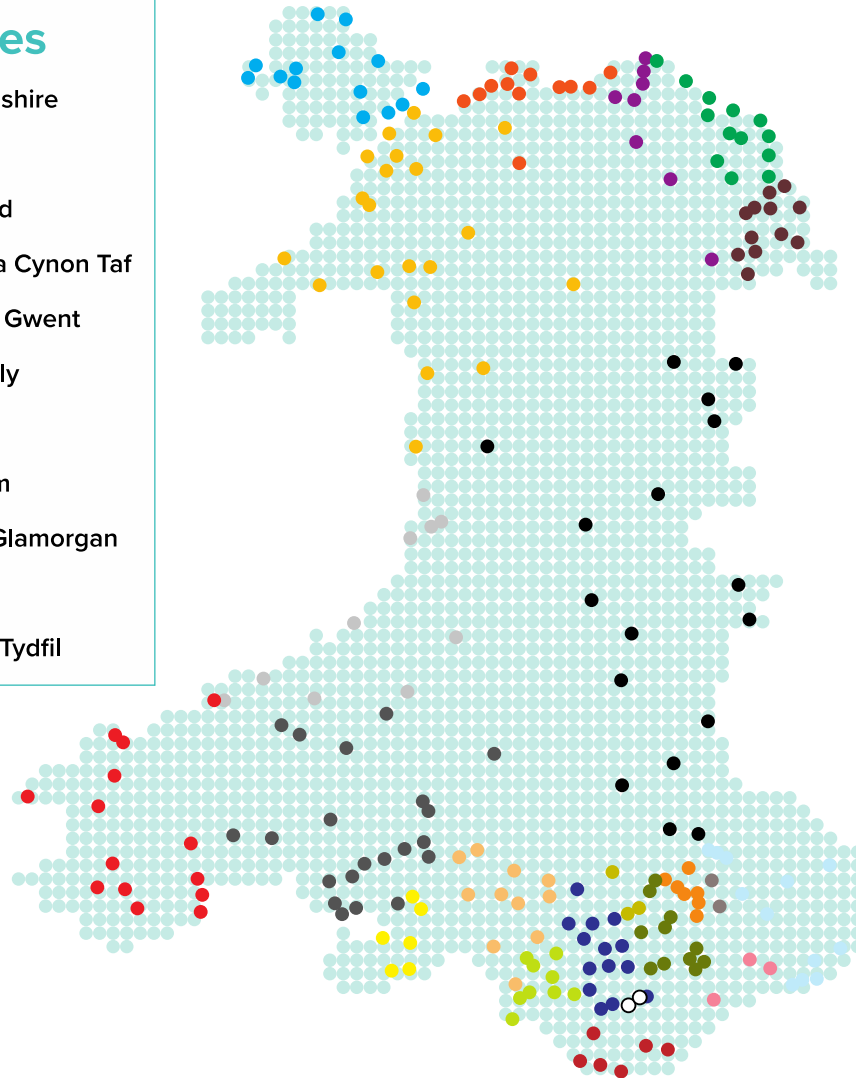
However

Over 5 years 9000 comparison shops have closed across the UK – 5% of the stock

New openings fallen by 11% across the UK

“bricks and mortar retail crisis rippling through UK property sector”

Location of small towns in Wales



- 40% of the Welsh population lives in small towns of less than 20,000
- Most situated on the M4 corridor and the A55
- Wales has highest proportion of people travelling to work by car of any region within GB
- Just over half Wales employees make the journey to work in less than 20 minutes; and
- 85% make it in less than 40 minutes

Megatrends affecting towns

Towns in Wales are being shaped by 'megatrends', trends that are globally pervasive and driving change:

- Social and demographic changes
- Urbanisation to cities and clustering
- Technological breakthroughs and changes in consumption patterns



Social and demographic changes

- Based on projections for the 2028 UK population there will be large increases in the number of people aged 60-80
- Settlements outside major urban zones are set for almost half their residents to be aged over 50
- Based on 2014 figures, the sector of the population set to grow the fastest in every region in Britain is those aged 65 and over
- The number of people aged over 65 is set to increase by 36.6%
- While the number of children is set to decrease by 1.5% by 2041
- Cardiff has got younger since around 1991 whilst population growth in towns and villages in Wales is skewed towards the over 45s



Urbanisation to cities and clustering



Over half the world's population is urbanised and cities are growing at a faster rate than ever

- Welsh Government's economic policy focuses on 'city-regions' and two 'City Deals' have been signed in Wales
- Cardiff and the Vale of Glamorgan have a GVA per head of £24,701, but a short distance away in the Gwent Valleys this figure is £14,759. Anglesey is £13,655
- Towns in Wales should plan to cope with a future of relatively low productivity, and explore ways in which jobs can be drawn from dominant cities to smaller locations

Technological breakthroughs and changes in consumption patterns



Welsh shopping habits have modernised in pace with the rest of the UK. The average monthly online spend is £74 while the UK average is £89.



In particular 48% of online shoppers in Wales regularly buy clothes. This is affecting the composition and function of the high street and consequently the way towns will position themselves to their existing and prospective residents.



Wales use of smartphone for online purchases outnumbers the UK with 34% compared to 28%, pointing to a dependency on external Wi-Fi sources or mobile data.

Exemplars from across Europe

The German IBA Emscher Project

- A programme of structural change in the German Ruhr region based on voluntary partnerships between numerous authorities built on social, cultural and ecologic ideas.

French resistance to supermarkets

- Strict planning laws and regulation regarding use classes in town centres, and planning permissions for large retailers outside of towns.

The future of Irish towns

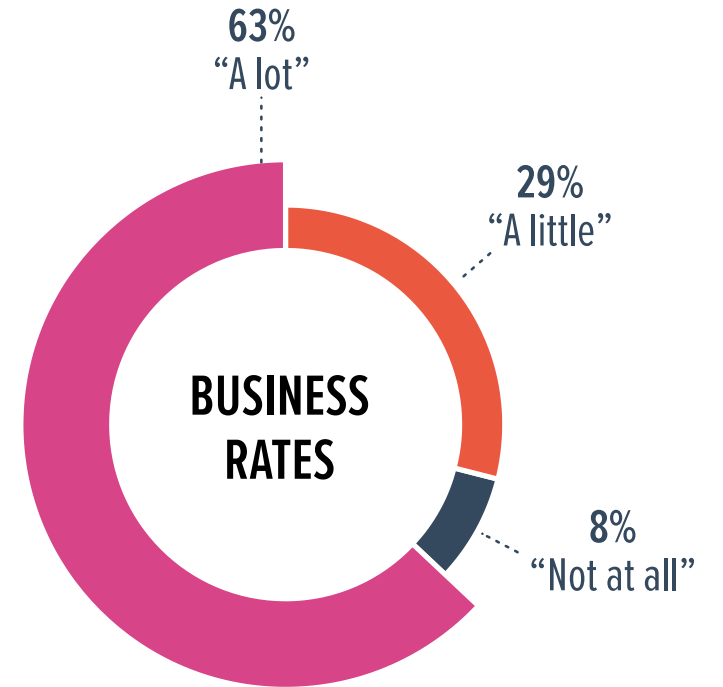
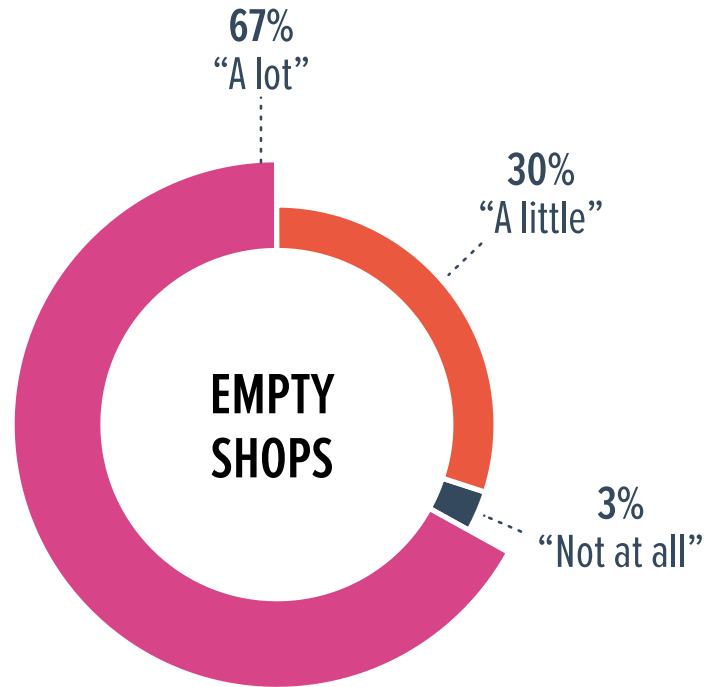
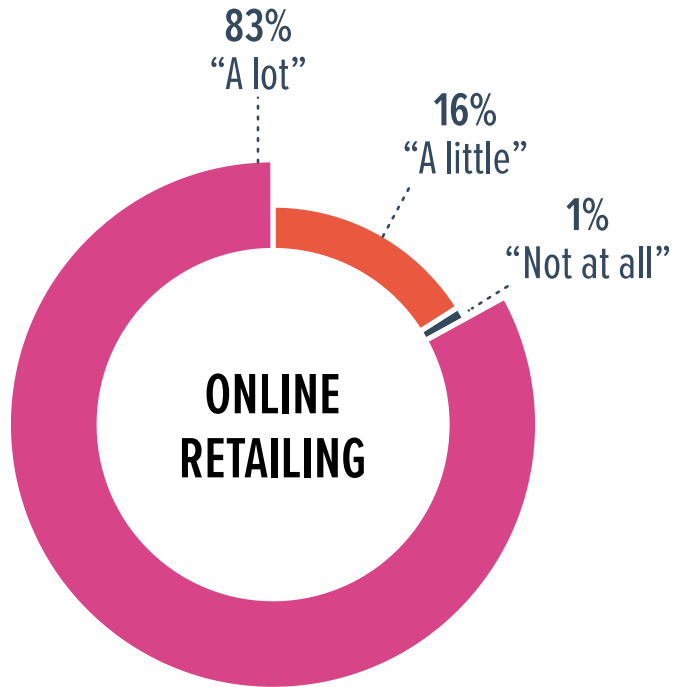
- Clear plans with a vision, a strategy, a programme of projects, and key performance indicators adopted by steering groups of local stakeholders working in partnership with local government.

The global phenomena of CittaSlow

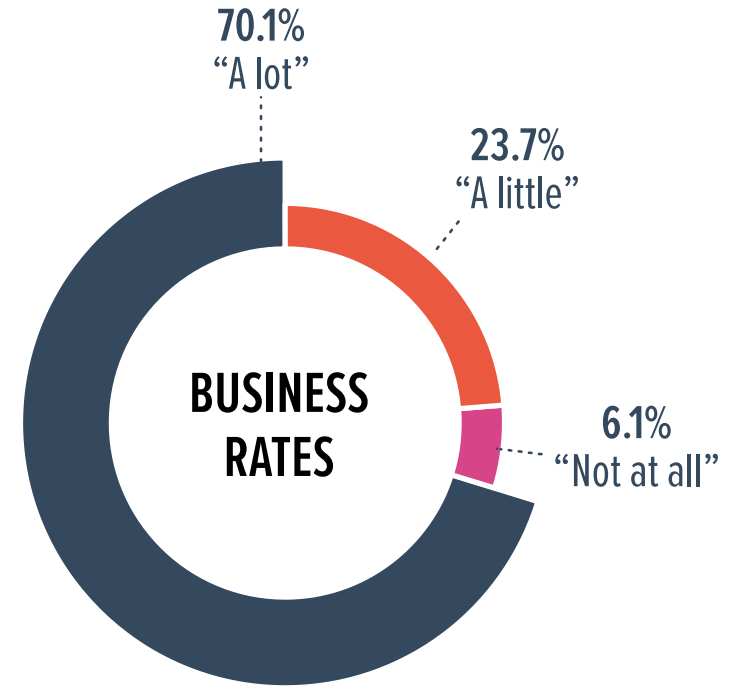
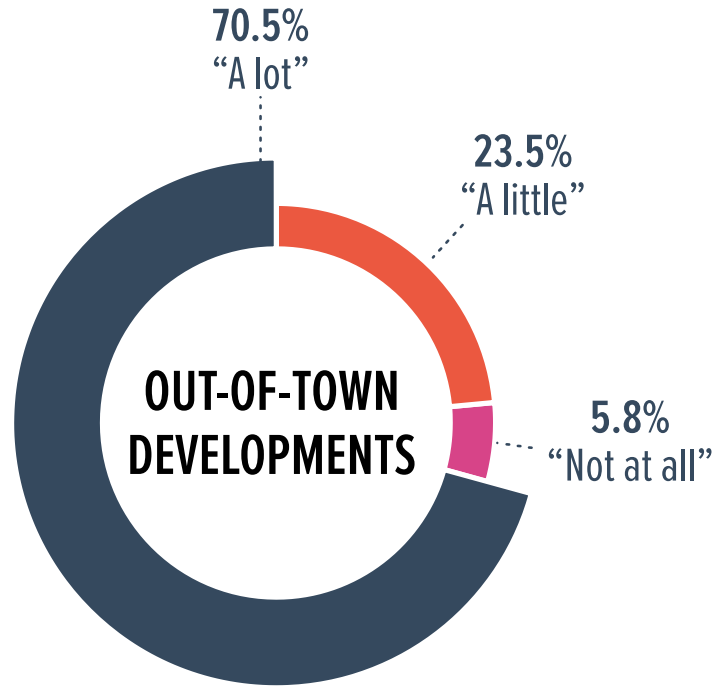
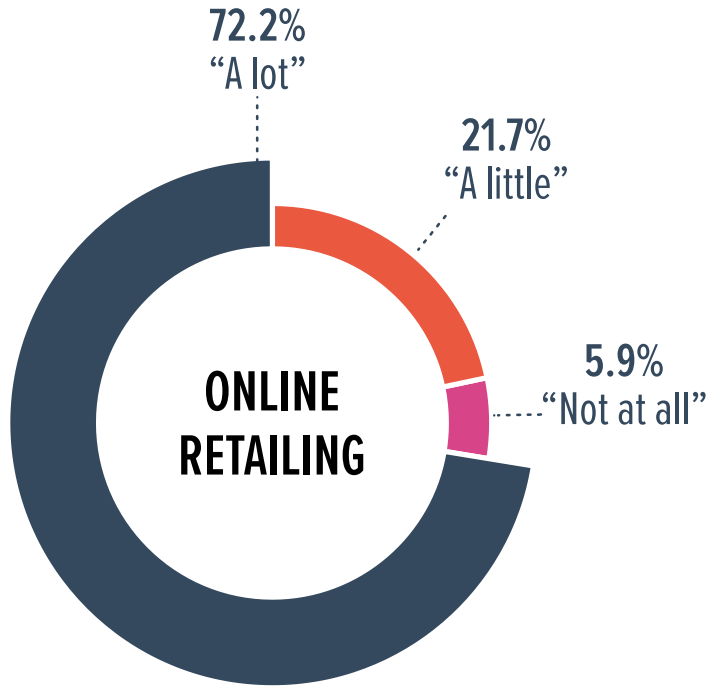
- A movement based on a very human appeal to preserve the unique characteristics of each town in the face of a ever-globalising world.



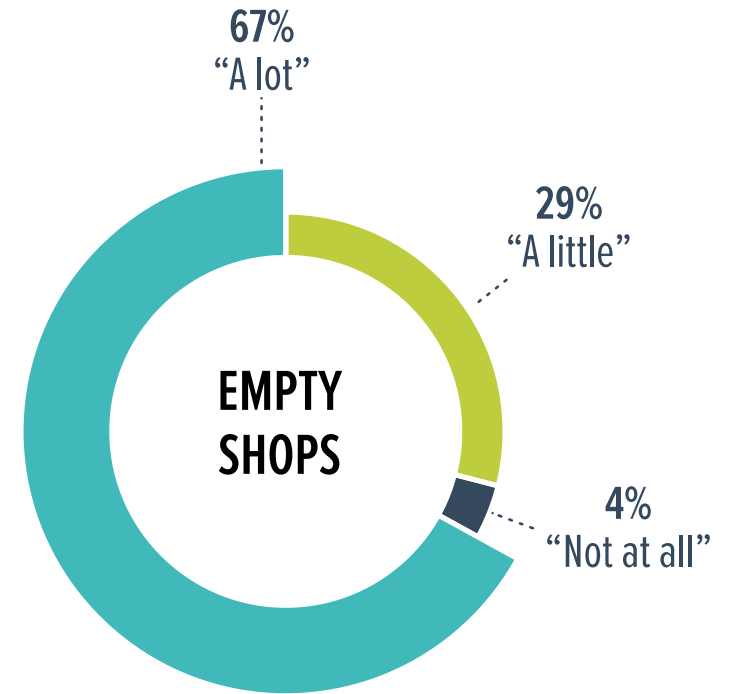
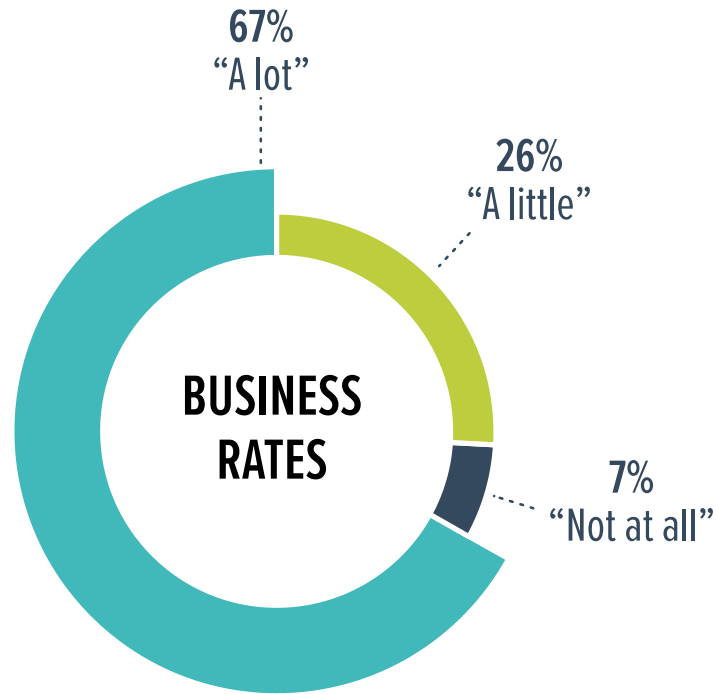
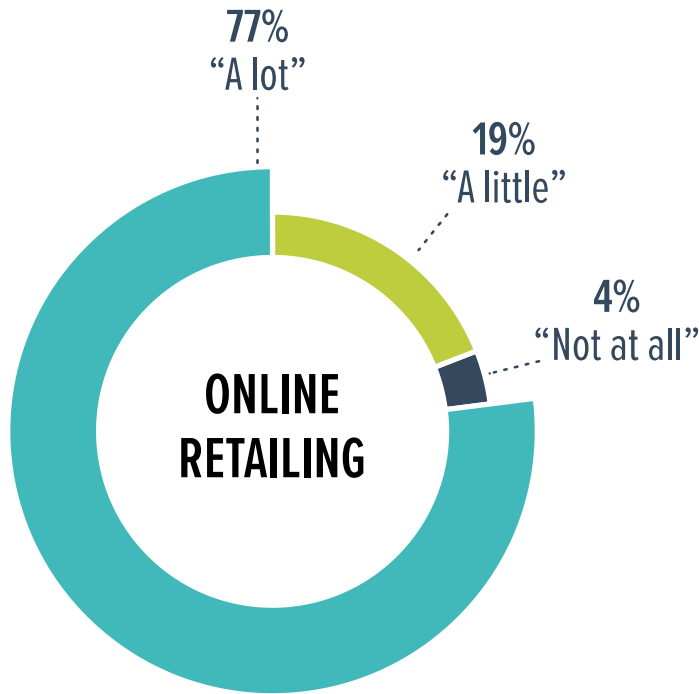
Top three factors that detract from the performance of Welsh Town Centres: 1-to-1 Survey Results



Top three factors that detract from the performance of Welsh Town Centres: Online Survey Results



Top three factors that detract from the performance of Welsh Town Centres: Combined Results



A photograph of a street scene with colorful buildings and cars, overlaid with a semi-transparent blue filter. The text "PROPOSALS FOR CHANGE" is centered in white, bold, uppercase letters.

PROPOSALS FOR CHANGE

1. Delivering a response

- **Better stakeholder engagement**
 - In particular getting businesses involved
- **Published town strategies in every town**
 - Ensuring the ownership is local
- **Introduce a Future of Welsh Towns Fund**
 - The fund would support towns to develop and deliver their town strategy
- **Incorporating demographic change in strategies**
 - Looking at how future trends will change local economy
- **Town meetings**
 - For example Landsgemeinde or 'cantonal assembly' in Switzerland



*It's about localism,
what works as a model
for one town won't
work for others.
Maesteg*

2. The shift to internet shopping

- **Digital town centre managers**
 - Collating the effort of independent businesses into one town offer, regularly updated
- **Working with suppliers on quality**
 - Competing on price unsustainable
- **Maximising the role of local media**
 - Generating content on uniqueness of your town

A customer asked me to hold a costume for 24 hours in case the version she intended ordering off the web could not be delivered in time.



3. The high street experience

- **Creating a curated experience**
 - Town experience far more than a commercial one, leisure, culture and access to service just as important
- **Having a clear events calendar**
 - Drawing activities into towns
- **Introducing centre ambassadors**
 - Lots of towns adopting ambassadors to help curate experience
- **Delivering customer care**
 - Home delivery – competing with online
 - In-store experience – ensuring a welcome



More money needs to be spent on the promotion of culture.
Haverfordwest

4. Declining demand for commercial property

- **Consider establishing a property register**
 - Interventions often fail with absent or unidentifiable landlords
- **Opportunity Street**
 - Llanelli example of local authority acquiring and refurbishing property
- **Town Centre Improvement Zones**
 - Pooled property management could be considered

There needs to be
a register of town
centre buildings to
make it easier to
contact owners.
Haverfordwest



5. New uses: retail, offices, residential

- **Destination store**
 - Ultracomida in Narberth
- **Cultural hub**
 - Old Market Hall, Maesteg
- **Co-working space**
 - Welsh ICE, Caerphilly
- **Community space**
 - Haverhub, Haverfordwest

We need to look at
more creative forms
of public transport.
Haverfordwest

A survey form titled "CO-WORKING IN MONMOUTHSHIRE & RURAL NEWPORT". The form includes a "TAKE THE SURVEY" button in the top right corner. Below the title, there is a paragraph of text: "We are conducting research into the feasibility of a co-working space within Monmouthshire & Rural Newport, South Wales. If you freelance, work from home or run your own business in Wales then please take a moment to fill out the survey or sign up below to register your interest." Below this text is a section titled "REGISTER YOUR INTEREST" which contains an input field for "Enter your email address" and a "SUBSCRIBE" button.

6. Parking

- Out-of-town retailers clearly place premium on free parking
 - **Should businesses pay for free parking?**
- **Smart technology**
 - for example Cardiff has a smart parking app
- Centre parking charges should not be used to subsidise other services
- **Rates localisation**
 - A potential game changer for local authorities

Aberystwyth feels as far away from Cardiff as it does from London.
Aberystwyth



Parcio am **£1** **£1 parking this Saturday**
Maes Parcio Aml-Lawr Murray Street Multi Storey
Stryd Murray, Canol Tref Llanelli Car Park, Llanelli Town Centre

YMLAEN LLANELLI PROSPER TOGETHER

App launched to find Cardiff's empty parking spaces

7 November 2017

f t e Share

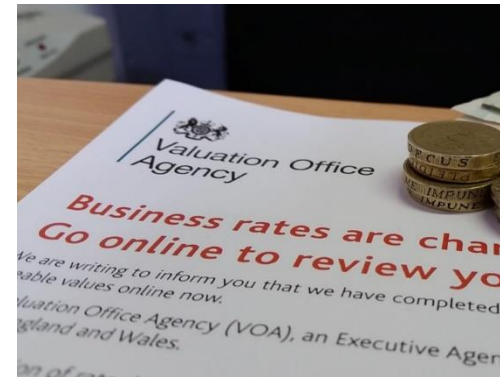


A parking app has been launched in Cardiff to help motorists find real-time available spaces in the city.

Cardiff council has installed 3,300 sensors in its parking bays and the app can also be used to pay for tickets.

7. Business rates and taxation

- **Has a significant impact**
 - But tough to change given income to government
- **Radical intervention has happened previously**
 - e.g. against buy-to-let
- **Differential VAT for on-line purchases**
 - Recently proposed by Colliers
- **Introduce a high streets relief as was recently announced by the Chancellor for England**
 - Such a relief would bring welcome short-term support but in the longer term the impact of rates on our towns will need to be considered further



Our business rates charge per square foot is higher than the new Tesco and M&S developments on the edge of town and Amazon in Swansea. How can that be right?
Aberystwyth



Station To Station News
August/September 2018

CALLING ALL BUSINESS OWNERS!

Rising Rents and Business Rates are threatening the mix of independent shops on our high streets.

They are forcing some of us to **relocate, cut back** on local staff or the services our customers need. **They will force some of us to close.**

We want to work with decision makers to **ensure that our businesses can thrive, not just survive!**



PLEASE JOIN US ON WEDS 12TH SEPTEMBER FROM 7.45PM – 9.30PM
The Portico Gallery, Knights Hill
West Norwood, SE27 0HS
Please help us plan by booking your place at bit.ly/BizRatesEvent

AT THIS EVENT WE WILL:

- Hear from local shop owners
- Hear about work taking place on this issue at a central and local government level
- Consider ways to put pressure on the Chancellor to include relief to London businesses in the budget

PANEL DISCUSSION FEATURING, AMONGST OTHERS:



What happens next

- **Building more meaningful links between business and local authorities**
- **Empowering communities to shape their own towns**
- **Having an idea of what the future of towns can be**
- **Properly funding the conversation**