

The Llandoverly Deep Place Study: A Pathway for Future Generations

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Consulting



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Contents

1.0	Introduction	4
2.0	Theoretical Context	
2.1	The Problem with Growth	4
2.2	Social Exclusion	6
2.3	Transition Theory	7
2.4	Total Place	8
2.5	The Foundational Economy	9
2.6	Anchor Institutions	11
3.0	Economic Context	
3.1	The Context for Economic Policy Making in Wales	12
3.2	The Welsh Economy	13
4.0	Methodology	
4.1	Selecting the Place	14
4.2	The Local Population	16
4.3	Research Methods	18
5.0	The Local Economy	
5.1	Carmarthenshire's Economic Approach	20
5.2	Llandovery's Economy	21
5.3	The Town Centre	23
6.0	Local Opportunities	
6.1	Food	30
6.2	Energy and Energy Efficiency	30
6.3	Health and Social Care	34
6.4	The Environment	35
6.5	E-commerce and Employment	39
7.0	Challenges	
7.1	Poverty	39
7.2	Health	41
7.3	Education and Skills	45
7.4	Housing	47
7.5	Transport	49
8.0	Conclusions	51
	References	54

1.0 Introduction

Two roads diverged in a wood, and I – I took the one less travelled by,
and that has made all the difference.

Robert Frost, *The Road Not Taken*.

Deep Place is grounded in an empirical concern with how to achieve more economically, socially, environmentally and culturally sustainable places and communities. The approach is based on the premise that a properly functioning economy should add to, rather than undermine, the social, environmental and cultural sustainability of places and communities. Although it is not necessarily anti-capitalist, Deep Place is concerned with the problems inherent in Neoliberalism, which is exploitative of human and natural resources as factors of production (Ostry et. al., 2016). It argues that the economy is socially constructed, and it can therefore be socially reconstructed.

Deep Place does not deny the complexity of global economic interrelationships; indeed, it fully recognises the difficulties and implications of managing and controlling these hugely complex interrelationships. That is why Deep Place is *place*-based. It argues that more localised action, based on a multiplicity of smaller choices, can often have a significant impact on strengthening community resilience against these external forces. In order to be most effective, however, it contends that local action needs to be coordinated and fully integrated: it needs to be *whole*-place.

Developed by Adamson and Lang, the first Deep Place study was undertaken in Tredegar (2014), and subsequently two further studies have been undertaken in the UK: Pontypool (2016) and Lansbury Park (2017). The central research question for the Llandovery Deep Place study remains the same as that asked in previous studies:

What type of economy and society do we need to create in Llandovery to achieve economic, social, cultural and environmental sustainability over the next generation?

Although some commonalities exist, the studies have identified a different set of responses to this question in each community. This report offers some suggestions as to what the answers may be in Llandovery.

2.0 Theoretical Context

2.1 The Problem with Growth

Growth is the generally accepted measurement of economic progress, and by which government economic policy success tends to be judged. It is assumed that because growth produced some worthwhile outcomes for a limited period of time that it is always a desirable objective (Spretnak and Capra, 1986). The central assumption of economic policy has been that everyone benefits from a growing economy. During the 1960s and 1970s there was much to support this perspective, as there was a strong correlation between GDP per capita and

some indicators of well-being such as life expectancy and literacy rates (Bleys and Whitby, 2015). Today these correlations are less clear in developed countries (Stiglitz et. al., 2009).

The main issue with growth as a measurement appears to be a continued reliance on Gross Domestic Product (GDP) as the metric on which it is commonly assessed. GDP is defined by the ONS as the value of goods and services produced during a given period. Simon Kuznets, who is credited with the original development of GDP, suggested that anything detrimental to welfare, such as inequality, poverty, and ecological degradation, should be excluded. The way that economic growth is calculated today, however, ignores Kuznets' warning (Pilling, 2018). Consequently, GDP is not a good measure of economic well-being as it fails to discriminate between costs and benefits.

There is a point beyond which continued growth in GDP ceases to contribute to improvements in the quality of life within a society (Max-Neef, 1995; Kubiszewski et. al., 2013), and leads to unsustainable and inefficient inequalities. Growth has nothing to say about inequality and, as it depends on more and more production and consumption, it would also appear to have little positive to contribute to environmental issues. Economist Partha Dasgupta has argued that whereas GDP as our standard growth measurement tells us everything about income, it tells us nothing about wealth. For example, he says 'if a wetlands is drained to make way for a shopping mall, the construction of the latter contributes to GDP, but the destruction of former goes unrecorded' (Pilling, 2018).

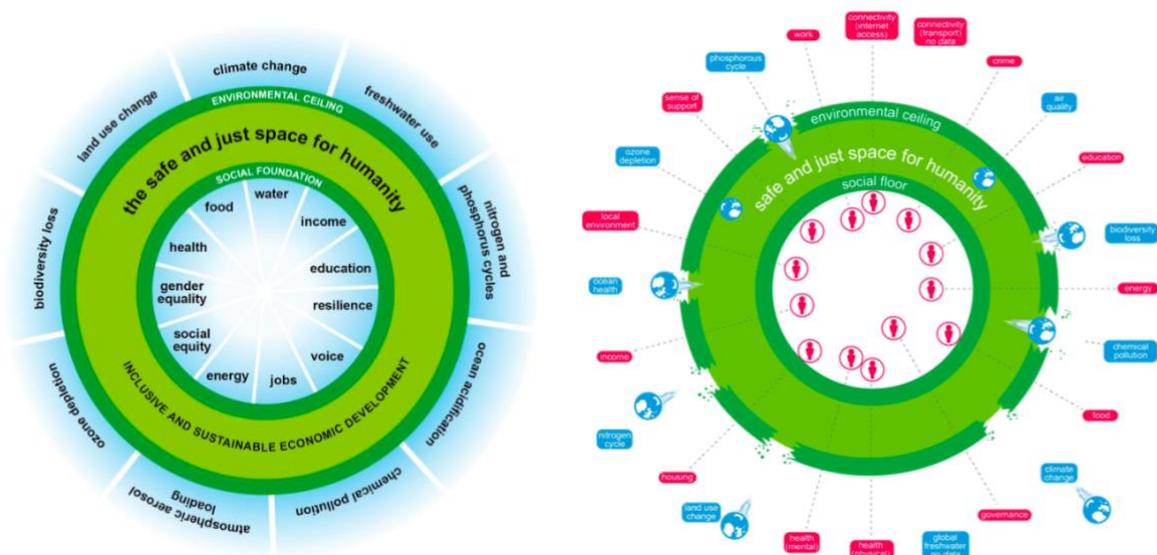
The Capital Institute (Fullerton, 2015) argued for a systems-based mindset built on the idea of 'regenerative capitalism'. Rather than a one-size-fits-all answer, it suggests that each community consists of a 'mosaic of peoples, traditions, beliefs, and institutions uniquely shaped by long term pressures of geology, human history, culture, local environment, and changing human needs'. This would appear to be closely aligned to the recent interest in 'environmental growth' (see Cornwall Council, 2016), which seeks a better balance between society, economy and environment. In essence, it seeks to redefine growth through a social and environmental lens.

The figure below shows the 'Doughnut' model as developed by Oxfam and applied to Wales. It illustrates the existence of an environmental ceiling and a social floor. The model shows that Wales exceeds its environmental ceiling in most domains:

- 55% in terms of biodiversity loss (measured via decline in farmland birds);
- 64% in terms of ocean health (measured via the percentage of UK fish harvested sustainably);
- 250% in terms of land use change;
- 410% in terms of climate change (measured by emission of MtCO₂/year).

The model also shows that Wales falls below its social floor in every domain, including:

- 26% of the adult population lack any formal qualification;
- 40% of households are in fuel poverty;
- 51% of people feel they have no say in what the government does;
- 16% of people access the natural environment less than once per week.



Source: Oxfam, 2015

As well as a central concern for both people and environment, Deep Place is based on several theoretical perspectives, including: Social Exclusion, Transition Theory, Total Place, and Foundational Economy. The remainder of this section provides an overview of each of these perspectives and how they connect to the Deep Place approach. It also provides a brief overview of the literature concerning the role of anchor institutions, which is increasingly in vogue.

2.2 Social Exclusion

The Joseph Rowntree Foundation (JRF,) has calculated that poverty costs UK public service delivery around £69bn, with the knock-on effects of child poverty costing a further £6bn and adult poverty costing £2.7bn (Bramley et. al., 2016). Whereas until recently labour market exclusion was the largest cause of poverty in the UK, 'in-work' poverty has now overtaken it (JRF, 2013). Social Exclusion theories help explain the patterns of economic and social disadvantage by demonstrating why certain communities become disengaged from the mainstream economy (See for example: Duffy, 1995; Lee et. al., 1997; Pacione, 1997; Social Exclusion Unit, 1998; and, Walker, 1997).

Income inequality in the UK has been well above the OECD average for over 30 years, and the average income of the richest 10 percent is now 10 times that of the poorest 10 percent (OECD, 2015). Conventionally, financial poverty is measured as the percentage of households earning below 60 percent of the national median household income. Using this measure the number of people living in poverty in the UK increased to 13.5m in 2014/15, up from 13.2m in 2013/14 (DWP, 2016). London has the highest poverty rate of any UK region with 27 percent, whilst Wales and the West Midlands have the joint second highest rate of poverty of all the UK regions at 23 percent, just 2 percent lower than in 1999 (Welsh Government, 2016). London also continues to be the UK region with the highest overall child poverty rate at 37 percent (CPAG, 2016). During 2014/15 the number of children living in poverty across the UK was 3.9m, 66 percent of these lived in households where at least one person was working (DWP, 2016).

Deep Place tends to adopt the 60 percent of median household income measure of relative income poverty, although there are alternative approaches to measuring poverty. The JRF has developed a Minimum Income Standard (MIS) approach, which is defined as ‘the income that people need to reach a minimum, socially acceptable standard of living in the UK, based on what members of the public think. It is calculated by specifying baskets of goods and services required by different types of households in order to meet these needs and to participate in society.’ It is important to note, however, that although relevant to discussions of poverty, the MIS is not a poverty threshold (JRF, 2016).

Poverty in rural areas is generally considered to be less visible than urban poverty. This is believed to be partly due to the more dispersed nature of rural settlements (Welsh Government, 2015), but also a result of some divergence between rural deprivation and traditional characteristics associated with urban poverty. Rural poverty tends to be more associated with low wages, than with unemployment; low-income households in rural areas are more likely to consist of two-parent families and contain older people; the built environment also tends not to conform to those found in areas of dominant discourse in poverty literature (Milbourne, 2011).

The components of deprivation in rural areas, however, also contain aspects that can be found in some post-industrial communities, albeit with subtle differences (see, for example: WLGA [2012] for a discussion). Williams and Doyle (2016) suggested these included: transport and access to services (public, as well as childcare, and digital connectivity); the economy, employment and income; housing; and ‘the rural poverty premium’ (the tendency for essential goods and services to cost poor households more). Rural poverty exists, and as with poverty found in urban areas, the challenge is to identify its particular local causes and seek ways to help ameliorate and tackle it.

2.3 Transition Theory

The transition movement is concerned with the overall supply and use of energy from fossil sources and the resulting carbon based climate change. It assumes that society will soon reach the peak point of supply of oil and that supply will thereafter diminish. The movement therefore asks what must be done now to manage the transition (see for example Hopkins, 2008). Usually referred to as ‘back casting’, transition thinking asks what future state we wish to achieve and then asks what we must do now in order to achieve it in a planned way. It suggests:

...economic relocalisation will be one of the inevitable impacts of the end of cheap transportation fuels. We must produce more of our necessities close-by anyway; why not make the immediate community the source and focus of our entire energy transition strategy (Heinberg, 2008).

Resilience, a state where communities are in control of production to meet their needs, is also important to transition thinking. It represents the capacity of communities to ‘hold together’ and function despite external shocks and pressures. Core ideas of fuel and food security derive from the concept of resilience and suggest a diminishing reliance on extended supply chains that are precarious and environmentally costly.

Like North (2013), Deep Place argues that the ability of the transition movement to achieve the necessary 'systemic' change is limited. Transition thinking separates the citizen from the state and regards aggregated individual actions as a source of global change. Deep Place argues that successful transition will require the central and local state to develop green infrastructure and incentivise sustainable consumption patterns, and for the citizen to embrace a less consumer driven lifestyle.

Legislative Context: Environment (Wales) Act 2016

The Act seeks to put in place legislation that will enable Wales' natural resources to be managed in a more pro-active, sustainable and joined-up way. It seeks to establish the necessary legislative framework to tackle climate change. The Act seeks to re-align Natural Resources Wales' (NRW) statutory purpose, and provides a framework for area based natural resource planning.

In the context of the Act, natural resources are the landscapes and habitats (including coastlines, rivers, canals, lakes, urban & rural green spaces, forests, wildlife/biodiversity) and air, together with the interconnecting trails that allow our communities, businesses and visitors to utilise and benefit from them. It also strengthens the duty on public bodies to conserve biodiversity and provides NRW with broader powers in relation to land management and experimental schemes.

The Act places a duty on NRW to prepare and publish 'area statements' identifying the risks, priorities and opportunities for natural resource management within an area. The Act also creates statutory climate change targets and budgets, provides for the creation of an advisory body on climate change and sets out the reporting duties of Welsh Ministers against the delivery of these targets.

2.4 Total Place

Total Place is the term applied to a specific approach to public service reform. Initially developed from work conducted at the Leadership Centre for Local Government, 13 pilot projects were established between 2008-2010. Total Place thinking celebrates that there is no one approach or method and that the circumstances of each place will determine the kinds of actions that emerge. The approach sought to create 'higher public value' in the provision of services, which better meet the needs of recipients whilst also improving performance and accountability of service providers. This was an alternative to more traditional approaches to achieve 'better value' (Grint, 2009).

Total Place is informed by a range of approaches including chaos theory, systems theory, change theory and leadership theory, which together create an approach that seeks to deliver services to communities in a holistic, integrated and collaborative way. The aim was to transcend traditional partnership approaches by having very real projects in which to develop the approach. It asked exactly what do our customers need and are we delivering it (LCLG 2010). As well as influencing the Deep Place Approach, Total Place appears to be entirely consistent with the Well-being of Future Generations (Wales) Act 2015, which seeks, amongst other things, to change the way that public services are delivered across Wales.

Legislative Context: The Well-Being of Future Generations (Wales) Act 2015

The Act contains seven well-being goals that all devolved public bodies in Wales must work towards:

- Prosperous Wales
- Resilient Wales
- Healthier Wales
- More Equal Wales
- Wales of Cohesive Communities
- Wales of Vibrant Culture and Thriving Welsh Language
- Globally Responsible Wales

The Act has established Public Service Boards, which must improve the economic, social, environmental and cultural well-being of their areas by working to achieve all of the well-being goals. The PSBs, and individual devolved public bodies in Wales, must work toward each of the goals by a commitment to a 'Sustainable Development Principle', which requires public bodies to consider five ways of working in all of its decisions and policies:

- Long-term
- Prevention
- Integration
- Collaboration
- Involvement

Welsh Government (2018) has also released a new Planning Policy Wales, to bring it much more in line with the principles of the Well-being of Future Generations (Wales) Act than previous Welsh planning policy. The new planning policy embraces the concept of place-making as the principle means by which planning policy in Wales should deliver on obligations under the Act.

2.5 The Foundational Economy

The term 'Foundational Economy' was defined by the Centre for Research on Social and Cultural Change (CRESC) (Bentham et. al., 2013) as:

...very large, mostly unglamorous, rather heterogeneous, and [it] is distributed across the country. It is an economy that meets everyday needs by providing taken-for-granted services and goods such as care, telecommunications or food.

CRESC argued that economic policy tends to focus on attempts to develop sectors that have been 'framed' as having potential for growth, development and export potential. The way economists and other experts frame discussions about the economy, tend to identify such sectors as the visible economy and, therefore, the main target for government policy and support funding. As a result, these favoured sectors become almost the sole focus of economic policy and regional development.

For CRESC this misplaces faith in our economic future in a sector of the economy that bears little potential to resolve our current crisis or to build a stable and sustainable economy for the future. CRESC identify two core issues: these favoured sectors are a relatively small proportion of the economy; and, we lack the policy levers to reformat the economy so that the favoured sectors are the primary economic motor, especially given that we face fierce competition from

all the other advanced economies pursuing similar strategies. CRESC also point to the significant spatial imbalance inherent in these sectors.

Significant interest in the foundation economy has emerged. In Wales, the Welsh Government now acknowledges it in its most recent economic strategy (Welsh Government, 2017), albeit through the lens of a continued commitment to sectors-based policy. More recently, the Welsh Government has launched a new fund to support the development of innovative ideas around deriving greater value from the spend of anchor institutions to support the development of the foundation economy. There is a danger, however, that some elements of the foundational economy approach are missed in this increased popularity. Castells (2011) argued that the 2008 economic crisis triggered major structural changes in the European economies that indicate where future failure and success are likely to lie, and he argued for a focus on an alternative economic approach based on a different set of values. It is important for the foundation economy to reflect this different set of values, not simply morph into a bolt-on sector in the overall drive to achieve economic growth.

The Ellen MacArthur Foundation, established to promote and support the development of the 'Circular Economy', seeks to decouple economic value creation from resource consumption. It argues that the 'take, make, dispose' Neoliberal model, relies on large quantities of easily accessible resources and energy, which are no longer available (Ellen MacArthur Foundation, 2016). Furthermore, Johansson et. al. (2005) argued for a transformation in the industrial system towards a model of the 'Distributed Economy', thereby moving away from socio-economically and environmentally unsustainable large-scale centralised production. A selective share of overall production within this model is distributed and a diverse range of activities become small-scale and flexible. In the distributed model of the economy, each node is linked to several other nodes according to the needs and deliverables of each node (Van den Dool et. al., 2009; also see: Adamson and Lang, 2015).

Lang and Marsden (2018) were concerned that the focus in economic policy should be about delivering well-being, rather than growth. Lang (2019) suggested that growth and well-being are not necessarily compatible:

Efforts to ensure that the benefits of the foundational economy are realised and that weaknesses are overcome, should be based on more appropriate measurements than GDP growth. As currently calculated, growth is a poor indicator of social and ecological well-being.

As indicated above, if the foundational economy is developed on the basis of increasing its contribution to growth, we may miss its potential value to other issues such as tackling inequality, assisting ecological regeneration, and promoting community resilience. On the other hand, a distributed, socially and ecologically grounded foundational economy would appear to offer much to these goals, and it underpins much of the thinking in this study. More recent development of 'foundational livability' by the Foundational Economy Collective (the former CRESC team) also suggests the need for a better measurement of economic progress than GDP and GVA (Froud et. al., 2018).

2.6 Anchor Institutions

Deindustrialisation, the globalisation of capital, and the decline of town centres have created precarious social and economic contexts, within which an interest in the role of what have been termed ‘anchor institutions’ has emerged. Taylor and Luter (2013) suggested that the interplay of these contextual trends ‘...caused anchor institutions to evolve as critical sources of stability, growth and development’. Such institutions were first identified in the US in the late 1960s, when many American cities were showing the clear signs of the urban decay that would soon be felt across other countries. At this time, higher education and academic medical centres in particular began to consciously act as community ‘anchors’. There is now a growing interest in other types of anchor institution, with attempts to more clearly define the form these institutions take, and the functions they can, and do perform.

Attempts to identify the characteristics of anchor institutions have become more important as the agenda has moved beyond higher education and medical institutions. Harkavy and Zuckerman (1999) suggested that towns and cities had ‘fixed assets’ that could help regenerate them, and that these assets were ‘large, spatially immobile institutions that were tied to the city and community’. Moreover, they tend to have ‘infrastructure investment in a specific community and are therefore unlikely to move’ (Fulbright-Anderson, et. al., 2001). Although there is some debate within the literature about the precise nature of anchor institutions, there appears to be an agreement on certain fundamental characteristics. These include: spatial immobility (Webber and Karlstrom, 2007), corporate status (Birch, 2007), size (McCuan, 2007; Choice Neighborhoods Grant Program, 2012) and anchor mission (Maurrasse and Harkavy, 2015).

The scale of anchor institutions like universities causes them to have a major impact on local economies in multiple ways whether by design or by default. These impacts are felt through procurement, investment, real estate development, business incubation, and in the case of universities, the purchases made by their students, faculties and staff (Hodges and Dubb, 2012). Although much of the literature on anchor institutions tends to focus on economic development, there has been a growing concern with their social development functions. (Hodges and Dubb, 2012; Smallbone et. al., 2015). Hospitals in the US have been at the forefront of this movement, as their decisions have tended to be based on their aim to use their resources to target the specific social determinants of health, including access to affordable housing, education and healthy food. Several US hospitals have now developed supplier diversity programmes, which aim to increase the number of their supplier companies that are locally owned by ethnic minorities, women and veterans (Zuckerman et. al., 2013). Similar initiatives have also been developed in the UK including, for example, the Maudsley Health Trust in South London (Smallbone et. al., 2007).

Although hospitals are clearly at the forefront of such initiatives, others have argued that, in practice, other types of anchor institutions should consider the ‘...extent to which anchors are the best equipped to address social disinvestment; perhaps...there are better opportunities for institutional anchors to partner with other vested stakeholders’ Ehlenz (2018). This suggests the need to develop local and regional partnerships of anchor institutions, with each partner contributing to the mix according to their own resources and skills. Birley (2017) has suggested some practical steps for the establishment of a network for local and regional anchors involving

a basic framework of behaviours to support shared outcomes on local economic development, participation in community wealth building, and local employment. In the UK, Preston has attracted much interest in this approach, and its apparent success is now being studied by other localities seeking to emulate it.

3.0 Economic Context

3.1 The Context for Economic Policy Making in Wales

The Global Financial Crisis of 2008 led to a significant interest in the weaknesses of the Neoliberal economic model that had dominated economic policy globally for the previous 30 years (see, for example: Atkinson, 2015; Castells, 2012; Dorling, 2015). Perhaps most influential has been Thomas Piketty's (2014) *Capital in the 21st Century*, which concluded that apart from the period between 1930 and 1975 (when there were significantly higher rates of progressive taxation), the rate of return on financial capital has historically been greater than the rate of economic growth. The result of this, Piketty conclusively demonstrated, was an increasing concentration of wealth that undermines the Neoliberal conviction of the existence of a 'trickle down' effect. Consequently, the World's richest 62 individuals now have more wealth than the poorest 50 percent of people on earth, and globally one percent of people now have as much wealth as the other 99 percent (Oxfam, 2016).

The dominant approach to economic development, based largely on the model espoused by Richard Florida (2005), remains competitive. Cities, so the logic suggests, should seek to attract the creative classes by focusing their economic development resources on projects such as sports stadia, iconic buildings, and shopping centres. Glaeser (2012) contends that, government support for struggling places and failing industries should be withdrawn as it distorts the market. Overman likewise argues that regional aid has not worked and should be removed (Engelen et. al., 2016). Following this logic, the argument is that the state should withdraw and places, principally cities and city-regions, should compete on the Darwinian basis of 'survival of the fittest'.

Alongside this emphasis on place competition, has been the growing influence of what has been termed 'New Economic Geography' (Hildreth and Bailey, 2013). New Economic Geography is essentially concerned with the spatial agglomeration of industries (Krugman, 1998), which, it argues, increases returns and knowledge spill-overs, the implication being that national economic growth will benefit as a result (Pike and Tomaney, 2009). Policies that seek to redistribute economic activity are therefore seen as endangering the argued benefits of agglomeration (Martin, 2008).

Ironically, many of those who continue to advocate Neoliberal place competition, as well as the disciples of New Economic Geography, nevertheless call for significant public sector financial support to create the conditions for the competitive success of cities. This goes beyond Florida's advocacy of pump priming the trappings of the creative classes, and includes major infrastructural projects and public sector subsidies. Massey (2010) termed the justifications put forward by those who advocate greater concentration of public sector investment in London and the South East as 'trickle-down geography'. Much like the 'trickle-

down effect', the argument that wealth will in some way geographically spread also appears groundless. London and South East now account for 36 percent of total UK GVA (McInroy, 2016).

The UK Government's growth agenda was established in 2010 with the publication of the Local Growth White Paper (HM Government, 2010), which announced the abolition of the English Regional Development Agencies (RDAs) together with the establishment of Local Enterprise Partnerships (LEPs), and the subsequent establishment of Enterprise Zones (HM Government, 2011) and City Deals (HM Government, 2012). This approach has been described as 'centrally orchestrated localism', given the role of central government in each programme (Harrison, 2008).

3.2 The Welsh Economy

The Welsh economy has clear structural weaknesses that, despite considerable European Regional Development Fund investment over an extended period, have proved difficult to overcome. In 2017/18 the employment rate for the population aged 16 to 64 in Wales was 72.7 percent compared with 74.8 percent in the UK (ONS Annual Population Survey, June 2018). The Welsh economy has the lowest productivity rate of the four UK nations or any region of England. Overall, Gross Value Added (GVA) per head in Wales has varied between 70.5 percent and 74.4 percent of the UK average since devolution. (Munday et. al., June 2018). GVA per head is significantly below the Welsh average in parts of the West Wales and the South Wales Valleys. As stated above, it should be noted that GVA makes no allowance for resources used up in the production of the value of the goods and services it calculates (IPPR North Commission on Economic Justice, 2018).

The Gross Disposable Household Income (GDHI) per head in Wales in 2016 was £15,835 or 81.5 percent of the UK average. GDHI is the amount of money that all of the individuals in the household have available for spending after taxes and social contributions have taken effect. Wales saw the third lowest percentage increase in GDHI per head of the UK countries and English regions between 1999 and 2016, up 58.8 percent compared with a 67.4 percent increase across the UK. West Wales and the Valleys saw an increase of 58 percent in GDHI per head since 1999, while East Wales saw a 59.7 percent increase, both below the increase for the UK as a whole (up 67.4 percent). As with other economic indicators, the UK average GDHI is driven heavily by London and the South East. (ONS Regional Gross Disposable Household Income, 1997 to 2016)

Gross Average Full-Time Weekly Earnings is the standard measure to compare earnings from work. It considers earnings before deductions and includes people working more than 30 hours per week (or 25 hours per week for those in teaching professions). In April 2017, Wales had the lowest average weekly earnings amongst the four UK countries and English regions at £498 (London was £693) (IPPR North, 2018). Since devolution, average weekly earnings in Wales have been around 90 percent of the UK average, with the largest gap between Wales and the UK in 2008 (ONS Annual Survey of Hours and Earnings, 2017).

The number of workforce jobs in Wales increased by 26.7 percent (326,000) between March 1999 and March 2018. Over the same period the number of workforce jobs across the UK as a whole increased by 20.3 percent (Welsh Government Key Economic Statistics, August 2018).

Over the five years leading to quarter 4 of 2015, employment in the private sector in Wales increased by 11.4 percent, while employment in the public sector decreased by 10 percent (NAfW Research Service Labour Market Briefing, 2016). Nevertheless, public sector employment as a percentage of total employment in Wales in 2016 was 22.4 percent (IPPR North, 2018).

In 2017 there were 250,100 active businesses in Wales, with a combined annual turnover of £117bn. 95 percent of all business in Wales are micro-businesses employing nine people or fewer. Large businesses account for 0.7 percent of the total and employ 38 percent of the workforce. Over 95 percent of Wales' 252,000 SMEs are in the micro firm category. Medium sized enterprises, those employing between 51-249, represent less than one percent of SMEs in Wales. (Munday et. al., June 2018)

Despite its large SME base, much of the focus of Welsh economic policy has been on seeking to attract large foreign investments into Wales. Economic policy in Wales following the publication of the Haywood Report (Welsh Government, 2012) has been entirely consistent with the broader UK context. The logic of internationally competitive city regions, including an emphasis on securing FDI through international competition, is accompanied by the targeting of 'key sectors', and a series of new Enterprise Zones. Several City /Growth Deals have been, or are in the process of being, established, including the Swansea City Deal.

4.0 Methodology

4.1 Selecting the Place

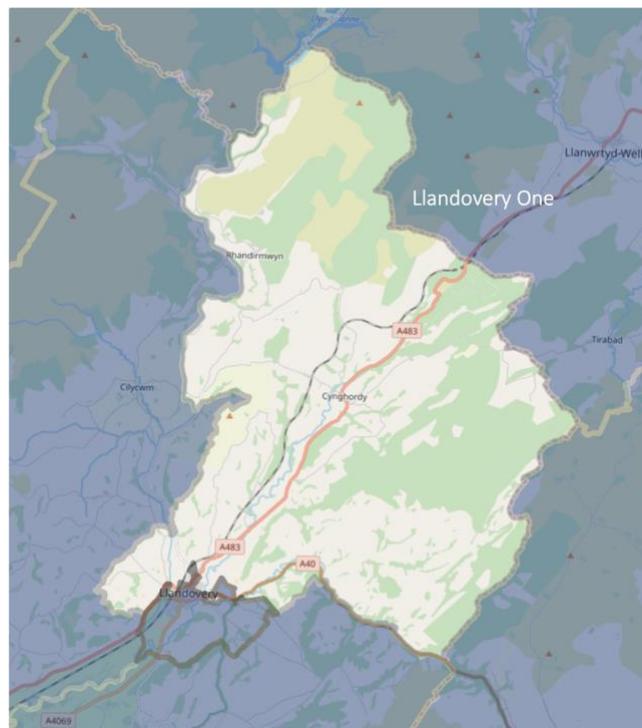
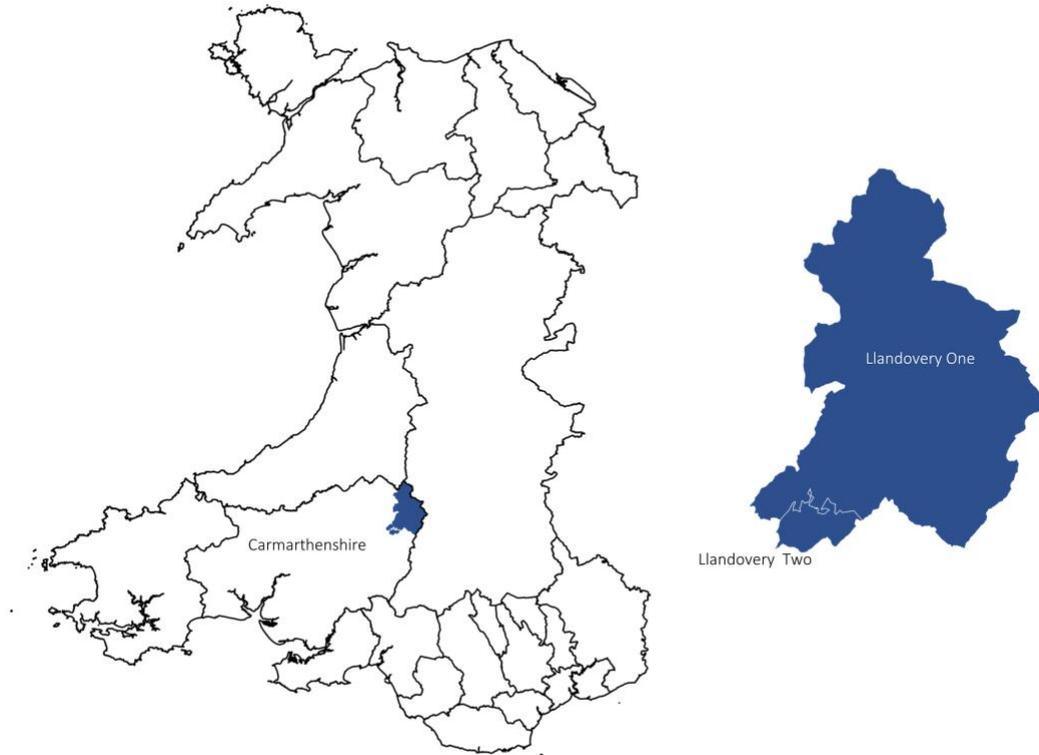
The central assumption of the Deep Place approach is that every place is different. Commonalities clearly exist between places of similar character, but each community has its own unique range of assets, challenges and opportunities. The Deep Place approach is based on an empirical case study undertaken at a spatial level where each community can be more clearly understood. The three previous UK-based Deep Place studies have taken place within an urban, post-industrial environment. Llandovery is a small market town, and it is the first opportunity to apply the approach within a rural community.

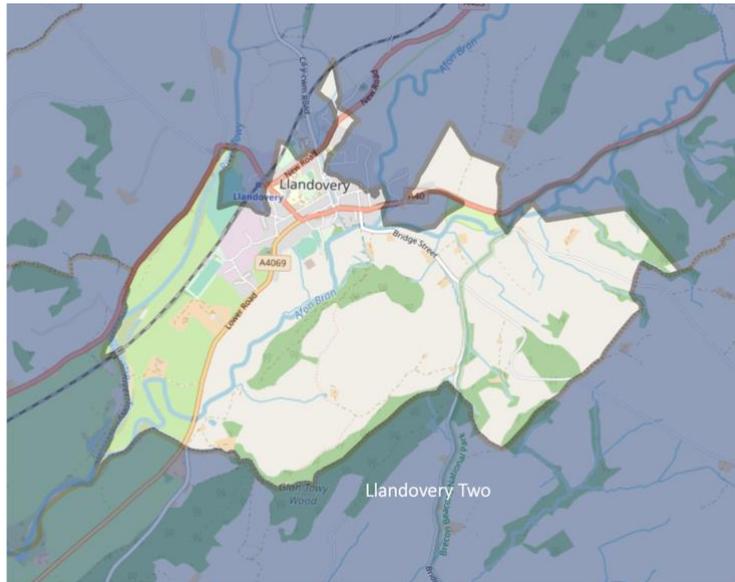
There has been a surprising lack of research into small market towns, given that rural communities across the UK are facing multiple challenges (Skerratt, 2018) this is a significant shortcoming. Woods (2011) suggested that 'small market towns have occupied a liminal space in both policy and academic research, and have been the study of limited direct targeted study'. Based on work undertaken at the Wales Rural Observatory, they sought to provide an overview of the plight of rural communities. They suggested that population growth in rural towns in Wales has been greatest in those located either next to the English border, or those with expanding administrative or educational institutions. Conversely, population decline has been experienced in towns on the western periphery of Wales, or those with a contracting industrial base.

Llandovery in Carmarthenshire was selected as an appropriate rural community to further test and refine the Deep Place methodology, as well as contributing to the broader lack of evidence

concerning small market towns and rural communities. Llandovery consists of two LSOA, and, although broader contextual issues have been considered, these have been used as the primary focus for data collection in this study. These LSOA are: Llandovery One, which includes the northern part of the town and rural areas to the north and east, and Llandovery Two, which includes the southern part of the town and the rural areas to the south and west.

Lower Super Output Areas: Llandovery One and Llandovery Two





Using these two LSOA, the table below provides a succinct overview of the degree of relative deprivation and affluence in Llandoverly based on the Welsh Index of Multiple Deprivation (WIMD) (2014). Generally, Llandoverly One is comparatively more disadvantaged than Llandoverly Two. It rates particularly poorly in the Access to Services Domain and is amongst the most deprived areas in Wales, and may be a result of the larger and more dispersed rural geography of the LSOA. Overall, Llandoverly One is amongst the 30-50 percent most deprived LSOAs in Wales, whilst Llandoverly Two is among the most affluent LSOAs in Wales. Again, this may reflect the more dispersed rural characteristics of Llandoverly One.

Welsh Index of Multiple Deprivation 2014									
LSOA	WIMD	Income	Employment	Health	Education	Access to Services	Community Safety	Physical Environment	Housing
Llandoverly 1	756	884	992	825	1069	81	1597	780	516
Llandoverly 2	1243	1078	1139	1055	1043	1524	1492	554	576

WIMD 1-1909	1-191: 10% Most Deprived	192-382: 10%-20% Most Deprived	383-573: 20%-30% Most Deprived	574-955: 30%-50% Most Deprived
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4.2 The Local Population

Llandoverly is located in rural Carmarthenshire, around 30 miles north-east of Carmarthen on the edge of the Brecon Beacons National Park and is one of the county’s market towns. The town traces its earliest history as a settlement to a Roman fort built near the town, but the modern settlement emerged more directly following the building of the Norman Llandoverly Castle. Llandoverly’s role as a drovers’ town, located at the intersection of three historically significant droving routes, cemented not only its strong links to the agricultural community, but also its provision of facilities as a market town. Llandoverly also saw the establishment of the Black Ox Bank, which was initially developed to provide banking facilities for drovers.

Covering a land area of 115.80km², Llandoverly has a population of around 2,600 people, and a population density of 22 people per km². The population change between 2011-17 was a reduction of 124 (4.6 percent) (Policy Research and Information Section, Carmarthenshire County Council, January 2019). The table below illustrates that the local population is generally

older than the Wales average. This is significantly more noticeable in Llandoverly One, where there are around five percent fewer children, and 13 percent more people over the age of 65 than the Wales and Carmarthenshire averages. Llandoverly Two is more consistent with the Welsh and Carmarthenshire averages in all age groups. Carmarthenshire has an aging population, and on current trajectories by 2039 one in three residents will be aged 65 and older (Carmarthenshire Well-being Plan, 2018).

Population					
LSOA Name	All Ages	% 0-15	% 16-64	% 65+	% 3-19
Llandoverly 1	1422	13.1	53.5	33.4	14 (206)
Llandoverly 2	1168	16.4	61.9	21.7	17 (204)
Carmarthenshire		17.7	59.3	23	
Wales		17.9	61.7	20.4	

Source: ONS Small Area Population Estimates (LSOA) 30 June 2017

As the table below shows, at the time of the last Census Llandoverly had just 78 lone parent households, and the overwhelming majority of these were working female lone parents.

Lone-parent Households with Dependent Children					
LSOA	Total Lone Parents	Female Lone Parent	Male Lone Parent	Female Lone Parent: Not in Employment	Male Lone Parent Not in Employment
Llandoverly 1	36	31	5	11	1
Llandoverly 2	42	42	0	9	0
Carmarthenshire	5939	5211	728	5211	241
Wales	97524	87392	10132	36874	3615

Source: Census 2011

The tables below demonstrate that Llandoverly has a fairly settled community. At the time of the last census just five percent of the population of Llandoverly was born outside of the UK, and around 65 percent were born in Wales. The data also shows that at the time of the last Census Llandoverly was also almost wholly ethnically white.

Country of Birth										
LSOA	Total	Europe	United Kingdom	Wales	Other EU Countries	Europe Non-EU	Africa	Middle East and Asia	The Americas and the Caribbean	Antarctica and Oceania
Llandoverly 1	1421	1392	1361	886	27	1	4	8	16	1
Llandoverly 2	1268	1231	1191	859	34	2	3	29	4	1
Carmarthenshire	183777	180733	176192	139693	3636	186	662	1696	472	214
Wales	3063456	2969037	2895585	2226005	55360	4519	22006	57929	10310	4173

Source: Census 2011

Ethnic Group									
LSOA	White: English, Welsh, Scottish, Northern Irish, British	White: Irish	White: Gypsy or Irish Traveller	White: Other White	Mixed: White and Black Caribbean	Mixed: White and Black African	Mixed: White and Asian	Mixed: Other	Asian/Asian British:
Llandoverly 1	1357	5	2	29	7	4	6	2	2
Llandoverly 2	1178	4	2	42	0	0	3	6	9
LSOA	Asian/Asian British: Pakistani	Asian/Asian British: Bangladeshi	Asian/Asian British: Chinese	Asian/Asian British: Other Asian	Black/African/Caribbean/Black British: African	Black/African/Caribbean/Black British:	Black/African/Caribbean/Black British: Other Black	Other ethnic group: Arab	Other
Llandoverly 1	0	0	1	3	1	1	0	0	1
Llandoverly 2	1	2	19	1	1	0	0	0	0

Source: Census 2011

The Welsh language plays an active and important role in the cultural characteristics of Llandovery and is used as a working language by people and businesses in the community. For many people Welsh is spoken as a first language, and at the time of the last census around half of the population of the town had some Welsh language skills, well above the Welsh average.

Welsh Language Skills (Aged 3+)					
LSOA	Total	No skills in Welsh	Can speak Welsh	Can speak & read but not write Welsh	Can speak; read & write Welsh
Llandovery 1	1421	689	95	48	396
Llandovery 2	1268	546	78	44	394
<i>Carmarthenshire</i>	183777	78745	12645	7465	58432
<i>Wales</i>	3063456	2263975	568500	45767	431759

Source: Census 2011

The Carmarthenshire Well-being Plan (2018) states: ‘With nearly half of the population of Carmarthenshire speaking Welsh we must ensure that the design and delivery of the numerous activities and actions in this plan embrace Welsh language and culture, and the vision for one million Welsh speakers by 2050’. In 2014, Carmarthenshire County Council prepared their *The Welsh Language in Carmarthenshire* report, which built a strong case for safeguarding the language for future generations and it offered a series of recommendations. In 2019, Welsh Government announced the creation of an Arfor pilot, which aims to support the economy and communities in areas with a high percentage of Welsh speakers. The recent decision to locate the 2021 Urdd Eisteddfod in Llandovery represents a major opportunity to not only celebrate the Welsh language in the town, but has the potential to add direct economic value to local businesses.

4.3 Research Methods

The Deep Place approach aims to develop a complete understanding of a single location. It seeks to identify all the current weaknesses that constrain the community, as well as opportunities and assets that might be better realised to support a sustainable future. In part, Deep Place is concerned with how best to use the design and delivery of public services as a mechanism for positive change. This is consistent with the Total Place (LCLG 2010). Deep Place is, however, concerned with more than just public service delivery, important though these issues are. Deep Place seeks to enrich the creative interrelationship between public, private and third sectors and the local community. This, it contends, is critical to sustainable place-making.

The research methods adopted in this study have sought to be inclusive of the wide variety of agencies and organisations involved in the various policy areas impacting on Llandovery. There has also been an attempt to ensure community participation in the study. The research methods have been both desk-based quantitative, and ethnographic qualitative. Deep Place is action-based research, which seeks to influence policy and delivery. This study aims to be a catalyst for positive change, and there has been an attempt to involve many of those who would be critical to implement the transition approach advocated in this report.

The study has used official data, such as the WIMD, Census and Public Health Wales, to build a statistical profile of the two LSOA that make up the study area. It was critical, however, to go beyond this quantitative data to establish an understanding of the ‘lived experience’ in Llandovery. Upon establishing an understanding of the linkages between the social, economic and environmental dimensions of the community, the study sought to focus on how existing assets could be better utilized to make positive contributions to the community. There was also an element of ‘horizon scanning’ to identify current trajectories and to ascertain potential developments in the local economy.

A central element of the approach has been the use of the following five ‘Think Spaces’ to better understand the challenges facing Llandovery, to ‘borrow’ expertise in various policy professionals, and to gain an essential insight into ‘lived experience’ of community life in Llandovery.

- Education and Skills Think Space, 19th November 2018
- Health and Social Services Think Space, 19th November 2018
- Environment and Energy Think Space, 20th November 2018
- Economy, Transport and Connectivity Think Space, 20th November 2018
- Community Think Space, 19th February 2019

These Think Spaces were essentially policy-themed semi-structured focus groups of policy experts, practitioners and community members. Co-productive in nature, the Think Spaces have influenced the writing of this report and acted as an important ‘reality check’. The Think Spaces were bilingual, with simultaneous translation provided by Carmarthenshire Council, and each was hosted by Llandovery Rugby Club.

In addition, there were repeated opportunities to discuss this research with members and officers from Carmarthenshire Council and other public services, as well as other non-public sectors stakeholders. These were not formal interviews, and are not directly referenced in this Report, but like the Think Space discussions they contributed to the scoping and check and challenge process. These discussions, like the Think Spaces, were undertaken under Chatham House Rules.

5.0 The Local Economy

The economies of rural areas tend to be even more dependent on smaller businesses than urban areas. The Federation of Small Businesses (2015), suggested that many of the problems faced by small businesses in rural areas are similar to those faced on a daily basis by those in urban ones. Geographical isolation, however, means that some of problems are further exacerbated. The economy in many rural areas tends to be characterised by low wages and low economic activity. Kitchen (2011) suggested that there is an economic paradox: rural Wales possesses significant areas of high environmental value, but the problems of low skills and low economic activity are most prominent in those areas with the most eco-economic potential. To resolve this, they suggested, there needs to be a better link between environmental value and economic value added.

5.1 Carmarthenshire's Economic Approach

Carmarthenshire's Well-being Plan (2018) focuses on four objectives: Healthy Habits, Early Intervention, Strong Connections, and Prosperous People and Places. The Prosperous People and Places objective states that the educational curriculum, as well as other support and training, needs to better support the employment needs, expectations and trends for Carmarthenshire. It also aims to improve Carmarthenshire's transport and digital infrastructure. The Swansea City Deal is part of the UK Government's growth focused programme, and it seeks to secure £1.3bn 'investment' from public and private sources over a 15-year period. The City Deal is designed to 'attract international investor interest' (Carmarthenshire Well-being Plan, 2018).

Carmarthenshire County Council's *Strategic Regeneration Plan for Carmarthenshire 2015-2030* lists a number of economic priorities, these are: tourism, hospitality and leisure; infrastructure and transport; and business and skills (which recognises the importance of self-employment and SMEs, and the rural economy in Carmarthenshire). In respect to the rural economy, which is most relevant for this study, the Strategy has a number of objectives.

To support business growth, retention and specialisation:

- Providing tailored business advice and support for retention and growth
- Increasing job opportunities by supporting employment growth within indigenous businesses
- Enhancing the resilience of indigenous employers
- Increasing the productivity, diversity and efficiency of farming and forestry businesses
- Developing a more entrepreneurial culture

To support a skilled and ambitious workforce

- Improving attainment and ambition
- Ensuring education provision is aligned to and shaped by employer needs

To seek to maximise job creation and employment prospects

- Supporting the economically inactive back into work
- Promoting and facilitating local enterprise development

To support the development of a knowledge economy

- Supporting and encouraging greater take up and application of new technologies amongst SMEs
- Strengthening links between SMEs and research facilities

To develop the distinctiveness and attractiveness of the area in terms of tourism, business investment and addressing rural poverty

- Developing and implementing a programme of investment capable of engaging visitors and investors to the area
- Targeted development of land, property and infrastructure

- Maximise the opportunities available from the Next Generation Broadband infrastructure
- Supporting and developing the use of the Welsh language
- Ensuring access to services within rural areas by developing new approaches to service delivery and supporting social enterprise development

Following the publication of this Strategy, Carmarthenshire County Council has now established a cross-party working group on rural regeneration, which is working toward developing a strategy for the ten market towns of Carmarthenshire. It is hoped that this study may provide some useful contextual thinking for this process.

5.2 Llandovery's Economy

The table below identifies that the largest sectors within which the population of Llandovery are employed are: construction; wholesale and retail trade, repair of motor vehicles and motor cycles; education; human health and social work; and, particularly in Llandovery One, agriculture, forestry and fishing.

Percentage Employment by Industry									
	Agriculture, forestry and fishing	Mining and quarrying	Manufacturing	Electricity, gas, steam and air conditioning supply	Water supply; sewerage, waste management and remediation activities	Construction	Wholesale and retail trade; repair of motor vehicles and motor cycles	Transport and storage	Accommodation and food service activities
Llandovery 1	12.5	0.7	6.7	0	0.2	13.3	12.7	2.4	6
Llandovery 2	4.5	0	8	0.3	0.3	11.8	15.9	4.4	9.2
Carmarthenshire	4.1	0.3	8.7	0.5	0.9	9	16.6	3.8	5.3
Wales	1.7	0.2	10.5	0.8	0.9	8.2	15.6	3.9	6.2
	Information and communication	Financial and insurance activities	Real estate activities	Professional, scientific and technical activities	Administrative and support service activities	Public administration and defence; compulsory social security	Education	Human health and social work activities	Other
Llandovery 1	1.5	1.3	1.1	3.3	3.1	6	12.9	13.6	2.7
Llandovery 2	0.5	1.2	1	2.4	2.8	4.9	13.2	14.8	4.5
Carmarthenshire	1.7	1.9	1.1	3.6	3.3	9.1	10.5	15.5	4.2
Wales	2.3	3.1	1.3	4.3	4	7.7	10.1	14.5	4.5

Source: Census 2011

The table below identifies the number of civil service jobs as a percentage of all employee jobs in Carmarthenshire. Although this data is not available at LSOA or Ward level, it does indicate that the county as a whole has a lower proportion of civil service jobs than the Wales or GB averages. Nearly 80 percent of civil service jobs in Carmarthenshire are full-time, and over 60 percent are held by women (ONS, 2018).

% Civil Service Jobs as a Proportion of Employee Jobs 2018	
Carmarthenshire	0.9
Wales	2.7
GB	1.5

Source: ONS Annual Civil Service Employment Survey

The table below identifies the number of businesses in Wales and Carmarthenshire that are micro, small, medium and large. Although the data is not available at LSOA or Ward level, it clearly demonstrates that the private sector economy of Carmarthenshire is overwhelmingly

one that is based on micro and small businesses. There are only 85 businesses in Carmarthenshire that employ more than 50 people, and of these just 20 businesses employ more than 250 people (ONS, 2017).

UK Business Counts (2017)				
	% Carmarthenshire	No. Carmarthenshire	% Wales	No. Wales
Micro (0-9)	91.4	7055	89.2	91470
Small (10-49)	7.4	575	9.2	9430
Medium (50-249)	0.8	65	1.3	1375
Large (250+)	0.3	20	0.3	305

Source: ONS Interdepartmental Business Register

Self-employment also accounts for a substantial amount of economic activity in Llandoverly. In 2011, the self-employment rate in Llandoverly Ward was 15.9 percent (20.2 percent of males and 11.5 percent of females) (Census, 2011). This is likely to have increased since 2011, as between 2007 and 2016 self-employment across the UK grew from 3.6m to 4.33m, and accounted for 44 percent of total jobs growth. During the same period, self-employment in Wales increased from 161k to 176k, which represented 38 percent of total jobs growth. (Henley and Lang, 2017) Place-based factors can have a significant impact on the pattern and experience of self-employment. The factors include existing and historical local entrepreneurial cultures. The size of the existing self-employment base can be a strong indicator of likely future growth, as it can be indicative of an entrepreneurial culture, stronger business networks, and communities that are more supportive of the self-employed. (Goetz and Rupasingha, 2014)

Henley and Lang (2017) suggested that it is possible to identify three local authority types in Wales, including 'rural', 'urban and urban periphery' and 'Valleys and deprived urban', which mostly divide into self-employment rates around 10 percent, between 10-20 percent and under 10 percent respectively. Carmarthenshire falls within the rural category. Henley and Lang argue, that although it might be tempting to conclude that high rural self-employment is because of the preponderance of farmers or agricultural businesses, this is not necessarily the case. They state, 'even when stripping out the primary sector from data, this only reduces the self-employment rate overall for the rural grouping from 18.4 to 16.3 percent, which is still well above the other areas of Wales'.

The data suggests that self-employment rates tend to increase with age across the whole of Wales, but this is a particularly notable trend in rural areas. Over half of self-employed in rural Wales are home-based, and Henley and Lang (2017) suggest, 'for the home-based self-employed in rural areas, policy responses may need to address the lack of appropriate business premises, as well as issues relating to the lack of access to, and ability to capitalise on, high speed broadband services'.

Carmarthenshire County Council's Business Rates Data (2019) identifies 184 properties that are assessed for Non-domestic Rates (Business Rates) in Llandoverly. The tables below identify the usage categories for each of these properties, as well as the number of properties that fall within certain value ranges. The largest individual categories are shop/retail, storage/warehousing, automotive and office. Collectively, hospitality and retail related activities appear to represent by far the largest property uses.

Non-domestic Rates (Usage Category) - Llandovery Ward	
Usage Category	Number
Shop/Retail	58
Storage/Warehousing	31
Automobile Retailed	17
Office	14
Pubs/Inns (Some with rooms and food offer)	8
Hotel/B&B/Self-Catering/Hostel/Caravan and Camping	7
Café/Restaurant	5
Services	5
Workshops	4
Banks (All but one are now vacant, that is closing soon)	4
Factory	3
Others	28

Source: Carmarthenshire County Council, 2019

The data also shows that the ratable values for each of these properties is very low, with just four with a ratable value above £50,000. It should be noted that this data does not necessarily mean that each of these properties is currently occupied or in use.

Non-domestic Rates - Llandovery Ward	
Ratable Vale Range	Number of Properties
£0 and £4,999	101
£5,000-£9,999	47
£10,000-£19,999	18
£20,000-£49,999	14
£50,000 +	4

Source: Carmarthenshire County Council, 2019

5.3 The Town Centre

The fate of UK town centres has become increasingly in vogue as a research and policy topic since the 2008 Financial Crisis. In 2011, the Portas Review commissioned by the UK Government successfully raised the profile of the fate of UK town centres to a broad audience, but, it failed to sufficiently address more systemic and contextual problems. In Wales, the National Assembly for Wales' Enterprise in Business Committee 2012 Review of High Streets, was itself prompted by the Portas Review to consider what support was needed for Welsh high streets. It was a fairly comprehensive report, which considered many of the individual challenges facing Welsh high streets, but, like Portas, did not really get to grips with the wider functions of town centres and the economic context within which they exist. Despite this growing interest, the research and policy response specifically targeted on smaller rural market towns has been more limited.

Grimsey's 2012 independent review called for a far more radical rethink about the future of our towns, arguing that simply tinkering with retail will not address the major challenges. On a more fundamental level, the challenges facing the future of towns are symptomatic of the wider problems facing society, including the substantial rise of income and wealth inequality. Disposable income clearly has a central impact on the commercial viability of any town and often acts as a catalyst for decline. During the 1970's, when high streets were booming, income inequality was at its lowest (Picketty, 2014). Today, as discussed above, wealth and income inequality are at their highest ever levels.

The table below shows the household income levels for the two Llandovery LSOAs, which form the immediate catchment population for the town. The data shows that the resident population has lower median gross household income levels than either the Carmarthenshire or Welsh averages. It also shows that the percentage of households with income below 60 percent of the UK average is around 39 percent. This places the Llandovery poverty rate at about six percent above the Welsh average.

Gross Household Income				
	Total Households	Median Income	No. Households Below 60% Median UK Income	% Households Below 60% Median UK Income
Llandovery 1	631	£23,444	251	39.8
Llandovery 2	525	£23,273	205	39
Llandovery Ward	1,156	£23,362	456	39.4
Carmarthenshire		£25,488		35.5
Wales		£26,931		33.6

Source: CACI Paycheck, 2018

Background to Decline

The decline of town centres ironically has its origins in the rise of mass consumerism during the 1950s and 1960s. High streets and town centres fulfilled this growing consumerism over the last 50 years by reducing town centre residential dwellings to make way for increased retail space, developing shopping malls, and shifting the core function of town centres toward an almost entirely retail focused function. The vibrant mix of functions town centres like Llandovery had historically performed was therefore removed. More recently, however, retail is increasingly being delivered online, and as result some high streets have a substantial oversupply of retail space. UK online sales passed the £100bn level for the first time in 2014, seeing a 13 percent growth on 2013 (IMRG, 2015).

Across the UK, around eight percent of shops have closed since 2013, and the largest declines have been in clothing retailers. Other significant declines have been hobby and sport equipment retailers, phone stores, gifts and cards, books and maps, restaurants, footwear and charity shops. Although there have been closures in rural areas, pubs and bars have seen significant increases in cities. Other increases include: hair and beauty, convenience stores, takeaways, cafes, bookmakers, tattoo parlours and bakers. (Guardian, 30.1.19) There was a general fall in high street footfall across the UK of 3.8 percent in November 2018, which was the twelfth consecutive month of falls (Millington et. al., 2018). During 2018, an average of 14 shops closed every day across the UK. This included a record number of independent shop closures, with a net decline of 1,554 independent retailers in the first half of 2018, compared with 762 in the previous year. (Goldfindle, 2019)

Welsh towns are performing poorly even against UK standards. This is especially true if measured in GVA growth, with 84 percent of towns in Wales expected to see low growth in the period up to 2020 (Experian, 2012). Although Welsh towns have experienced the decline of traditional retail outlets as seen in the rest of the UK, they have not seen the positive corresponding shift (as seen elsewhere) to other forms of retail, and vacancy rates have consequently been higher, particularly in town centres (Welsh Retail Consortium, 2016). Even

amongst those retailers where growth has been recorded in recent years, Wales has the second lowest increase (after Northern Ireland) of convenience stores, the second lowest percentage increase in cafes (after Northern Ireland), the lowest percentage increase in charity shops, and third lowest increase of betting shops (ACTM, 2014). Data provided by Carmarthenshire Council for this study shows there are currently 28 vacant commercial properties in Llandovery, with all but one being vacant for over one year, 24 vacant for over two years, and 18 vacant for over three years.

A large part of the growing disparity between Wales and the rest of the UK, is explained by the location of dominant consumer patterns. As shown in the table below, Experian has split emerging consumer demographics into seven key groups. Wales' dominant consumer groups in town centre catchments are facing financial hardship. The more significant decline of Welsh high streets, compared with those in more affluent parts of the UK, could be attributed to the lower levels of disposable income in Wales.

Consumer Type	% Within Town Centre Catchments
Top Table (affluent couples and families)	Wales lowest
Urban Pulse (cosmopolitan city dwellers)	Wales lowest
Juggling Parents (higher income families)	Wales lowest
Family Value (mid to lower income families - the squeezed middle)	Wales highest
Daily Challenges (hard pressed singles and families - the squeezed bottom)	Wales 8th highest
Retiring in Style (affluent older singles and couples)	Wales 2nd highest
Tough Vintage (struggling older singles and couples)	Wales 2nd highest

Source: Experian 2012

Although this data is not available specifically for Llandovery, the tables below based on Census data show the socio-economic classification for the resident population in 2011, which is likely to have some degree of correlation with the consumer types identified above.

Socio-economic Classification Aged 16-74					
LSOA	All usual residents aged 16 to 74	Higher managerial; administrative and professional occupations	Lower managerial; administrative and professional occupations	Intermediate occupations	Small employers and own account workers
Llandovery 1	1006	76	198	81	193
Llandovery 2	910	38	182	63	144
Carmarthenshire	132930	9108	26462	15416	16708
Wales	2245166	174943	439351	268396	210168

Source: Census 2011

Socio-economic Classification Aged 16-74					
LSOA	Lower supervisory and technical occupations	Semi-routine occupations	Routine occupations	Never worked and long-term unemployed	Not classified
Llandovery 1	74	137	101	54	92
Llandovery 2	83	172	114	33	81
Carmarthenshire	10152	22210	17291	6522	9061
Wales	181067	358656	287433	121588	203564

Source: Census 2011

A Carmarthenshire Retail Study undertaken in 2015 (Nathaniel Litchfield and Partners, 2015), identified that Llandeilo and Llandovery had lost their share of the local food retailing market since 2008 (down from 50 to 44 percent), and consequently they are now less self-sufficient in food retailing. Based on a household survey, the table below shows the main locations for household main grocery shopping in the area of Carmarthenshire labeled 'Zone Six' (consisting of Llandeilo, Llandovery and rural north east Carmarthenshire). None of these locations are independent retailers and just one, a branch of the Co-op, is located in Llandovery.

Location of Household Main Grocery Shopping	
Shop	Percentage
Aldi, Crosshands	19.6
Co-op, Llandovery	17.4
Co-op, Llandeilo	11.1
Tesco Extra, Carmarthen	9.6
Internet/Home Delivery	9.5
Co-op, Lampeter	5.2
Aldi, Carmarthen	4.1
Sainsbury's, Lampeter	3.3
Lidl, Carmarthen	3.2
Morrisons, Carmarthen	3.1
Tesco, Ammanford	2.7

Source: Nathaniel Litchfield and Partners, 2015

The survey also identified that 6.2 percent of households undertook 'top-up basket shopping' for groceries in Llandovery's independent shops, whilst 9.6 percent said they did so in Co-op, Llandovery. 48.2 percent said they did not do 'top-up' food shopping. The average spend on top-up shopping was £18.19 per week. It should be noted, however, although the Co-op in Llandovery is one of the top shopping destinations for households in this part of Carmarthenshire, it is located on the edge of the town, with its own car park, some ten minutes' walk from the centre of Llandovery and its retail core. This may limit the degree to which it adds to footfall in the centre of Llandovery.

The FSB (2017) suggested that access to banking and financial inclusion are two basic requirements of any functioning economy, but that Wales has been particularly affected by bank branch closures. Over 600 bank branches closed in Britain between April 2015 and April 2016. Five of the top ten counties experiencing bank closures are in Wales – Powys, Denbighshire, Gwynedd, Conwy, and Carmarthenshire. Llandovery has also been particularly badly affected by the trend for bank branch closures in recent years, and its last remaining bank closed this year. The recently reopened Llandovery Post Office is now the only banking facility in the town.

Potential Actions

The future resilience and continuing function of towns in Wales will require a more considered and holistic policy response than has generally been the case. This response must encompass the wider economic context, the future location of public services, growing local enterprises, the role of the social sector and communities, as well as retail. Although there are specific actions that cross sector partners can make to help support towns, underpinning these needs to be a new strategic vision for town centres that revolves around it being a centre for business,

services and the community – serving the civic life of the wider town. Town centres need to be designed as the heart of each community and, as such, their future success will depend on the local community’s continued relationship with them. Local communities and businesses should be given opportunities to fully and actively engage in planning their town’s future.

There has been a long-term trend to remove civic functions from town centres. In removing public services from town centres however, the menu of town centre functions has been depleted and local economies have been significantly impacted as a result. Weaker local economies and consequential increases in poverty, ironically lead to higher demands on public services.

Carmarthenshire County Council Owned Facilities in Llandovery

Llandovery Livestock Mart	Mart
Llandovery Library	Library
Llandovery Castle Fields Public Toilets	Public Convenience (Danfo)
Gilfach Land, Llandovery	Bare Land Holding
Llanfair, Llandovery	Bare Land Holding
Llandovery Castle Car Park	Car Park
Ysgol Rhys Pritchard, Llandovery	School - CP
Ysgol Gyfun Pantycelyn, Llandovery, (Closed)	Closed School
Llandovery Industrial Estate Land	Surplus Property
Llandovery Craft Centre	Industrial Estate
Sugar Loaf Mountain Picnic Site	Picnic Site
Llandovery Swimming Pool	Leisure/Sports Centre
Llandovery Highways Depot	Depot
Llandovery Cottage Hospital, Base Office	Admin Building/Office
Llandovery Castle Grounds	Recreational Land
Llandovery Station Car Park	Car Park
Broad Street Land, Llandovery	

Source: Policy Research and Information Section, Carmarthenshire County Council, April 2019

Despite the recent closure of Llandovery’s secondary school, which was highlighted as having a negative impact on footfall in the town during this study, the town retains a core of public services. Despite the unprecedented financial pressures on public services over recent years, efforts must be made to safeguard the continuing presence of these services.

Property

In 2013 Arup was commissioned by Carmarthenshire County Council to undertake a series of physical studies of Llandovery, these consisted of: a Town Centre Public Realm Master Plan; a Llandovery Shopfront Design Guide; a Llandovery Town Improvement Grant Scheme: Building Audit; a Llandovery Signage Audit; and a Town Gateways and Tree Planting Strategy. There is much to commend in these studies, and certainly the implication of certain key elements would make noticeable improvements to the physical appearance of Llandovery and, to some extent, the functionality of the town centre. The principles of a tree planting strategy are particularly welcomed, as they also offer wider environmental benefits, as are those recommendations that would have a pedestrian road safety improvement in the town centre.

If implemented in full such interventions would, however, require significant investment that may be beyond the scope of current resources. In any case, this study argues that physical characteristics, important though they can be, are only part of the much wider understanding of sustainable place-making. Such interventions are probably best incrementally delivered as a consequence of addressing the broader issues, such as the lack of business facilities or affordable housing. A number of significant buildings previously used by banks are now vacant in Llandovery, and consideration should be given to potential future uses for these buildings.

As indicated above, there has also been a long-term trend of shifting residential accommodation away from town centre locations, and this has led to town centre depopulation, reducing street activity and the associated natural surveillance. In order to overcome this, some Welsh towns are already seeking to residentialise parts of their high street. It is critical that this re-residentialisation process provides accommodation for a mix of household incomes, including those with a higher disposable income, so as to help ensure the viability of the town centre. Housing will be discussed in greater detail below, but one future use for surplus and vacant town centre space may be targeted residentialisation.

Retail, as discussed above, only represents a part of what a town centre needs to offer. The availability of affordable office accommodation for other types of local businesses is also important. This will provide increased footfall for the town centre, as well as help to strengthen the economic base for the town by providing facilities to support local enterprise. The NAFW Enterprise and Business Committee's 2012 Review of High Streets recommended that more needed to be done to encourage town centre office development to increase footfall during the working week, and move away from the increasing trend to develop out of town office developments. There are very few facilities for new or small businesses in Llandovery, despite a high proportion of self-employed residents.

Business rates are a major cost to small businesses in Welsh town centres, particularly where their trading performance is weak. If rates were reformed, business, particularly small businesses, could be encouraged. There is often a perverse effect of the implementation of business rates relief that can damage the viability of some town centres. The NAFW Enterprise and Business Committee (2012) argued that business rates should be calculated on basis of profits rather than rateable value. The rate relief to charity shops, laudable though it might seem, may actually be damaging the retail mix of some Welsh town centres. Other quasi-retail outlets such as amusement arcades and betting shops also have more favourable rates arrangements, which can have similar effects on the overall mix of town centres.

Tourism

Tourists spend around £14m a day whilst in Wales, or £5.1bn a year, with particular importance to local economies in places like Wales' National Parks (FSB, 2018). Located immediately adjacent to the Brecon Beacons National Park, Llandovery would seem to be well located to improve its share of this economic benefit. Tourism has been calculated to contribute £370m to the annual economy of Carmarthenshire (Carmarthenshire Well-being Plan, 2018).

STEAM (Scarborough Tourism Economic Activity Monitor) is a methodology for quantifying the local economic impact of tourism, from both stay and day visitors. It has not been possible to

calculate the average economic impact of each tourist in Llandoverly, but Brecon Beacons National Park Authority using the STEAM methodology calculates, for example, that on average the impact of tourist day visitors on the local economy of Brecon is £31.60 per person. This is likely to be significantly higher for overnight visitors.

A large proportion of tourism in Wales comprises day visits from visitors living elsewhere in the UK, there are approximately 10 million trips to Wales by residents from elsewhere in Great Britain. The FSB has argued that increasing the length of these visits should be a key policy objective, and the Welsh Government's economic action plan *Prosperity for All* makes such a commitment (FSB, 2018). Llandoverly is a town that tourists already use as a base for overnight visits to the region, but if it is to compete more effectively for a larger share of this market, local businesses should be encouraged and supported to continually improve their visitor offer.

Governance and Leadership

Wales has tended to suffer from a lack of a strategic vision for town centres, which has led to an absence of a holistic policy response. This is particularly true for rural market towns. Instead, physical regeneration has been used, often without reference to local people or businesses, and it has generally failed to address the fundamental challenges facing Welsh towns. Short-termism and inconsistency in funding programmes has led to frustration amongst local authorities and other partners across Wales charged with implementing them. Local leadership is critical for the future success of town centres, and was one of the key recommendations to arise from the Portas Review. The NAFW Enterprise and Business Committee (2012) also recommended that every town should have a comprehensive plan in place, developed by a partnership of key stakeholders. These plans, rather than centrally determined government programmes, need to guide investment in town centres.

Business Improvement Districts have been established in some towns as a means to secure local leadership. Business Improvement Districts are business-led and business funded bodies, formed for up to five years to improve a defined commercial area. They are established following a ballot of all eligible businesses in an area, and funded by a levy on all eligible businesses. BIDs are not suitable for every location however, as businesses in weaker or smaller locations may not be able to afford the additional costs. There are alternatives to secure business involvement, and in some European countries, membership of local Chambers of Commerce and other local business bodies tends to be significantly higher.

6.0 Local Opportunities

In order to move toward a more socially, economically, environmentally and culturally sustainable community in Llandoverly over the next generation, this study advocates the progressive development of certain areas of the local economy. These areas include: food, energy and energy conservation, care, and environment; as well as a growth of e-commerce and distributed employment patterns.

6.1 Food

The production and supply of food must form a core part of any sustainable place-making agenda. Although representing a significant element of household expenditure, the survey data presented above shows how little of the average weekly household spend on groceries by residents of Llandovery is located outside of the major supermarkets. This is typical of the wider trend across the UK. This pattern of production and distribution has led to an increasing concern about food security and food quality.

The transition movement has identified food production as an example of the unsustainability of current economic processes. The issue of 'food miles' has entered public consciousness as a result of global supply chains. Although there are occasional middle-class consumer engaged (though rarely consumer-led) 'campaigns' that effect marginal changes, these never threaten the basic elements of the model. As a result, there has been a decline in local food production and distribution chains in favour of supermarket controlled global supply chains.

An alternative approach is emerging. Across the USA there has been a steady growth in the number of 'food hubs', which are now working to aggregate and distribute 'source-identified' food products. These are significant in the effort to develop local economies, tackle poverty, achieve environmental transition and contribute to the sustainable place-making agenda. Food hubs are also becoming fully commercially viable businesses, and are making it possible for smaller agricultural producers to access larger markets (Hardy et. al., 2016). The Cleveland 'Green City Growers' initiative is one of the best examples of a local food hub initiative.

Despite these initiatives, the kind of radical change needed to significantly affect the current model remains absent. Alongside the supermarket chains radically changing their current supply mechanisms, a more localised food economy will require a major shift in consumption patterns (Bowman et. al. 2012). As identified by Adamson and Lang (2014), it is difficult to see either of these happening at scale without government intervention and wider societal recognition of the need for change.

The future of agricultural policy in the UK following Brexit, which will result in the UK withdrawing from the Common Agricultural Policy, represents a major opportunity to review current UK food production and supply model. This review could, if undertaken with a renewed emphasis on the localisation of the food system, have a significant impact. Currently the majority of farming in and around Llandovery is upland, with 30 percent of produce exported - 95 percentage of this is exported within the EU. (Think Space Discussion). Nevertheless, any transition needs to be properly managed, with its impact on Welsh farming carefully considered. Welsh farms are generally more dependent on CAP payments than those in England (Messenger, 2018), reduced levels of public subsidy may undermine the viability of the farming sector in Wales.

6.2 Energy and Energy Efficiency

Transition thinking assumes that fossil fuel derived energy supply is unlikely to be a feasible basis for future fuel security. Indeed, the UK is already heavily dependent on the import of liquid gas for a significant proportion of its electricity generating capacity and domestic supply.

Concerns around energy security parallel concerns about rising fuel poverty. The UK Government has also effectively outsourced investment in energy infrastructure. State investment in green energy supply has historically been low, and it is falling even further.

Energy is a core element of the foundational economy, although it is one that is currently dominated by multi-national utility corporations and, as a consequence, is subject to a significant degree on international capital seeking maximum financial returns. Energy conservation and generation offer opportunities, however, to support the development of more sustainable local economies.

The Environment Wales Act (2016) contains three natural resources policy national priorities, reiterated in the Welsh Government *Draft Climate Change Adaption Delivery Plan* (2018) these include: increasing renewable energy and resource efficiency; delivering nature-based solutions; and taking a place-based approach. If successful, these priorities appear to accord closely with the approach advocated in this study.

Energy Conservation

Any move toward a more sustainable energy system must clearly include a concerted effort to conserve energy. The Energiewende movement in Germany argues that ‘a saved kilowatt-hour is the most cost-effective kilowatt hour’ (Agora Energiewende, 2013). Energy efficiency at a community level can be significantly improved through the retrofitting of existing housing. As identified by Adamson and Lang (2014), however, traditionally constructed houses have very poor levels of insulation and are difficult to bring to a modern level of energy performance.

The recent Committee on Climate Change report (2019) in UK housing stated that ‘we will not meet our targets for emissions reduction without near complete decarbonisation of the housing stock’. Energy use in homes currently accounts for around 14 percent of UK greenhouse gas emissions. The Committee’s report identifies five key issues, these are:

- Performance and compliance - the way new homes are built and existing homes retrofitted often falls short of design standards.
- Skills gap - the chopping and changing of UK Government policy has inhibited skills development in housing design, construction and in the installation of new measures.
- Retrofitting existing homes - the 29 million existing homes across the UK must be made low-carbon, low-energy and resilient to a changing climate.
- Building new homes - there are plans for 1.5 million new UK homes by 2022. These new homes must be built to be low-carbon, energy and water efficient and climate resilient.
- Finance and funding - there are urgent funding needs which must be addressed now with the support of HM Treasury (including, low-carbon heating currently and resources for local authorities, in particular building control).

In 2016, 23 percent of all households in Wales experienced fuel poverty (those that had to spend more than 10 percent of household income on household fuel costs), with three percent experiencing severe fuel poverty (spending more than 20 percent on fuel costs) (Beaumont et al., 2016). There is a strong consensus that living in a cold home will have lasting impacts on health, educational attainment and the social aspects of resident’s lives, and households with

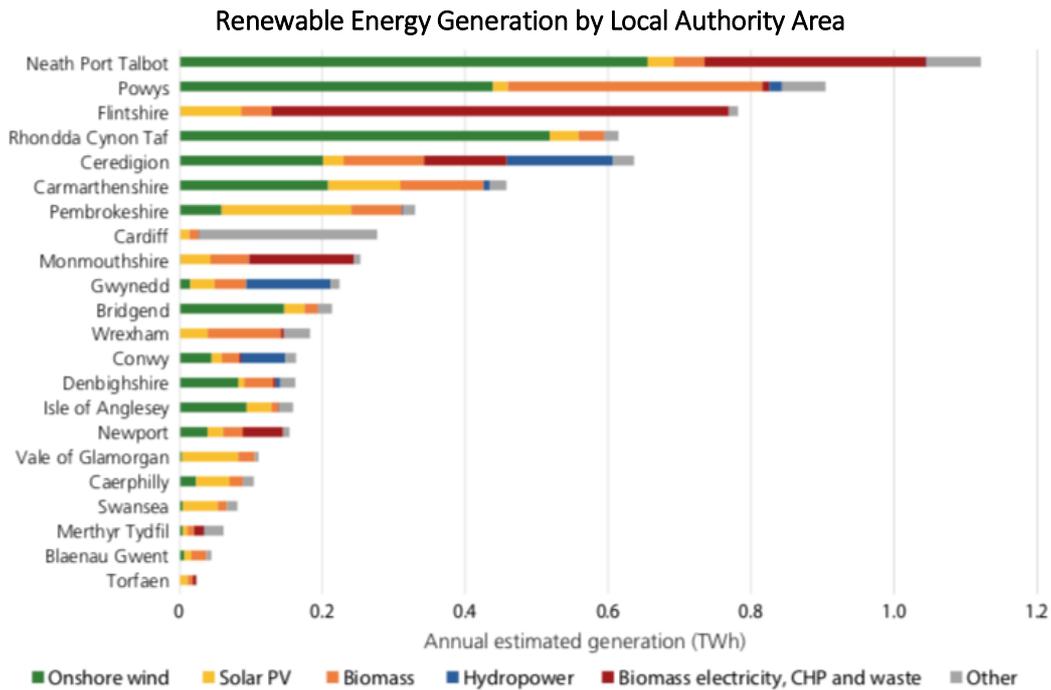
older people, children, disabled people and people with a limited long-term illness, including people with respiratory or circulatory disease, or people with a mental health condition are most vulnerable and tend to have lower incomes (Bridgeman et. al., 2016). The combination of improving home energy efficiency and strengthening local economies, offer opportunities to improve equitable socio-economic outcomes for the most vulnerable outcomes.

The Welsh Government's NEST home energy efficiency scheme, which provides fully funded improvement measures targeted at low-income owner-occupied and private rented households with low energy ratings, and Welsh Housing Quality Standard, which is being undertaken in socially rented housing, are helping to address these issues. The ARBED experience in Wales has also offered good lessons for future practice (Adamson and Lang, 2014). The ARBED programme demonstrated that this employment capacity can be directly targeted at local marginalised populations to provide training and apprenticeship opportunities. Additionally, the opportunity to develop the local supply chain is considerable. (Welsh Government, 2014a)

A recent report for the IWA (Jones, 2018) argues that unlike renewable generation, 'where the bulk of spending "leaks" from Wales', much of the spending on domestic refurbishment is captured within Wales. In part, it suggests, this a result of the more labour intensive nature of refurbishment work, but also due to generic technologies involved that Wales has commercial capacity to produce. The report calculates, that an investment of £1.16bn in domestic refurbishment for energy saving could create 33,000 person years of employment in Wales. Over a 15-year period this would equate to 2,200 full-time jobs on average, in areas such as construction, related skilled trades and professional services such as surveying, planning, and engineering.

Energy Generation

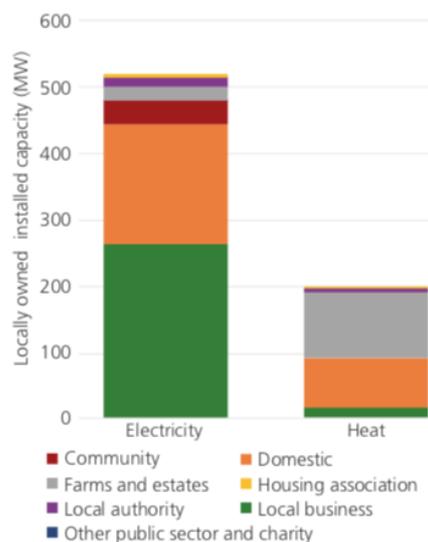
Over recent years, UK energy policy has moved away from energy conservation and renewable generation. Feed-in tariffs for smaller energy production are reducing and there has been a change in arrangements whereby the tariff is only now agreed after the facility is constructed. Although there is now some uncertainty, there appears to be a general trend by the UK Government to look towards nuclear, imported gas and 'fracking' as a foundation for UK energy supply for the next 30 years. Meanwhile public opposition to on-shore wind energy continues, and schemes that appear to offer significant potential for green energy production, such as the tidal lagoons proposed for the South Wales coast have failed to gain the necessary support.



Source: Welsh Government, 2017

Community energy generation offers a means for rural communities, in particular, to generate income streams, which can be used to subsidise energy costs or other community benefits (Powell et. al., 2018). Concerns have been raised about the difficulties in bringing such schemes forward in Wales, however, ‘...the challenges for local communities in becoming involved in renewable electricity generation have proved significant throughout this millennium. Community renewable energy schemes comprise less than 0.5 percent of Welsh renewables capacity and the situation is likely to worsen given the changes to reduced UK Government policy support for renewables’ (Jones, 2018).

Locally Owned Renewable Electricity and Heat Capacity in Wales by Ownership Type



Source: Welsh Government, 2017

Green energy production more readily lends itself to a localised model than current grid distributed fossil fuel energy production. The current grid dominated structure of UK energy production and supply makes change difficult, but examples drawn from Europe, such as the Energiewende model in Germany, show that change is possible.

Although there are some difficulties in bringing forward such schemes, there are significant potential benefits to be derived from local and community involvement in energy production. Jones (2018) suggested that, in the context of small and community hydro power generation, local and community ownership could:

- Almost double local economic impact when compared with non-local, commercial developments.
- Communities could use benefit funds to further reduce emissions and energy use, and increase energy resilience.
- Engage local people more widely around the subjects of energy security, energy poverty and climate change.

Hines et. al. (2008) argued that turning each home into a 'power station' and creating a 'carbon army' of workers improving the carbon performance of traditional housing stock, not only helps resolve energy supply and climate change issues, but also provides local employment and economic activity.

Local energy clubs, which are planning to use technology such as smart metering, aim to reduce energy purchasing costs for larger groups of people. Several pilot schemes are now being tested, but the impact of such an approach may be limited in rural communities due to the scale that may be required to achieve purchasing power. (Powell et. al., 2018).

6.3 Health and Social Care

In the UK over 70 percent of adult community care is provided by the independent sector (UKHCA, 2013). Large care firms argue, however, that the sector is undermined by insufficient funding provided by local authorities. This, they argue, is the cause of high staff turnover, poor working conditions and consequential issues surrounding the quality of care provision. A report by CRESC (2016) has shown, however, that the causes of these weaknesses and the apparent unsustainability of adult community care arise from the profit extracted by the large chains that control the sector: 'the chains bring return on capital targets of up to 12%; cash extraction tied to the opportunistic loading of subsidiaries with debt; and tax avoidance through complex multi-level corporate structure which undermine any kind of accountability for public funding'.

Carmarthenshire County Council recently took over the direct delivery of some of the County's community care provision following the collapse of one of its private sector contractors. This is an important decision by the authority, and demonstrates its responsibility to ensure that care is ultimately delivered. The Council may decide that it wishes to continue to deliver care directly as a core public service, but there are other options for it to consider in the longer-term. There is significant international evidence of the benefits that can accrue from alternative co-operative models of adult community care provision. In Bologna, 85 percent of social services are provided by co-operatives. (Restakis, 2015) The experience of Bologna, as

well as that of other locations such as Quebec, help illustrate that social business models can lead to better innovation and reinvestment of surplus.

In Sunderland, CASA operates as a large mutual with 600 worker owners delivering over 10,000 care hours per week. Although the organisation is not a worker co-operative, it is an employee ownership model that provides home care for the elderly as well as adults with a range of disabilities. The scale of the business model overcomes the minimum asset requirements specified by care commissioners in England. In practice the locally based CASA firms operate as semi-autonomous mutuals. There is very low staff turnover, six percent compared to a UK turnover range annually of between 25 and 50 percent among private sector care providers. (Millar et. al., 2016) A report by the New Economics Foundation commissioned by Mind, has also shown the potential of social business models in mental health care provision. The report identifies the intrinsic value for individuals, the increased capacity and impact of public services, and the monetary value to individuals and the state, as being the critical value of coproduction in mental health (NEF, 2013).

Despite the objectives contained within the Social Services and Well-Being (Wales) Act 2014 to create a more mixed economy of provision in health and social care through the use of social business models (Article 16 placed a duty on local authorities to promote the use of more social enterprises), there remain very few social business care providers in Wales. (Millar et. al., 2016) The potential of alternative social business models for adult community care provision are considerable, they can deliver a higher standard of care and improved working conditions and terms of employment. They can also make the future of community care provision more viable, and ultimately improve local economic outcomes as a result of a better paid local workforce.

6.4 The Environment

Welsh Government's project impacts from climate change (medium emissions scenario, with a 50 percent probability), indicates that by 2050 daily maximum temperatures in summer will increase by 2.4 Celsius, whilst daily minimum temperatures in winter will increase by 2.5 Celsius. Under this scenario, rainfall in winter will increase on average by 14 percent and decrease in summer by 16 percent. By 2080 these changes become more extreme. (Welsh Government, 2018) While accepting the need to prepare for the impacts of climate change, Welsh Government also argues it is necessary to limit the cause by reducing emissions of greenhouse gases such as carbon dioxide. The Environment (Wales) Act places a duty on the Government to ensure that by 2050, net emissions are *at least* 80 percent lower than the baseline set in legislation.

The Carmarthenshire Well-being Plan (2018) also acknowledges the need to act to ensure ecosystem resilience and promotes the values of the Circular Economy. The Ellen MacArthur Foundation argues that the values of the Circular Economy - extending the use cycle length of an asset; increasing the utilization of an asset or resource; looping or cascading an asset through additional use cycles; regenerating natural capital [resources] - can be supported by intelligent assets - using the growing 'internet of things', the knowledge of location, condition and availability of assets - to significantly increase global GDP whilst also reducing global carbon emissions (Ellen MacArthur Foundation, 2016). A statement by Welsh Government in 2016

acknowledged the importance of the circular economy, claiming that it could contribute £2bn per year to the Welsh economy (NAfW Record of Proceedings, 14/06/16).

There is a growing belief that Circular Economy is only part of the solution to address environmental degradation. Interest in what has been termed 'Regenerative Agriculture' is growing. This describes farming and grazing practices that reverse climate change by rebuilding soil organic matter and restoring degraded soil biodiversity, resulting in carbon drawdown and improving the water cycle. Regenerative Agriculture not only 'does no harm' to the land, but actually seeks to improve it.

Example: The Pontbren Project

The Pontbren Project is an approach to using woodland management and tree planting to improve the efficiency of upland livestock farming, led by a group of neighbouring farmers in mid-Wales. The farmers developed new on-farm uses for woodland products. They found that tree planting not only improved farm businesses and wildlife habitats, but had also reduced water run-off during heavy rain.

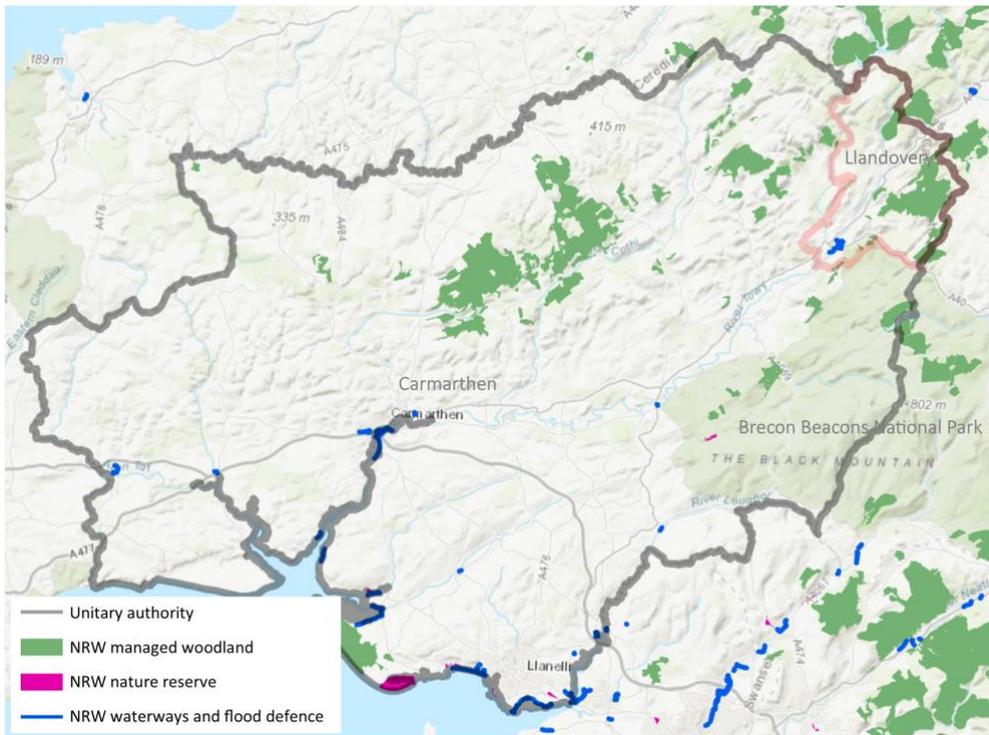
Research has found that strategically located belts of trees are effective at reducing the amount of water running off and improved upland grasslands. Data from Pontbren is now being used to study the effects of land use on bigger catchments prone to flooding. (Keenleyside, 2013)

In the context of planning for the post-Brexit landscape, Welsh Government is currently proposing two different funds to replace the Basic Payment Scheme of the CAP from 2020: the 'Economic Resilience' scheme, which would provide investment for economic activities, in particular food and timber production; and the 'Public Goods' scheme, providing support for public goods delivery, particularly relating to the environment (Welsh Government, 2018). Opinions on the suitability of such approaches in the area around Llandovery that were expressed during the research for this study were divergent. Some Think Space participants felt that the nature of landscape in the countryside around Llandovery limits the extent of diversification that could take place to potentially only timber. Other opinions supported the growing interest in more environmentally sensitive and less intensive forms of farming, which perhaps also more readily lend themselves to smaller scale, distributed food production.

The 'distributed economy' is linked to the bio-based economy due to the locality of biomass production and the low sustainability of its transportation over long distances. This means that local production in close proximity to raw materials is important (Luoma et. al., 2011). As discussed above, in the Distributed Economy basic needs such as food and energy should, as far as possible, be produced locally. Local production reduces the impact of global market changes and increases local resilience. There are also local economic development opportunities to be derived from local production (Luoma et. al., 2011). In the closer integration of people, towns and environment, the importance of natural resources become far more clearly understood.

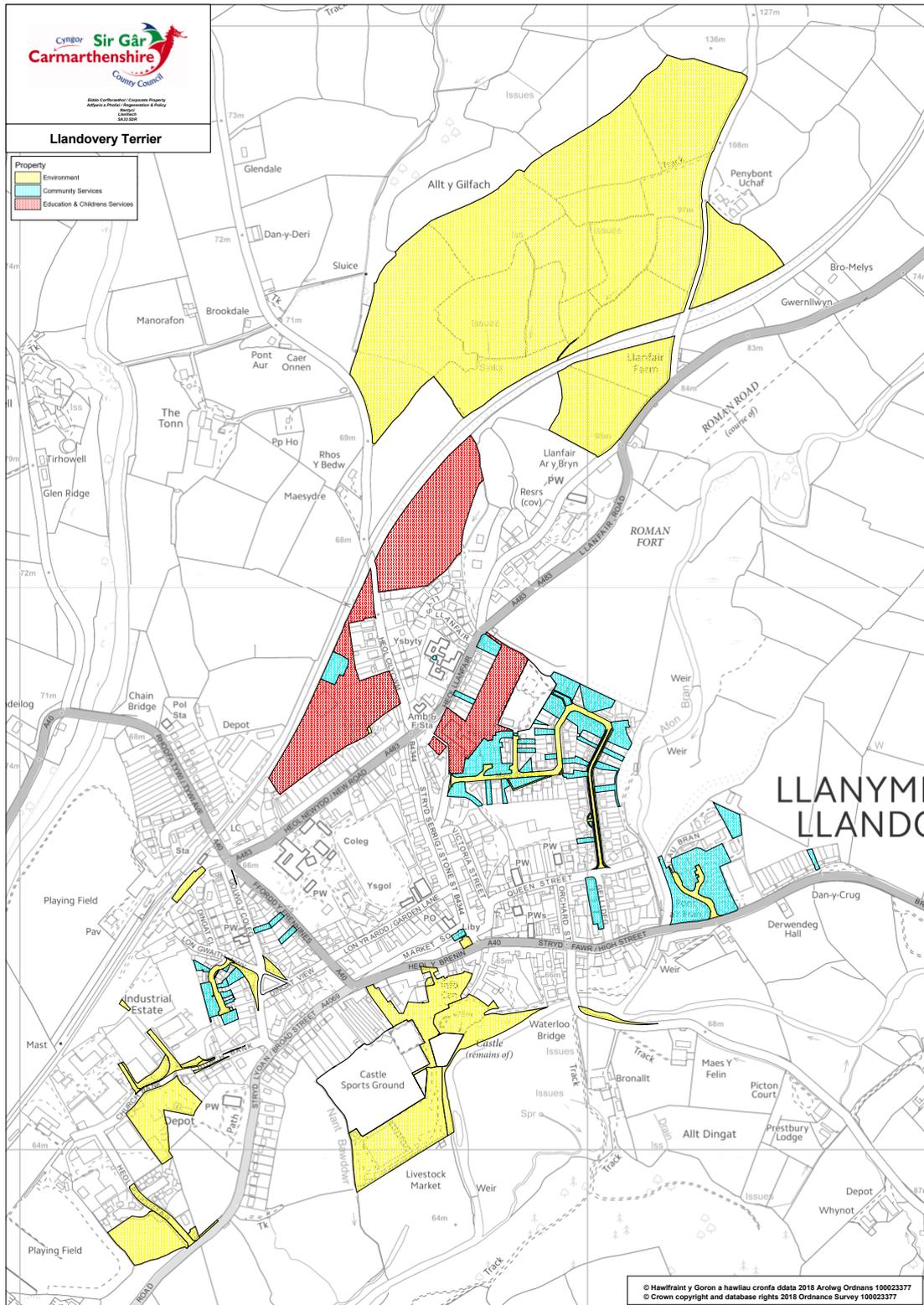
There are significant land assets in and around Llandovery that are in public ownership. In Carmarthenshire, NRW owns areas of land including Brechfa Forest and Tywi forest, with Welsh Government Forest Estate accounting for approximately five percent of the total land area.

NRW Owned Land in Carmarthenshire



Carmarthenshire Council also owns various parcels of land in and around Llandovery, as shown in the map below.

Local Authority Owned Land, Llandovery



Source: Carmarthenshire County Borough Council

There is no doubt that the fundamental changes required pose significant challenges to traditional forms of farming. It is essential that policy responses are supportive of the farming community if the shift is to be successfully managed. One way in which the public sector can show real leadership is by actually delivering on the necessary changes in their own

management of natural resources, either directly or through targeted and supported transfer of custodianship of land assets to communities to manage (the current Skyline project in South East Wales is exploring this idea in detail).

6.5 E-commerce and Employment

An important emphasis within the Deep Place approach is the critical need to deliver more economic activity locally. This is, in part, a response to the need to strengthen local economies, but it is also a recognition that realising a low carbon community over the next generation will require a radical reorganisation of work patterns to reduce car-based commuting (transport will be discussed in greater detail below). In the early stages of any transition to a more localised, but connected economy, some level of public provision will be necessary to kick-start new patterns of employment and commercial activity. In the past, Wales has invested in highly expensive initiatives such as Techniums, but more modest investment can have a significant impact.

The establishment of ‘technological clusters’ by developing ‘meanwhile uses’ of existing buildings can be supported with far lower levels of investment. One of the key advantages of such clusters is the development of synergies between clients who often begin trading with each other to provide local economic activity. In this approach, currently empty buildings can be utilised to provide low cost or free office space to start-up businesses and those who wish to work remotely from their main place of employment. The buildings are made safe, provided with utility connections and high-speed broadband connectivity. Workspaces are established of variable sizes and common, shared facilities for reprographics, meeting space and kitchen areas are provided. Clients can book space from as little as one hour to a permanent allocation and can be as small as a single desk or as large as a suite.

Cardiff University’s Digital Maturity Index shows that there is a significant difference between the levels of digital take-up between SMEs in urban and rural areas of Wales. Currently 17 percent of rural firms are digitally disengaged (Jones, 2019). As discussed above, there are much high rates of self-employment in rural areas, and in 2011 Llandovery Ward had a self-employment rate of 15.9 percent (20.2 percent males, 11.5 percent females; 28.8 percent part-time and 71.2 percent full-time) (2011 Census). If this entrepreneurship is to be supported, facilities that offer high speed broadband, as well as other office and co-working facilities, should be developed.

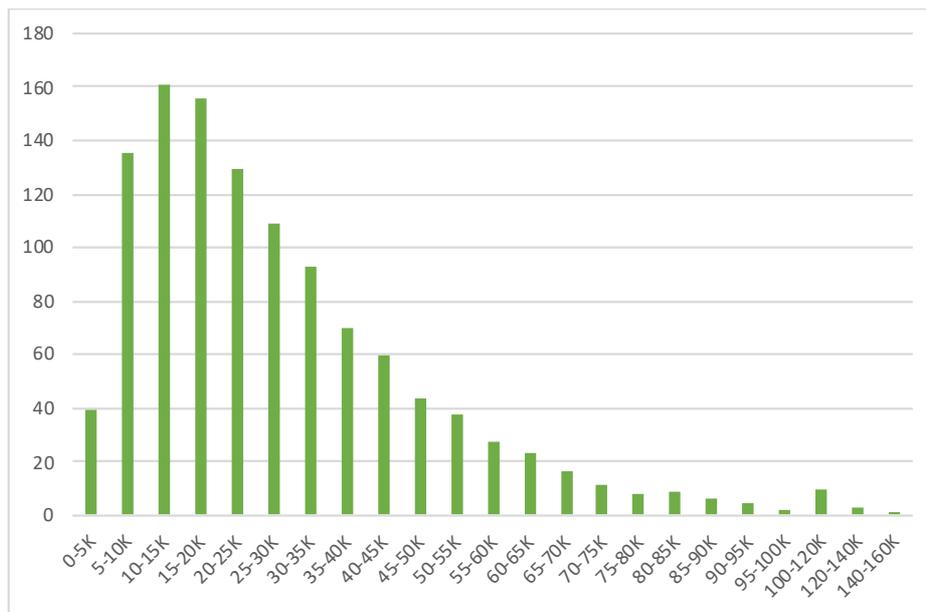
7.0 Challenges

7.1 Poverty

Carmarthenshire County Council’s (2015) *Rural Poverty Study* identified several key symptoms of poverty in rural area of the county, these included: transport; childcare; digital Inclusion; fuel; leisure; loneliness and isolation; housing availability and affordability; awareness of food banks; and support for carers. These are generally consistent with the broader experiences of rural poverty discussed earlier in this study. What lies behind many of these issues, however, are low levels of household income.

Aggregate figures can hide the true scale of poverty that affects communities in both urban and rural areas across Wales. The chart below shows the distribution of household income by income band in Llandoverly. During 2018, the average (median) gross household income in the UK was £28,400 (ONS, 2019). The estimated median household income Llandoverly in 2018 was £23,362, which is the 15th lowest (of 58 wards) in Carmarthenshire and 9.1 percent below the Carmarthenshire median of £25,488.

Number of Households by Income Band – Llandoverly Ward



Source: CACI Paycheck, 2018

The table below shows the number of households in Llandoverly with gross household income below 60 percent of the median UK income. This is the most commonly used method for calculating poverty in the UK, and the approach adopted by the Deep Place method. On this basis around 39 percent of households in Llandoverly are living in poverty, this is around four percent higher than the Carmarthenshire average, and around six percent higher than the Wales average. This causes significant financial stress, and it has been reported during this research that this is a major issue in the agricultural community.

Gross Household Income				
	Total Households	Median Income	No. Housholds Below 60% Median UK Income	% Housholds Below 60% Median UK Income
Llandoverly 1	631	£23,444	251	39.8
Llandoverly 2	525	£23,273	205	39
Llandoverly Ward	1,156	£23,362	456	39.4
Carmarthenshire		£25,488		35.5
Wales		£26,931		33.6

Source: CACI Paycheck, 2018

7.2 Health

Population Health

Across Wales public health continues to worsen, whilst there has been a decrease in smoking rates over the last 10 years, obesity levels have noticeably increased. Welsh Government's *Fairer Health Outcomes for All: Reducing Inequalities in Health Strategic Action Plan* (2011), confirmed that far from reducing inequalities, the gaps in health and well-being have actually been increasing over the last 20 years. Health inequalities are amongst the most visible indicators of poverty in the UK. Smoking levels, obesity and alcohol abuse are highest in poorer parts of Wales, as are mental health problems with high dependency on prescription antidepressants. High cancer rates, linked to poor lifestyles and late presentation, are also higher in poorer areas, as are suicide rates.

Although the data is not available for Llandoverly, the area of Carmarthenshire within which it is located has slightly higher female, and lower male life expectancy at birth than the Wales average.

Life Expectancy at Birth		
MSOA	Females	Males
W02000143 (2011-15)	82.8	77.0
Carmarthenshire (2013-15)	82.3	78.6
Wales	82.3	78.4

Source: Public Health Wales Observatory, using PHM and MYE (ONS).

Using selected adult public health indicators, Llandoverly and the surrounding areas of Carmarthenshire tends to have noticeably better lifestyles. As the table below shows, residents tend to eat a better diet, take more exercise, and smoke and drink less than the Wales average.

% Selected Adult Public Health Indicators (2010-15)				
USOA	Eating 5 Portions of Fruit and Veg Per Day	30 minutes of physical exercise 5+ days per week	Smokers	Drinking above guidelines
W03000033	40.9	36.9	18.5	36.8
Wales	33.1	29.54	21.7	41.96

Source: Public Health Wales Observatory, using WHS (WG)

At the time of the last Census (2011), 7.4 percent of residents in Llandoverly Ward reported they were in either 'bad' or 'very bad' health, and 25 percent said that their day-to-day activities were limited 'a little' or 'a lot'. These public health indicators appear to demonstrate that the general health of the population in and around Llandoverly tends to compare well to wider Wales averages.

Discussions held during the Think Spaces undertaken as part of this research strongly indicated that the health of population of Llandoverly may, in part, be explained by the generally active lifestyles. For a town of its size, Llandoverly has a wide range of well used sports facilities, including: a swimming pool, squash court, golf course, tennis courts, and walking clubs.

Perhaps most famously, Llandoverly also has extensive rugby facilities, and Llandoverly Rugby Club, for example, has over 150 active junior members. The sports facilities of Llandoverly College are also used by the local community.

The generally better lifestyles of the population may also be partly explained, as shown in the table below, by the comparatively much cleaner environment.

Environment	
MSOA	Nitrogen dioxide (NO ₂) average concentration at residential dwelling locations, 2016
W02000143	4.6
Carmarthenshire	6.9
Wales	11.4

Source: Public Health Wales Observatory, using modelled air quality data (DEFRA), MYE and dwelling counts (ONS).

Children

Despite a renewed commitment by Welsh Government to end child poverty in Wales by 2020 (Child Poverty Strategy for Wales, 2015), poverty continues to adversely affect children more than any other age group in Wales. Perhaps the most startling manifestation of this is found in the data concerning child mortality. The death rate for children in the most deprived one-fifth of Wales is 70 percent higher than the least deprived one-fifth areas of Wales (Reilly and Price, 2015).

The Allen Report (2011) undertaken for the UK Government argued that ‘many of the costly and damaging social problems in society are created because we are not giving children the right type of support in their earliest years’. The Report identified that:

- A child’s development score at just 22 months can serve as an accurate predictor of educational outcomes at 26 years;
- Some 54 per cent of the incidence of depression in women and 58 percent of suicide attempts by women have been attributed to adverse childhood experiences;
- Boys assessed at age three as being ‘at risk’ were likely to have two and a half times as many criminal convictions at age 21 as those deemed not to be at risk.

Allen suggests that part of the explanation appears to be that babies are born with 25 percent of their brains developed, and there is then a rapid period of development so that by the age of three their brains are 80 percent developed. In that period, neglect, poor parenting and other adverse experiences can have a profound effect on how children are emotionally ‘wired’. Moreover, Stevens (2011) suggested that the evidence concerning the economic benefits gains resulting from early intervention designed to promote the emotional and social well-being of vulnerable children was strong.

The child poverty rate varies between the two LSOA in Llandoverly. Whereas Llandoverly One has a child poverty rate of 17 percent, which is eight percent below the Wales average, Llandoverly Two has a child poverty rate that is two percent above the Wales average.

% Child Poverty (Aged 0-18) 2017	
Llandoverly 1	17
Llandoverly 2	27
Carmarthenshire	23
Wales	25

Source: Public Health Wales Observatory, using WIMD 2014 (WG) and MYE (ONS)

The table below shows that the percentage of low birth weights are above the Wales average in both of Llandoverly's LSOA. A note of caution should be used of this data, however, as there are also comparatively fewer children overall living in the area.

% Low Birth Weight (2007-16)	
Llandoverly 1	6.5
Llandoverly 2	5.6
Carmarthenshire (2016)	4.4
Wales	5.4

Source: Public Health Wales Observatory, using NCCHD (NWIS).

(Below 2500g, RCT and Wales Figures for 2016 only.)

The tables below show that childhood obesity levels are lower than average in the area of Carmarthenshire within which Llandoverly is located, as are the rate of teenage pregnancies.

Children Aged 5 Healthy Weight or Underweight (2013/14-2015/16)	
MSOA	Percentage
W02000143 (2011-15)	76.5
Carmarthenshire (2015-16)	70.4
Wales	73.8

Source: Public Health Wales Observatory, using CMP (NWIS).

Teenage Pregnancies (2011-2015)	
USOA	Rate Per 1,000 Females
W03000033	15.1
Wales	28.47

Source: Public Health Wales Observatory, using Conceptions data and MYE (ONS)

The Marmot Review (2010) identified six policy objectives to reduce health inequalities, two of which were specifically focused on children:

- Give every child the best start in life;
- Enable all children, young people and adults to maximise their capabilities and have control over their lives;
- Ensure healthy standard of living for all;
- Strengthen the role and impact of ill-health prevention;
- Create and develop healthy and sustainable places and communities.

Marmot argued that delivering these policy areas required action by central and local government, the NHS, the third and private sectors and community groups.

Health Service Delivery

Llandoverly has its own community hospital, which makes it unusual amongst rural communities. The hospital has a minor injuries unit, but also has 16 beds in total that are used

for GP or consultant referred rehabilitation. Three of these beds are held for palliative care. Unlike some areas, there has not been a problem of recruiting GPs locally in Llandoverly, which was reported during this research to be a result of careful succession planning.

Although the data for ambulance response times in Llandoverly has not been available for this study, analysis by the BBC (2019) of health trust data, shows that ambulance response times in rural areas are on average significantly longer in rural than urban areas. Across the UK, between January to October 2018 the average ambulance response time in urban areas was seven minutes fourteen seconds, whilst in rural areas it was eleven minutes and thirteen seconds.

It was reported during this research that Hywel Dda Health Board is consulting on a possible community HUB to be located in Llandoverly. The best example in the UK of a multiagency community hub is the Bromley-by-Bow Centre in East London, and there has been significant interest by health and other professionals in its model. Although the Bromley-by-Bow context is very different from that found in rural Carmarthenshire, there may be much to emulate in its multi-agency approach even in this radically different context (Powell et. al., 2018)

In some of the USA states there is a co-operative model of local people trained in delivering primary care and health services (Gardiner et. al., 2012). The World Health Organisation has also highlighted the possibilities of China's 'barefoot doctors' - health workers who live in the community they serve and are focused on prevention rather than cure (WHO, 2008). This model is usually referred to as 'lay health' provision and there is growing evidence of its effectiveness in key areas including breastfeeding (Morrow et. al., 1999), and in more general health objectives such as immunisation, breast cancer screening and pulmonary health (Lewin, 2005).

The Health Service as an Anchor Institution

The annual cost of dealing with the consequences of inequalities in health in Wales is an estimated £3.2bn-£4bn (Welsh Government, 2011). There is, however, a recognised connection between sustainable social, economic and environmental regeneration and improvements to public health (WLGA, 2008). Identifying and realising the actual and potential economic benefits of the health service can make a critical contribution to the local economy. In this respect the health service can be seen as an 'anchor institution'. As part of the foundational economy, health services are located in communities and are both a major employer and a major consumer of goods and services. The employment potential is best realised where there is good local alignment between educational and training provision and employment opportunities for various occupations in the health service.

As a consumer of goods and services, the health service offers considerable potential for local economic impact. Current procurement practice tends toward centralised and consortium purchasing for very sound reasons of economies of scale. Beyond the highly specialised goods and services required by health care organisations, however, there is considerable opportunity for more local purchasing patterns, particularly in the supply of food and basic services such as cleaning, catering and ancillary services. The potential impact of this spend in poorer local economies is significant. In Cleveland USA, the power of local hospitals to achieve local

economic impacts by developing their role as anchor institutions is having a significant impact on addressing the causes *of the causes* of health inequalities through the Evergreen Co-operatives.

In the UK, the FSB (2013) concluded that for every £1 of public spending with local SMEs a further 63 pence is generated in the local economy. This perspective has been recognised in the procurement review conducted by Welsh Government (McClelland, 2012), and the resulting Community Benefits Toolkit by Value Wales. Fully harnessing the power of the health service as an anchor institution could do much to improve struggling local economies, which in turn could have a major positive impact on socio-economic causes health inequalities.

7.3 Education and Skills

Education

The closure of Llandovery's secondary school, Ysgol Pantycelyn, was bitterly regretted by the community. The decision to close the secondary school was taken as a result of declining pupil numbers, which is symptomatic of rural depopulation, particularly of younger people. Although there is confidence that Llandovery's primary school, which draws pupils from a wider geographical area, is not under threat of closure, in the long-term this decision will depend on maintaining thriving communities in and around Llandovery. Llandovery also has a long-standing independent and boarding school, Llandovery College, for boys and girls between the ages 4-18.

Whilst this research has found that the community is realistic about the highly unlikely possibility of the secondary school reopening, there is a real commitment to make meaningful use of the former school's premises. Carmarthenshire Council has announced plans to move Llandovery's primary school onto the site following refurbishment, a move that appears to be welcomed by the community. The school is also likely to have surplus space that might be available for wider community use, and this would appear to offer an ideal facility for community education.

Wider community education could be something driven by the primary school, maybe in partnership with a wider coalition of education and skills providers. Such an approach would require support, but would fit with a growing interest in 'Community Focused Schools'. A National Assembly for Wales Circular (No 34/2003) defined a Community Focused School as:

...one that provides a range of services and activities, often beyond the school day, to help meet the needs of its pupils, their families and the wider community. Across Wales many schools already provide some community services including adult education, study support, ICT facilities and community sports programmes.

OECD Pisa rankings in Wales have been particularly bad relative to other parts of the UK, and have continued to fall since 2006 (Dixon, 2013). From 2008 Welsh Government's School Effectiveness Framework sought to align schools, local authorities and Welsh Government in a tri-level reform process. Pupils were also encouraged to become engaged in the school improvement programme at the local level. Egan (2013) argued that in order to successfully close the poverty gap in education, there need to be interventions as part of a holistic strategy involving schools, families and communities:

- **Schools** need strategic plans, which refuse to accept that poverty should lead to low achievement; use data to track the progress of each individual child and, if necessary, intervene individually; ensure that teachers use the best professional knowledge on learning and teaching and improve student performance; and ensure that the well-being of young people is developed and that they have the resilience and the motivation to work hard and achieve their potential.
- Involving parents and **families** in the education of their children, outside of what happens in school, is the most cost effective way of closing the poverty gap in educational attainment. The best ways to do this are greater involvement of the parents in the work of the school; improving at-home parenting, so children are better supported; engaging parents with their own learning as well as their children's; and better aligning the expectations schools have of students with the expectations of their parents (also supported by Sharples et. al., 2011).
- The **community** you come from and grow up in is hugely important in influencing how well you do in education. Schools and communities need to work much more closely together to maximise the benefits of this relationship.

Across the UK children from the lowest income families are half as likely to get five good GCSEs and study subsequently at university (Sharples, et. al., 2011). Egan (2013, 2013b) argues that pupils from poor backgrounds do not have parental support for their education from the age of seven onwards, not because parents do not have aspirations for their children, but rather because they do not have the ability to support them or to assist with homework. From this perspective, Community Focused Schooling may have a positive impact on improving equality.

Skills

A higher percentage of school leavers in the part of Carmarthenshire within which Llandovery is located tend to gain higher-grade GCSEs than the Wales or Carmarthenshire averages.

School Leavers with Skills & Qualifications (Level 2 - 5 A*-C GCSEs or Equivalent) (2016)	
MSOA	Percentage
W02000143	71.4
<i>Carmarthenshire</i>	65.1
<i>Wales</i>	60.44

*Source: Public Health Wales Observatory, using WED and PLASC (WG)
Including English/Welsh First Language and Maths*

In general, across Wales, concerns persist about the success of more vocationally focused education. Despite the successes of the apprentice model in Wales, agricultural apprenticeships are extremely limited and account for just one percent of all apprenticeships in Wales over the last two academic years. Only 325 of 31,360 apprenticeships during 2017/18 were in agriculture (Stats Wales). Coleg Sir Gar in Carmarthenshire appears to be bucking the trend and has proposals to establish a Rural Skills and Innovation Hub at Gelli Aur, in Carmarthenshire.

European-wide research undertaken by Mourshed et. al. (2014) has considered the causes of youth unemployment, and whilst more young people are looking for work, they argue that employers cannot find the skills they need. The research has shown an apparent discrepancy with 74 percent of education providers confident that their graduates were prepared for work, whilst only 38 percent of young people and 35 percent of employers agreed. This would appear to be supported by research undertaken by Adamson and McDougall (2013) into learning provision and the patterns of local employment, which found a significant discrepancy between FE course provision and local employment opportunities. There appears, therefore, to be a general need to better integrate skills and local economic development strategies with the needs of the existing small business base, as well as existing large businesses.

7.4 Housing

The availability of good, affordable housing represents one of the most basic human needs. At the time of the last Census there were a total of 1,170 households in Llandovery, of these 771 were owner-occupied, whilst the remainder were rented. There are greater numbers of socially rented households in Llandovery One, and privately rented households in Llandovery Two.

Housing Tenure						
LSOA	Total Households	Owned Outright	Owned With Mortgage or Loan	Social Rented	Private Rented	Living Rent-free
Llandovery 1	615	295	129	122	48	20
Llandovery 2	555	210	137	59	122	27
Carmarthenshire	78829	32648	23678	11672	9301	1352
Wales	1302676	461370	417284	214911	184254	20381

Source: Census 2011

In Wales, Registered Social Landlords need to meet the Welsh Housing Quality Standard (WHQS) obligations, which lays down minimum standards that once achieved must also be maintained. It should be noted, however, that although WHQS requires, for example, houses to have central heating (96.5 percent of houses in Llandovery Ward have central heating, [Census, 2011]), it does not assess whether disadvantaged households can afford to use it. WHQS does not, of course, directly affect either the private rented sector or owner-occupied housing.

The majority housing type in Llandovery One is detached, whilst the predominant housing type in Llandovery Two is terraced.

Percentage Accomodation Type - 2011				
LSOA	Detached	Semi-detached	Terraced	Caravan or Other Mobile of Temporary Structure
Llandovery 1	54.5	33.2	6.7	0.4
Llandovery 2	17.7	28.6	41.6	0.3
Carmarthenshire	38.8	33.1	19.9	0.6
Wales	22.7	31	27.8	0.4

Source: Census 2011

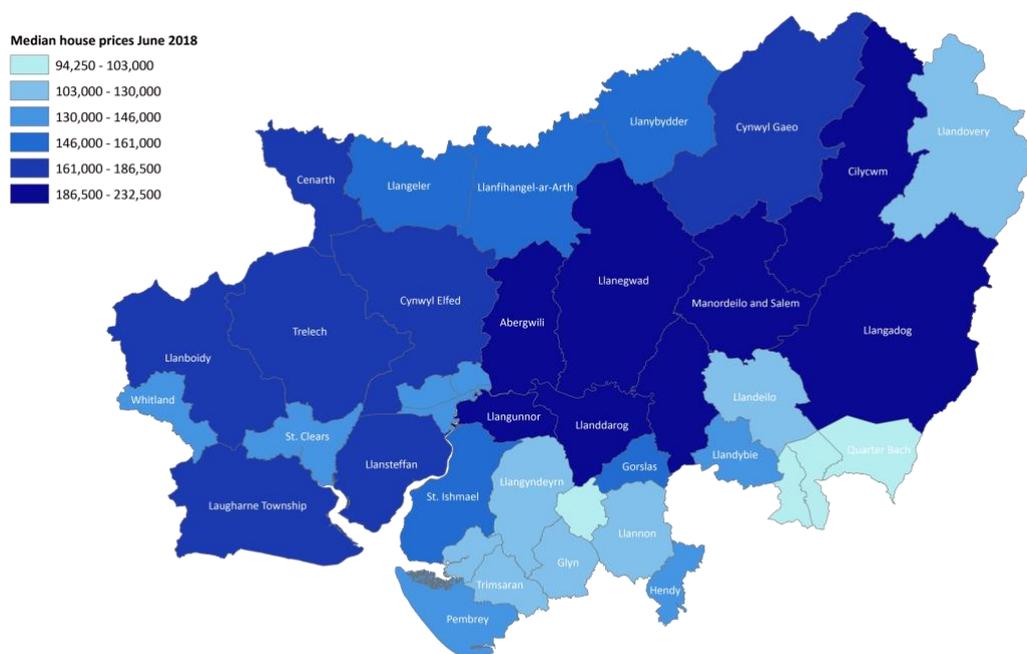
The table below shows the distribution of housing by council tax band across Llandovery. The data shows that there are significantly more Band E properties in Llandovery One and

significantly fewer in Llandovery Two, than the Wales and Carmarthenshire averages. Another notable comparison is the significantly larger number of Band C properties in Llandovery Two, than in Llandovery One or the Carmarthenshire and Wales averages.

Percentage Housing by Council Tax Band - 31 March 2017							
LSOA	A	B	C	D	E	F	G
Llandovery 1	10.77	15.38	21.54	16.92	24.62	10.77	1.58
Llandovery 2	9.84	22.95	37.7	18.3	6.56	3.28	1.64
Carmarthenshire	10.56	27.85	20.74	16.06	14.25	7.21	2.42
Wales	14.72	21.03	21.73	16.12	13.35	8.09	3.39

Source: VOA

The map below illustrates the variation of median house prices across Carmarthenshire in June 2018. It shows that Llandovery Ward has amongst the lowest house prices in the county, with a median average of between £103k-£130k. The average weekly rental of a three bedroom property in Llandovery in 2015 was between £135-£155 (Carmarthenshire County Council, 2015).



Lack of access to affordable housing in rural areas is widely regarded as an important symptom of rural poverty. In areas with a strong housing market, affordable housing is usually achieved on the back of private sector building programmes. Local market prices tend to prevent conventional profit margins being achieved and the level of risk is seen as too high (see Adamson and Lang, 2014). In some European communities, self-build projects have secured new housing supply. In this approach, public land assets are made available and sold as building plots.

Planning restrictions and difficulties in securing mortgages are often cited as the key barriers to achieving similar approaches in the UK. More emphasis has been placed in Wales on the development of co-operative housing development (Wales Co-operative Centre, 2013), and the Welsh Government made available a fund of £1.9m to facilitate the development of co-operative housing solution in three pilot areas: Newport, Cardiff and Carmarthen.

The Calon Cymru Network, which seeks to develop sustainable rural communities across the Heart of Wales Railway Line, is aiming to increase the supply of affordable homes to be developed by a new Community Land Trust (CLT). Their 2017 report outlined their proposals for increasing the supply of affordable sustainable housing supply in Llandovery. Interventions in Scotland and Kentucky show that where government support is available, and the legislative framework is favourable, CLTs can be effective in meeting local needs (Racher, 2017).

A Community Property Trust (CPT) is a not-for-profit organisation that can be established by local people. The Trust holds the freehold and equity in land and/or property in trust for the community and must ensure that the:

‘...land and property it controls continues to be used to meet housing, employment and community needs, on terms the community can afford. It derives income from the land it controls, usually from rents, which it uses either to repay loans taken out to build homes, workshops and community facilities, or to make provision for new amenities or meet identified needs’ (High Bickington Community Property Trust, 2017).

CLTs and CPTs in the UK have the capacity to provide long-term affordable housing, although financial viability usually depends on provision and sale of houses or other infrastructure on the open market, and some initial external support (loan or grant, or provision of land at a reasonable price). Although community trusts often only provide small numbers of units the process of establishing a CLT or CPT and obtaining planning permission is often slow, especially if the proposed development is regarded in some way as ‘innovative’ or outside the current local development plan. (Powell et. al., 2018).

The increasing demand for and limited supply of housing, and inadequate stock of rented houses has, however, led to a rural housing deficit both in terms of quality and affordability (JRF, 2000). This is significant unmet housing need in many rural areas and a lack of affordable housing is one of the key issues facing most rural communities. CPTs and CLTs would appear to offer one solution to bring forward additional supply where conventional market approaches are unable to.

7.5 Transport

The table below shows that at the time of the last Census, the preponderance of household access to a car or van was higher in Llandovery than the Wales average. Nevertheless, 20 percent of households in Llandovery Two, and 16.8 percent in Llandovery One, had no access to a car or van.

% Household Access to Car or Van		
LSOA Name	No Access	Access
Llandoverly 1	16.8	83.3
Llandoverly 2	20	80
<i>Carmarthenshire</i>	<i>18.8</i>	<i>81.2</i>
<i>Wales</i>	<i>22.9</i>	<i>77.1</i>

Source: Census 2011

The primary means of traveling to work was as a passenger in a car or van, although this was lower than the Carmarthenshire or Wales averages. Correspondingly, the number of people who walk to work is higher in Llandoverly, and particularly so in Llandoverly Two. This would appear to suggest that were people live and work in the town they are more likely to walk than the average Wales and Carmarthenshire averages. The number of people who work from home is also notably higher in Llandoverly One.

Percentage Method of Travel to Work						
LSOA Name	Car - Driver or Passenger	On Foot	Work Mainly from Home	Public Transport	By Bicycle	Other Methods
Llandoverly 1	32	9.6	11	0.5	0.8	0.7
Llandoverly 2	34.9	20	5.2	1.3	1.3	0.3
<i>Carmarthenshire</i>	<i>46.7</i>	<i>5.8</i>	<i>4.9</i>	<i>1.9</i>	<i>0.5</i>	<i>0.9</i>
<i>Wales</i>	<i>45</i>	<i>6.5</i>	<i>3.3</i>	<i>4.1</i>	<i>0.9</i>	<i>1</i>

Source: Census 2011

It should be noted that in general the average UK journey time to work has been steadily increasing. The National Travel Survey shows the average commute takes 28 minutes (DfT, 2011), but there is a close correlation between the commuting distance travelled per person per year and levels of household income. Individuals in the highest income quintile travel almost eight times further (2,529 miles) for commuting per year than those in the lowest quintile (DfT, 2011). This would appear to broadly accord with the pattern in Llandoverly, as shown in the table below.

16+ Travel to Work Distances 2011								
	Llandoverly 1 < 10Km	Llandoverly 2 < 10Km	Llandoverly 1 10Km ≥	Llandoverly 2 10Km ≥	Llandoverly 1 From Home	Llandoverly 2 From Home	Llandoverly 1 Other	Llandoverly 2 Other
Managers; directors and senior officials	12	19	19	12	27	31	3	4
Professional	20	25	38	38	21	17	4	2
Associate professional and technical	4	6	18	18	8	10	7	4
Administrative and secretarial	18	18	13	18	8	4	1	0
Skilled trades	36	39	12	24	83	19	26	24
Caring; leisure and other service	38	36	15	14	9	11	3	5
Sales and customer service	14	29	7	15	1	1	1	1
Process; plant and machine operatives	11	25	7	9	8	3	10	12
Elementary	29	55	11	20	10	6	9	7
Total	182	252	140	168	175	102	64	59

Source: Census 2011

Whereas the more localised employment and entrepreneurial patterns espoused elsewhere in this study would clearly reduce the need for transport, a certain degree of transport requirement would remain. The high degree of private car or van use in Llandoverly identified above is, in part, a reflection of the poor public transport provision. Train and bus services are infrequent and tend to not provide viable commuting options. The long-distance nature of rural commuting also makes other forms of transport, such as walking and bicycles, and unlikely option for most. There is about a five-mile radius to the limit of what people are prepared to cycle (Sustrans Cymru), and even less to walk, when accessing services or employment.

Community transport often fills accessibility gaps in public transport, but it is not an inexpensive transport option and unit costs can often be higher. The total number of passenger journeys provided by community transport in Wales in 2010 was over 1.2 million (Community Transport Association, 2010). One model to increase the use of community transport, often undermined by funding arrangements, is for closer partnership working between public transport provision and community transport provision (Mulley and Nelson, 2012). Reliance on community transport schemes will not satisfy the needs of all sectors of the rural population (Powell et. al., 2018). This has led to a growing interest in community car share clubs in rural communities, particularly where this is based on electric vehicles.

Example: Edeyrnion Electric Car Club

With £450k of funding from Big Lottery Wales, Welsh Government-funded rural development agency Cadwyn Clwyd, and the Bus Services Support Grant, the South Denbighshire Community Partnership have introduced a community car club in Edeyrnion, near Corwen, Denbighshire. The scheme aims to tackle social exclusion caused by the cost of car ownership in areas where there is also limited public transport. Members of car club pay an annual £50 fee and are charged by the hour or by the day to use an electric vehicle. Other similar community car share schemes exist in Cilgwyn, Pembrokeshire, and Talybont-on-Usk, Llanidloes and Machynlleth in Powys. (BBC, 11/12/18)

8.0 Conclusions

This study has sought to apply the Deep Place approach to Llandoverly. In particular, it has sought to identify the range of local assets, and the challenges that currently constrain the town. It has also attempted to identify opportunities that might contribute to the long-term economic, social, environmental and cultural sustainability of the settlement. In this respect, it is consistent with the spirit of the Well-Being of Future Generations (Wales) Act 2015.

The essential contribution this study seeks to make, and which is to be found throughout this report, is to a general shift in approaches toward sustainable place-making in Llandoverly that is more holistic, place-based and longer-term. The economic logic of the agglomeration for growth, and the overriding emphasis on infrastructure and an 'investment ready' skills base in economic policy, would appear to offer little to the sustainable place-making agenda.

At the start of this study one central question was asked: What type of society do we need to create in Llandoverly to achieve economic, social, cultural and environmental sustainability over the next generation? The answer arising from this report is:

A society where there is significantly increased localisation of economic activity, greater social equity in economic outcomes, and a better integration of people and environment.

This answer is not meant to be overly prescriptive however, and it is important that particular local responses are developed. There is no comprehensive whole-place plan for the future of Llandoverly. This study lays the groundwork for the development of such a plan, but the next, more detailed phases must be co-productive and seek to involve the local community in its

broadest sense. In that respect, this study suggests that the first step should be the establishment of a Llandovery 'Coalition for Change', which should be co-productive in nature and involve representatives from the local community, businesses, voluntary sector and public services. It should be chaired by a local community member or representative, and an officer from Carmarthenshire Council should provide a professional secretariat.

On considering the available evidence, and on engaging with the local community, businesses and policy makers, this study suggests a number of potential issues and actions a Llandovery Coalition for Change may wish to consider.

- Depopulation and an aging population are major issues. Between 2011-17 the population of Llandovery declined by a further 4.6 percent. It is estimated that on current trajectories by 2039 one in three residents of Llandovery will be over the age of 65. Whilst there is clearly a need to maintain Llandovery's cultural distinctiveness, efforts need to be made to encourage in-migration, particularly of working age families with children.
- There is a need to support sustainable and environmentally sensitive forms of local enterprise development. This should be based on indigenous local businesses and existing high levels of self-employment. The creation of a low-cost business hub, providing business facilities for the self-employed, start-ups and small businesses should be considered. This must include access to high speed broadband, as well as other business facilities.
- Llandovery town centre should be a central focus of attempts to strengthen the local economy. As well as forming the location of a potential business hub, other efforts should be made to encourage greater footfall in the town. Currently, most household spend on weekly groceries located in large supermarket chains located outside of the town.
- Any physical regeneration activities should be taken forward incrementally to maximise the use of limited resources. The refurbishment of any buildings as part of this process should be linked to a specific end use, with a clear business plan in place.
- There remains a core of public services located in Llandovery, these must be protected from further decline and additional efforts should be made to distribute a greater element of public services to the town. This might, for example, involve the creation of a multi-agency public service hub. This should be located as close to the centre of the town as possible, which would help in efforts to increase footfall.
- Support should be given to Llandovery's tourist and visitor related businesses to flourish and constantly improve their offer. Llandovery has the potential to increase its number of visitors and their spend. Though clearly not the only element of its future economy, it does occupy an important role.
- The agricultural community around Llandovery faces an uncertain future, particularly in the context of Brexit. Recent attempts by Welsh Government to plan for a post-CAP landscape are welcome, but should be taken forward with care. Agriculture continues to occupy an important part of the economy of Llandovery, but household income levels for many of those employed in agriculture are very low.

- There are around 1,200 households in Llandovery. Energy efficiency measures and the retro fitting of existing housing stock would appear to offer multiple benefits, including: reduced environmental impact, increased local economic activity, public health improvements, and lower household bills. A comprehensive survey of household energy efficiency should be considered in Llandovery, which could form the initial development stages of a programme of energy efficiency measures throughout the town.
- Although property prices are comparatively low in Llandovery, household income levels are also low. The poverty rate is around 39 percent. Housing affordability would, therefore, appear to be an issue for many local families. There has been very little new housing development in Llandovery in recent years, and as part of a wider strategy to encourage in-migration of younger families, the sensitive development of a relatively small number of sustainable new housing units should be considered. This could be based on a co-operative and community form of delivery, and may make use of local authority owned land in and around the town centre.
- Carefully consideration should be given to the results of the recent Skyline feasibility study undertaken in South East Wales, and, in particular, the suitability of the community land transfer model for part of the extensive NRW estate in the countryside surrounding Llandovery.
- A community focused schooling approach should be considered. This would not only support the attainment rates of children and young people, but also encourage parental and wider community learning. This could involve a key role for Llandovery's primary school, including the use of surplus space and facilities following its move to the larger former secondary school site, but may also seek to engage a wider partnership of education and skills providers. This might offer opportunities for 14-19 learning pathways to be delivered in the town, as well as life-long learning for the whole community.
- Although much of the emphasis in this study has been on localising economic and social activity, which may reduce the overall need for transport, a degree of connectivity will always be necessary and, indeed, beneficial. As well as longer-term issues around improving the frequency of services in the Heart of Wales Railway Line, other more immediate measure could include the development of a community car hub utilising electric vehicles.

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