Powys Local Development Plan
Topic Paper
Economy – Town Centres & Retail Development

DEPOSIT VERSION PAPER
(Updates the Pre-Deposit Stage version)

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1.0 Introduction

1.1 The planning system regulates the development and use of land in the public interest. It should reconcile the needs of development and conservation, securing economy, efficiency and amenity in the use of land, thereby contributing to sustainable development.

1.2 In 2004, the Planning and Compulsory Purchase Act introduced a new Local Plan process for Wales. The new system requires each authority in Wales to prepare a Local Development Plan (LDP) for their area which, once adopted, replaces any existing development plan, which for Powys is the Powys Unitary Development Plan (UDP).

1.3 Welsh Assembly Government guidance on the preparation of LDPs includes, within Paragraph 4.3 of *Local Development Plans Wales: Policy on Preparation of LDPs* (WG, 2005), that local planning authorities are required to prepare, maintain or have access to an up-to-date information base on sufficient aspects of the economic, environmental and social characteristics of their area in order to ensure that its development plan policies and proposals are founded on a thorough understanding of the area's needs, opportunities and constraints

1.4 This paper is therefore one of a series of topic papers being prepared by Powys County Council as part of its preparation of the Powys Local Development Plan.
The aims of these papers are therefore to:
- Provide a summary of the policies and strategies at national, regional and local level that will influence the development of Powys' Local Development Plan
- Provide a summary of the current evidence base for the topic
- Identify key messages arising from the policy review and evidence base
- Identify emerging key issues
- Provide a review of existing Powys development plan (UDP) policies for the topic

1.5 Whilst each topic paper produced focuses on a different theme, they are inter-related and together form the strategic overview of issues to be addressed in the Local Development Plan.

- The *Economy* Theme

The Economy theme covers a broad range of spatial planning & development issues which can be distilled into three main sub-themes:
- Employment and Economic Development
- Town Centres and Retail Development
- Tourism

The subject of this topic paper is the *Town Centres and Retail Development* sub-theme.

2.0 European, National and Regional Policy Context

It is essential that the Town Centres and Retail Development policies and proposals contained within Powys' Local Development Plan are consistent and integrated with European, National and Regional legislation, regulations, plans and strategies.
This section of the topic paper therefore provides an overview of this national and regional policy context and highlights some of the most relevant messages for the preparation of Powys' Local Development Plan.

2.1 Welsh Government: Programme for Government Report (2014)

2.1.1 The Programme for Government is the Welsh Government's roadmap for this Assembly term. It highlights the Government's "commitment to delivery, and a move away from an approach to measuring success that placed too much emphasis on the amount of money spent, or the number of policies implemented, rather than the impact government is actually having on people's lives".

2.1.2 In relation to the retail economy, the programme identifies under "Growth & Sustainable Jobs" that Welsh Government aim is "to strengthen the conditions that will enable business to create jobs and sustainable economic growth" and its commitments include "supporting the economy and business".

2.2 *One Wales: One Planet (May 2009)*

2.2.1 The Welsh Assembly Government's Sustainable Development Scheme, which sets out the Assembly's vision of a sustainable economy for Wales, as follows:
"A resilient and sustainable economy for Wales that is able to develop whilst stabilising, then reducing, use of natural resources and reducing its contribution to climate change."

2.3 *Capturing the Potential – A Green Jobs Strategy for Wales (July 2009)*

2.3.1 This document is the overarching strategy of the Welsh Assembly Government to achieve a sustainable economy for Wales. It provides an important delivery mechanism for WG's sustainable development scheme 'One Wales: One Planet' and describes in more detail how to achieve its vision (stated above).
The Strategy has three high level priorities, as follows:

- Supporting Business
- Fostering Innovation and Technology
- Investing in a More Sustainable Economy

2.4 *Planning & Compulsory Purchase Act 2004*

2.4.1 Section 61 of the Act states that:

(1) The local planning authority must keep under review the matters which may be expected to affect the development of their area or the planning of its development.

(2) These matters include –

(a) the principal … economic … characteristics of the area of the authority

Section 62 makes provision for the local planning authority to prepare local development plans (LDPs) setting out their objectives in relation to the use and development of land in their area and their general policies for the implementation of those objectives.

2.5 *The Wales Spatial Plan: People, Places, Futures (2004)*

2.5.1 The Planning and Compulsory Purchase Act 2004 states that local planning authorities, in preparing a local development plan (LDP), must have regard to the Wales Spatial Plan (WSP). Indeed having regard to the Wales Spatial Plan is one of the tests of soundness of a LDP. Nonetheless, the WSP is not part of the statutory development plan framework and as such a LDP does not have to 'conform' with the WSP.

The WSP provides the context and direction of travel for LDPs.

The Spatial Plan's Vision states:

"We will sustain our communities by tackling the challenges presented by population and economic change; we will grow in ways which will increase our competitiveness while spreading prosperity to less well-off areas and reducing negative environmental impacts; we will enhance our natural and built environment for its own sake and for what it contributes to our well-being, and we will sustain our distinctive identity."

The Plan is structured according to 5 guiding themes of:

Building Sustainable Communities, *Promoting a Sustainable Economy*, *Valuing our Environment*, *Achieving Sustainable Accessibility* and *Respecting Distinctiveness*.

Under these themes a number of all-Wales objectives and actions have been identified.

2.5.2 More locally the WSP splits Wales into 6 sub-regions and Powys lies within the 'Central Wales Spatial Plan Area'. However, the Ystradgynlais area in the south of the County is also covered by the 'Swansea Bay – Waterfront and Western Valleys Spatial Plan Area'.

Each of the sub-regions has an Area Strategy within the WSP which identifies a vision, propositions and actions for each area.

2.5.3 *The Central Wales Spatial Plan Area*

The WSP vision for this area is as follows:

"High-quality living and working in smaller-scale settlements set within a superb environment, providing dynamic models of rural sustainable development, moving all sectors to higher value-added activities"

The Strategy states that economically the area has a promising future based on its environmental attractiveness and quality of life, and potential to develop high value-added work. The challenge is to reconcile this with greater opportunities for young people to stay in the area or return to it.

Specific emphasis is placed upon promoting further town centre improvements in the area's main centres, reflecting both their established roles, with the capacity and need for further development. Smaller centres are identified as needing help to establish "a greater mass of services – based on the leisure and tourism market, for example".

In this regard one of the propositions for this area states:

- o The current mosaic and scale of towns needs to be reinforced, enhancing their attractiveness as places in which to live and work creatively, while improving links with surrounding rural communities, building on a network of complementary regional and local centres

2.5.4 *The Swansea Bay – Waterfront and Western Valleys Spatial Plan Area*

The WSP vision for this area is as follows:

"An area of planned sustainable growth and environmental improvement, realising its potential, supported by integrated transport within the area and externally and spreading prosperity to support the revitalisation of West Wales"

The main elements of the strategy for the area are:

- o Development of a modern, attractive and vibrant waterfront urban area
- o Revitalisation of Swansea as Wales' second national city
- o Enhanced transport links between inland communities and the coast

With specific regard to retailing and town centres within this area the strategy identifies that Swansea has the regional capital retailing function, whilst Carmarthen is identified as an important service, retail and employment centre that serves a large hinterland.

2.6 *The Wales Spatial Plan – 2008 Update: People, Places, Futures*

2.6.1 The 2008 Update to the Wales Spatial Plan updates the Plan to reflect new drivers of change and the area work that has developed following the publication of the original Plan.

The 2008 Update identifies key issues and challenges facing all of Wales, set out under the five Wales Spatial Plan themes. Some of those most pertinent to this topic paper are listed below:

2.6.1.1 *Building Sustainable Communities*

Identifies the roles of settlements in Wales in the delivery of job opportunities.

Identifies the importance of co-ordinating activities and investment relating to transport, skills and employment, housing and inward investment.

2.6.1.2 *Promoting a Sustainable Economy*

Recognises the need to develop key settlements with complementary roles to support a prosperous economy in rural areas.

Identifies that out-of-town retail developments risk undermining the regeneration and viability of town centres as well as contributing to unsustainable traffic patterns.

2.6.1.3 *Valuing our Environment*

Recognises the importance of protecting, regenerating and enhancing the land, marine and historic environment for economic opportunities

2.6.1.4 *Achieving Sustainable Accessibility*

Recognises that Citizens must be able to access job opportunities and public services – health, social services, education etc if equality of opportunity is to be successfully promoted in Wales.
Businesses need improved access to markets to create new job opportunities and secure these in the longer term.
Recognises the need to reduce the need to travel by co-locating jobs, housing and services, for instance.

2.6.1.5 *Respecting Distinctiveness*

Identifies the importance of sustaining and celebrating what is distinctive about Wales to our future economic competitiveness.

2.6.2 The 2008 Update then identifies priorities for each of the Plan's sub-regions:

2.6.3 *The Central Wales Spatial Plan Area*

Priorities identified for this area, relating to this topic, include:

- Building on the important key centres in the area, whilst improving linkages and spreading benefit and growth to the wider hinterlands and rural communities that fall outside those immediate places
- Broadening the economic base and introduce new sustainable economic opportunities across the rural area, maximising opportunities for growth in all sectors, for better paid and higher skilled jobs and raising the level of home grown enterprise and attracting creative enterprising newcomers.

2.6.3.1 The Central Wales Spatial Plan Area Strategy provides a model for sustainable development broadly identifying primary settlements and hubs and clusters as focal points for appropriate plan-led growth and investment.
Powys' primary settlements, hubs and clusters are illustrated in the Central Wales Spatial Plan Area map and include:

- The Llandrindod Wells cluster
- The Severn Valley cluster with Newtown identified as a primary settlement
- Ystradgynlais in the south of the County, whilst maintaining links with the Brecon Beacons cluster, has significant influence and linkages with the Swansea Bay – Waterfront and Western Valleys Spatial Plan Area which will necessitate strong cross-boundary synergy in its future development.

This approach seeks to encourage communities to work collaboratively, not competitively, to support their own needs and the needs of smaller settlements that gravitate towards them.

2.6.4 *The Swansea Bay – Waterfront and Western Valleys Spatial Plan Area*

As detailed above the Ystradgynlais area of Powys also lies within the Swansea Bay – Waterfront and Western Valleys Spatial Plan Area.
Key priorities for this area include:

- Improving accessibility including telecommunications and transport connections
- Reducing economic inactivity and developing an integrated skills strategy

2.6.4.1 11 key settlements (hubs) have been identified across the region for their critical role in the success of the area. These settlements provide an important local service & employment function and are the focus for regeneration activity such as providing improved shopping, leisure, community & cultural facilities and clean vibrant town centres. Ystradgynlais, however, is

one of a number of other smaller settlements across the area identified as supporting communities but dependant on the hubs for some key amenities.
It is anticipated that, if the key settlements are successful, they will benefit their hinterlands (including smaller settlements) by offering increased access to job opportunities and amenities and by stimulating the local market for employment, housing and retail development.

2.7 *Economic Renewal: a new direction (July 2010)*

2.7.1 Economic Renewal: a new direction provides a new WG approach to achieving a vision of making Wales "one of the best places in the world to live and to work".
The document has been adopted by WG as the economic development strategy for Wales and it builds on, but supersedes, the earlier policy documents *A Winning Wales (2002)* and *Wales: A Vibrant Economy (2005)*

2.7.2 The new approach outlined in the document is organised by five priorities:

- o Investing in high-quality and sustainable infrastructure
- o Making Wales a more attractive place to do business

As part of this priority WG has reviewed planning policy for economic development to ensure that Planning Policy Wales delivers their economic development policy.

- o Broadening and deepening the skills base
- o Encouraging innovation
- o Targeting the business support we offer

2.8 *Framework for Regeneration Areas (October 2010)*

2.8.1 This WG framework builds upon its Ambition Statement for Regeneration and provides clarity on the WG's regeneration area approach.
There are seven regeneration areas in Wales, namely the *Heads of the Valleys*, *Mon a Menai*, *North Wales Coast*, *Western Valleys*, *Swansea*, *Aberystwyth* and *Barry*.
The broad outcomes sought in each of these areas are:

- Increasing prosperity and wellbeing for the whole community
- Moving towards a low carbon economy
- Improving life chances for children and young people

The only part of Powys' Local Planning Authority Area which fell within one of these Regeneration Areas is the Ystradgynlais area which forms part of the Western Valleys Regeneration Area.

2.11 *Vibrant and Viable Places (March 2013)*

2.11.1 This is the Welsh Government's new regeneration framework, with the vision that everybody in Wales should live in well-connected vibrant, viable and sustainable communities with a strong local economy and good quality of life.

2.11.2 The framework sets a number of national outcomes to achieve prosperous, learning and healthier communities. Under these outcomes a number of activities at the regional and local level are supported, including:
- improved levels of economic activity and more jobs;
- strong and diverse local economies with private, public and third sectors working together;
- well-connected communities supported by transport and broadband connections;
- successful town centres and coastal communities; and
- a well-managed historic and natural environment contributing to the distinctiveness of Wales' landscape and settlements with heritage and historic character conserved, valued and sustained.

2.11.3 The framework gives three principles for effective regeneration:
Partnership: involving effective communication and joint working between and across all sectors, which embraces good practice, equality and innovation;
Strategy: underpinned by evidence-based programmes and combining dynamic leadership with robust governance, including monitoring and evaluation, to ensure value for money; and
Sustainable Development: the Welsh Government's central organising principle, enabling long-term investment through locally conceived and delivered projects, within a shared overarching strategy.

2.11.4 The approach to achieving regeneration involves using robust evidence to inform strategies and investment decisions and combining improvements to places with support for the people who live in them.

2.11.5 A number of key priorities for investment are identified which includes a more targeted approach to successful place making resulting in more intensive investment in fewer places to maximise impact, identifying 3 urgent places for targeted investment:
- Town centres serving 21st Century towns;
- Coastal communities; and
- Communities First clusters

2.11.6 More detailed information on "Town Centres serving 21st Century Towns" is included within the framework document which identifies issues of relevance to this paper, including:
- In urban areas: the decline of the traditional high street with changing shopping habits, in particular increasing online and out-of-town purchases, combined with falling disposable incomes, causing difficulties for all sections of the high street. Whilst some urban centres will be able to sustain a retail offer, in many cases this will be much reduced, with more town centre accommodation being redeveloped for residential use and to deliver local services.
- In rural areas: low population densities, poor accessibility and connectivity, and poor ICT and Broadband coverage restricting local growth.

The document then states that "the next 10 years will be about the diversification of our high streets and standing up and making tough decisions. It will also be about the reinforcement of what makes them special.

Our towns will no longer be able to depend on retail alone; we need to develop our towns into destinations for living, for working and for leisure".

2.11.7 Part of Vibrant and Viable Places framework's support for town centres is a £5m Town Centre Loans Fund to aims to help support town centre regeneration in four areas of Wales, with funding shared equally between four local authorities with Ceredigion, Powys, Pembrokeshire and Monmouthshire each receiving a loan of £1.25m. This funding will be used to reduce the number of empty, underused sites and premises in town centres. The properties will be redeveloped as shops, homes and leisure facilities. The funding works on a recyclable loan basis, which means that once the money is repaid, it is used again to fund new loans. Whilst the funding may be recycled over a 15 year period, the Welsh Government will require it to be returned in full after 15 years.

2.12 *Planning Policy Wales, Edition 7 (July 2014)*

2.12.1 The Assembly Government's objectives for retailing and town centres are to:

- o secure accessible, efficient, competitive and innovative retail provision for all the communities of Wales, in both urban and rural areas;
- o promote established town, district, local and village centres as the most appropriate locations for retailing, leisure and other complementary functions;
- o enhance the vitality, attractiveness and viability of town, district, local and village centres; and to
- o promote access to these centres by public transport, walking and cycling

2.12.2 Para 10.1.2 emphasises the importance of locating retail provision in proximity to other commercial businesses, facilities for leisure, community facilities and employment to sustain and enhance the vitality, attractiveness and viability of town, district, local and village centres as well as contributing to a reduction of travel demand. In this regard, para. 10.2.4 highlights that policies should encourage a diversity of uses in centres, including mixed use developments.

2.12.3 Para 10.1.4 acknowledges that outside of established centres corner shops, village shops, public houses and other individual outlets with a retail function can play a vital economic and social role and their loss can be damaging to the local economy.

2.12.4 The document, in paragraph 10.2.1 advises that the local planning authority should:

- Develop a clear strategy and policies for retail development that seek to achieve vital, attractive and viable centres.
- Set out a framework for the future of town, district, local and village centres that promote a successful retailing sector supporting existing communities and centres
- Establish the existing hierarchy of centres, identifying those which fulfil specialist functions and be clear about their future roles

- Identify changing pressures and opportunities and devise appropriate responses to them

It also identifies that it may be necessary to:

- Take pro-active steps to identify town or city centre locations for expansion
- In others it may be necessary to identify measures to reinvigorate centres, or to manage decline in the relative importance of a centre as other centres expand. Dealing with change may mean redefining the boundaries of centres or identifying acceptable changes of use.

2.12.5 Within the section of the document on "Support for existing centres" it is identified that the development plan for an Authority:

- Should encourage a diversity of uses in centres (including mixed use developments (para. 10.2.4)
- Should encourage traffic management in centres including the provision of good access to town and other centres for walkers and cyclists and for public transport (para. 10.2.6)
- May distinguish between primary frontages (with a high proportion of retail uses) and secondary frontages (areas of mixed commercial development including, for example, restaurants & banks etc) in town centres (para. 10.2.7)
- Should, within policies and supplementary planning guidance, support management (enhancement and promotion) of town centres and, where appropriate, smaller centres (para. 10.2.8)

2.12.6 When considering the allocation of new sites for retail & leisure development and other uses best located in town, district, local or village centres in their development plan, the local planning authority is advised (in para. 10.2.9) that:

- Uses which need to be accessible to a large number of people (retailing, major leisure uses, local government offices, commercial offices, hospitals and tertiary education facilities) are preferably located in town centres
- Smaller scale retail provision, leisure facilities, local health centres, branch libraries, area offices of local government and primary schools are preferably located in district, local and village centres.

The document details (para. 10.2.11) a sequential approach to the selection of sites to be used when allocating sites for retail, leisure and other uses best located in existing centres.

2.12.7 Para. 10.2.10 states that in order to determine whether to identify sites for retail and leisure developments in the development plan the local planning authority should firstly consider whether there is a need for additional provision, with precedence given to quantitative need before qualitative factors are considered. If current provision appears adequate in quantity then further allocations in the plan will need to be fully justified (with justification criteria provided in the document).

2.12.8 The document also identifies (in para. 10.2.12) that as proposals may come forward for development irrespective of whether the plan provides allocations, the Authority's Development Plan should also include a criteria based policy against which such proposals can be judged.

2.12.9 Para 10.2.13 of the document concludes that:
“Development Plans should:

- establish the strategic role to be performed by the main centres in the retail hierarchy;
- set out measures to reinvigorate particular centres, as appropriate;
- set out detailed policies to achieve vital, attractive and viable centres;
- allocate sites for new retail and leisure facilities and other uses best located in town centres, where there is assessed to be a quantitative or qualitative need using the sequential approach;
- include a criteria based policy against which proposals coming forward on unallocated sites can be judged; and
- set out policies for primary and secondary frontages, where appropriate.“

2.13 *Technical Advice Note 4: Retailing and Town Centres (November 1996)*

2.13.1 Technical Advice Notes (TANs) should be read in conjunction with Planning Policy Wales and be taken into account by planning authorities in the preparation of development plans.

2.13.2 TAN4 provides additional guidance in support of national retail policy contained within Planning Policy Wales.

2.13.3 The TAN identifies information that the Local Planning Authority should collect in relation to retailing to assist in the preparation of development plans. The information identified
On an area wide basis the document identifies information which might be useful as:

- Population Change;
- Retail Provision; and
- Retail Expenditure

In addition, the document identifies that information of value in measuring vitality (how busy a centre is at different times and in different parts), attractiveness (facilities and character which draw in trade) and viability (ability of the centre to attract investment) of town centres includes:

- Turnover in relation to floorspace;
- Commercial yield on non-domestic property;
- Shopping rents;
- Retailer representation and change;
- Diversity of uses;
- Accessibility;
- Pedestrian flow;
- Proportion of vacant street level property;
- Customer views;
- Environmental quality; and
- Perception of safety/occurance of crime

2.13.4 The TAN also provides further guidance on the need to complete an impact assessment for retail development applications over 2,500 square metres, changes of use within shopping areas, car parking and non-statutory town centre management strategies.

2.14 *Technical Advice Note 6: Planning for Sustainable Rural Communities (July 2010)*

2.14.1 Technical Advice Notes (TANs) should be read in conjunction with Planning Policy Wales and be taken into account by planning authorities in the preparation of development plans.

2.14.2 TAN6 provides guidance on how the planning system can contribute to sustainable rural economies, sustainable rural housing, sustainable rural services and sustainable agriculture.

2.14.3 Of specific relevance to this topic paper is the section on *sustainable rural services* which highlights the importance of development plans:

i. facilitating the provision of services as an essential part of new developments (of sufficient size);
ii. seeking to broaden the range of services in local service centres to meet the needs of the catchment; and
iii. support the provision of local facilities outside of service centres, especially where they would benefit rural residents distant from existing facilities

2.14.4 Planning authorities are also advised to take a positive approach to planning proposals designed to improve the viability, accessibility or community value of existing services and facilities, including village shops and post offices, rural petrol stations and rural public houses. It advises that the Authority should support the retention and expansion of these local facilities and set out in the development plan the criteria to be applied when considering planning applications that will result in the loss of important village services.

2.14.5 Para. 3.8 of the document also identifies the role that *Farm Shops* can play, in meeting the essential needs of the community, by providing a diversity of retail services (for example a sub post office) in areas where there are no other shops.

2.15 *Local Development Plan Manual (2006)*

2.15.1 The Local Development Plan Manual provides practical and technical advice on how to prepare Local Development Plans. In relation to evidence gathering it states that it may prove useful to structure the collection and analysis of information around the following themes:

- Facts that assist in understanding current conditions in the area, including social, economic and environmental conditions, as well as opportunities and constraints and the current provision of service infrastructure (baseline)

- Past trends and future projections (longitudinal evidence), which will be valuable in identifying structural forces and the realistic scope to make a difference in the future; and
- Current and future drivers for change and the potential for policy leavers for intervention

2.15.2 It also identifies that information of particular relevance to be considered as part of the evidence base for the LDP includes:
Demand-side factors, including:
- demographic forecasts from the Assembly Government;
- economic projections including property market-based intelligence, past take-up rates, vacancies; and
- retail expenditure growth projections.

Supply-side factors, including:
- potential for infill and conversion and development on previously used land;
- employment land availability and rate of take up;
- capacity of physical and social infrastructure;
- transport accessibility; and
- environmental constraints and opportunities.

2.16 *Rural Development Programme 2014-2020*

2.16.1 The Wales Rural Development Programme 2014-2020 (RDP) is a 7 year European Agricultural Fund for Rural Development (EAFRD) programme funded by the European Union and Welsh Government. The Wales RDP 2014-2020, was submitted to the European Commission on 11 July 2014, could provide £953m of European and Welsh Government funding to rural Wales to help:
- increase the productivity, diversity and efficiency of Welsh farming and forestry businesses, improving their competitiveness and resilience, reducing their reliance on subsidies
- improve the Welsh environment, encouraging sustainable land management practices, the sustainable management of our natural resources and climate action in Wales
- promote strong, sustainable rural economic growth in Wales and encourage greater community-led local development.

2.16.2 There are 6 Rural Development Priorities which set the context for the EAFRD and any actions that form part of the RDP 2014-2020 will fit within this structure of priorities:
- fostering knowledge transfer and innovation in agriculture, forestry, and rural areas
- enhancing competitiveness of all types of agriculture and enhancing farm viability
- promoting food chain organisation and risk management in agriculture
- restoring, preserving and enhancing ecosystems dependent on agriculture and forestry

- promoting resource efficiency and supporting the shift towards a low carbon and climate resilient economy in agriculture, food and forestry sectors
- promoting social inclusion, poverty reduction and economic development in rural areas.

2.16.3 It anticipated that the new Wales RDP 2014-2020 will open from January 2015. However, the Wales RDP 2014-2020 is subject to change until the full programme has been agreed by the European Commission.

2.17 *Farming, Food & Countryside – Building a secure future: A new strategy for farming (May 2009)*

2.17.1 *Farming, Food & Countryside* (FFC) builds on, and continues the work of, the earlier *Farming For The Future* strategy published by WG (in November 2001) and takes into account the recommendations of the independent *Sustainable Farming and Environment – Action Towards 2020* report.

2.17.2 As detailed in the *Farming, Food & Countryside* document, the agricultural industry faces a number of key challenges in Wales, including:
- Declining trend in dairy, beef and sheep numbers which could undermine the rural economy as well as impacting adversely on landscapes and habitats
- As farm profits remain heavily subsidy dependent farmers must strive for cost efficiencies and productivity improvements
- Opportunities to diversify and to add value will further reduce subsidy dependency
- Improving efficiency and profitability while reducing the environmental impact of farming

2.17.3 It outlines the WG's policy direction to secure a sustainable future for the farming, food and land based production industries and the Welsh countryside environment through to 2020. The key aims of the strategy are as follows:
- Connecting to the marketplace
- Producing sustainably and profitably
- Safeguarding animal health and welfare, plant health and food safety
- Sustaining our countryside
- Encouraging innovation

2.17.4 Under each of these aims are detailed the outcomes to be achieved to indicate what success would look like.

2.17.5 Of particular relevance to this paper the document identifies, in the *Connecting to the Marketplace* section, that to remain economically viable farms will have to become highly efficient, while some will also expand to cut their costs of production through economies of scale. In addition, the document emphasises the importance of farmers adding value to their products and identifies a variety of means by which this can be achieved such as direct sales including farmers markets, box schemes, farm shops and internet marketing.

2.18 *One Wales: Connecting the Nation – The Wales Transport Strategy (May 2008)*

2.18.1 This document sets out how the Welsh Assembly Government proposes to deliver its transport duty. The Wales Transport Strategy (WTS) focuses on the role that transport can play in delivering the wider policy agenda of integrating transport with spatial planning, economic development, education, health, social services, environment and tourism, whilst meeting the strategic agenda and the implementation framework of the Wales Spatial Plan.

2.18.2 The vision of the WTS is *"to promote sustainable transport networks that safeguard the environment while strengthening our country's economic and social life'*

2.18.3 The WTS has a number of desired outcomes, which underpin the strategy. The WTS outcomes relating to the retail topic include:
- Improve access to shopping and leisure facilities
- Improve access to employment opportunities
- Improve connectivity within Wales and internationally
- Improve the efficient, reliable and sustainable movement of people
- Improve the efficient, reliable and sustainable movement of freight

The document identifies that access to a reasonable range of employment opportunities and shopping & leisure facilities at convenient times enhances economic activity, social interaction and reduces social exclusion, particularly for disadvantaged groups.

2.19 *National Transport Plan (March 2010) & Update*

2.19.1 The Wales NTP is the delivery mechanism for the Welsh Assembly Government led transport interventions outlined in the WTS. The NTP outlines policies and aims on a national and regional basis. The aims for the Mid Wales region are:
- To improve the reliability, quality and frequency of services on the east-west rail corridor in Mid Wales.
- To improve reliability, journey time and safety along the east-west road corridor in Mid Wales.
- To improve reliability, journey time and safety along the north-south road corridors.

The document then identifies a number of schemes to achieve these stated aims.

2.19.2 A review of this Plan is currently underway and the following key priorities have been identified in notes to local authorities in respect of updating the National Transport Plan:
- economic growth
- access to employment

- tackling poverty
- sustainable travel and safety, and
- access to services.

2.20 *Regional Transport Plan (September 2009)*

2.20.1 The Regional Transport Plan is an integrated transport strategy for Mid Wales (Ceredigion, Gwynedd and Powys) for the next 30 years prepared by TraCC.
It also provides a 5 year capital investment programme for transport schemes (excluding the major rail and trunk road schemes identified in the NTP).
The overall Vision for the TraCC region is:
'To plan for and deliver in partnership an integrated transport system in the TraCC region that facilitates economic development, ensures access for all to services and opportunities, sustains and improves the quality of community life and respects the environment'

2.20.2 The ten priorities of the RTP are to:
i. Reduce the demand for travel
ii. Minimise the impact of movement of the global and local environment and ensure the highest levels of protection to European Sites.
iii. Improve safety and security for all transport users.
iv. Improve travel accessibility to services, jobs and facilities for all sectors of society.
v. Improve the quality and integration of the public transport system including the role of community transport.
vi. Provide, promote and improve sustainable forms of travel
vii. Maintain and improve the existing transport infrastructure (road and rail).
viii. Ensure travel and accessibility issues are properly integrated into land use decisions.
ix. Improve the efficiency, reliability and connectivity of movement by all modes of transport within and between Mid Wales and the other regions of Wales and of England.
x. Deliver a co-ordinated and integrated travel and transport network through effective partnership working.

2.21 *Draft Mid Wales Local Transport Plan (2014)*

2.21.1 Local Transport Plans (LTPs) are required by the Welsh Government to replace, but continue the processes previously identified in, the RTP. Powys CC, Ceredigion CC and Gwynedd Council have collaborated to jointly produce a LTP, currently in Draft form, following the issue of Welsh Government guidance in May 2014. This document provides the present policy context and background data by which transport in Powys can be considered.

2.21.2 The Draft LTP identifies the following Vision for Transport in Mid Wales:

The Mid Wales Local Authorities will plan for and deliver in partnership an integrated and affordable transport system in the region that facilitates economic development, ensures access for all to services and opportunities, sustains and improves the quality of community life, and makes an active contribution to the management of carbon and the quality of the environment.

2.21.3 The LTP will identify issues and opportunities for all modes of transport within the local transport authorities' remit. The Draft LTP will be submitted for Welsh Government approval by January 2015.

3.0 Local Policy Context

As a spatial plan the Powys Local Development Plan will need to be consistent and integrated with other plans and strategies which have been prepared for the County, the most significant of which are detailed in this section.

3.1 *The One Powys Plan: A Single Delivery Plan for Powys*

3.1.1 The Local Government (Wales) Measure 2009 placed a duty on each Council in Wales to prepare a Community Strategy for promoting and improving the economic, social and environmental well being of their areas, and contributing to the achievement of sustainable development in the UK.

3.1.2 A new approach is being adopted in Powys with the development of The One Powys Plan. Its aim is to improve public services for the citizens of Powys by bringing together strategic partners in to a single planning and delivery framework.

3.1.3 In 2014, for the first time Powys Council merged its own improvement plan (previously called the Powys Change Plan) into the One Powys Plan. This has been done so that strategic partners can better work together for the good of the county. By producing a coherent plan residents can find out what is planned and what results they can expect to see if the priorities are achieved.

3.1.4 This move towards a more integrated approach across public sector delivery encompasses the work of the following organisations, partnerships and plans/strategies: -

- Brecon Beacons National Park Authority (Management Plan)
- Coleg Powys (Institutional Strategic Plan)
- Countryside Council for Wales (Corporate Plan)
- Dyfed Powys Police (BCU Policing Plan – part of the Local Policing Plan)
- Mid and West Wales Fire and Rescue Service (Command Business Plan – part of the Strategic Plan)
- Powys Association of Voluntary Organisations (Financial and Strategic Plan)
- Powys County Council (Change Plan)
- Powys teaching Health Board (Corporate Plan)

- Powys Local Service Board (Community Strategy)
- Powys Children and Young People's Partnership (Powys Children and Young People's Plan)
- Powys Community Safety Partnership (Powys Community Safety Plan)
- Powys Health Social Care and Well Being Partnership (Powys Health Social Care and Well Being Strategy)
- Powys Environmental Partnership
- Powys Regeneration Partnership

3.1.5 The plan sets out 5 priorities for improvement that will guide the work of strategic partners until at least 2017. It describes the issues that are important to Powys and provides a clear picture of how partners will tackle them.

- Integrated health and adult social care
- Children and young people
- Transforming learning and skills
- Stronger, safer and economically viable communities
- Financially balanced and fit for purpose public services

3.1.6 Under the 5 priorities identified are ten outcomes and associated actions to deliver them. Nonetheless, the actions identified are not an all-inclusive list, but instead focus upon those areas that have been prioritised for most significant changes and improvements over a 3 year period. The outcome and its associated actions that best relates to this topic is as follows:

- *Bringing people together in Powys so they feel that they matter, belong and can contribute to their community*
- Align the Local Development Plan to ensure it provides a sustainable infrastructure that underpins the delivery of the One Powys Plan.
- Implement a revised Regeneration Strategy to improve the economic wellbeing of Powys.

3.2 *Powys Regeneration Strategy*

3.2.1 The Powys Regeneration Strategy provides a framework within which the County Council and its partners will ensure that regeneration is embedded into everyday practice, to deliver outcomes which will have a positive impact upon not just the physical, social, environmental, but the economic and cultural attributes of the county as well.

3.2.2 It is based around a vision that:
"*Regeneration in Powys will nurture and promote the County's assets and strengths as the means to addressing its weaknesses, by establishing a robust and sustainable economy that is based upon vibrant communities, and which enhances and protects the physical, social and cultural environment of Powys."*

3.2.3 The Vision is to be realised and supported by *Regeneration Objectives,* which will create a clearer decision making framework for Powys County Council. The regeneration objectives that are relevant to the content of this paper include:

Objective 1: Green Powys
The natural and built environments of Powys are key assets and every opportunity will be taken to sustain and enhance these attributes for the benefit of current and future generations of residents and visitors.
Objective 2: Skilled Powys
High quality training and learning opportunities will ensure that Powys' communities have the skills and qualifications that will enable them to lead happy, productive and prosperous lives.
Objective 3:Resilient Communities
The County's communities will become more resilient, supportive and healthy.
Objective 4: Economic Development
Powys will prosper from a diverse economy where all businesses, are able to benefit from excellent training, business support and high speed digital connections.
Objective 5: Access to Services
Powys residents will have access to a choice of services from a range of integrated agencies and community organizations.

3.2.4 In order to guide the delivery of the Vision and Objectives, 11 Regeneration Priorities have been developed and are specific areas of focus for activity. The priorities of specific relevance to this topic paper include:

- *Facilitating the renaissance and resilience of Powys' town and village centres*

The Regeneration Strategy specifically identifies that one of the most prominent assets of Powys is the distinctive quality of its town and village centres and that it is important that these qualities are emphasised to sustain, maintain, enhance and improve them.
The Strategy therefore proposes the development of "Whole Town Strategies" for towns which will demonstrate what can be achieved when stakeholders work together. Typical outcomes envisaged include:
- promoting a certain niche for each town centre;
- the rejuvenation of a Chamber of Trade;
- the development of locally based loyalty cards;
- retail innovation and improvement;
- the introduction of town centre websites;
- creation of a programme of regular events; and
- the promoting/resisting of new development

The Strategy also advises that an action plan be devised to reduce unnecessary clutter in towns, and that the LDP be used to protect the vitality and viability of town centres through appropriate promotion and protection of town centres for and from development.

- *Supporting Powys' Economy*

The Strategy highlights the importance of securing a resilient economy for Powys, putting this as a high priority. In this regard the strategy also identifies that, because the Powys economy is largely founded upon agriculture and a diverse community of micro-businesses it has been described as the second most resilient economy in Wales.

3.2.5 The delivery of the Strategy centres on a three year Action Plan, which summarises the actions and recommendations of the strategy. This effectively details the ‘quick wins’ and provides some targets for each of the regeneration priorities. The current action plan is for 2014-17 and, in relation to this paper, includes the following areas of activity and outcomes:

Area of Activity	Outcomes
Improve connectivity – Enable Powys' organisations to make the most of the roll-out of high speed fibre broadband.	Support the roll-out of high speed fibre broadband and mobile broadband across Powys. Lobby to improve mobile phone coverage in all parts of the county including 3G and 4G Business focused training and implementation support to develop awareness and foster take up. Raising workforce awareness, skills and engagement in new and emerging opportunities e.g. in design and prototyping.
Develop and foster enterprise in both existing and new enterprises. Increase profitability and the GVA of Powys.	Continued proactive support and promotion of the benefits of starting a business in Powys. Active promotion of business management and leaderships skills to meet existing need and to address the increase in business closures over recent years. Ensure access to a range of finance support and products for existing and potential businesses in Powys. Encourage and support private sector investments.
Business-led pilot scheme to support jobs and the economy in Powys as part of the Welsh Government initiative.	Establish the Sirolli model of community based economic development in and around Newtown to support new business start-ups by nurturing local people through mentoring and enterprise facilitation.
Assist businesses to utilise the opportunities and maximise the economic benefit generated by the local culture and heritage	Make businesses aware of the opportunities generated by the local culture and heritage. Engage in business support activities focussing on opportunities in relation to local culture and heritage
Vibrant and Viable Towns.	Pilot project focussing on two towns within Powys. These being Newtown and Rhayader.
Get Powys Fit for Funding!	Develop 4 town/area focussed regeneration groups - local action plans and delivery mechanisms to make ready for potential community funding.

3.2.6 With respect to the Vibrant and Viable Towns Area of Activity identified above, the pilot project focussing on Newtown and Rhayader has resulted in the production of a “Powys High Street Feasibility Report” (led by Hyder Consulting, supported by Miller Research, on behalf of Glasu). This report considers a variety of high street regeneration options with a view to developing potential models for the future of Newtown and Rhayader that will sustain, maintain, enhance and ultimately improve the towns with support from their local communities. Four specific ideas are considered in detail in the report, namely:

- Meanwhile Uses
- Local Loyalty
- Online Purchasing System; and
- Wicki-town: High Street Wi-Fi & QR Codes

However, the report has also considered future activity within a wider context for reimagining the high street and concludes by identifying a few important tasks for Newtown, Rhayader and, alongside these individual town programmes, a County-wide Powys High Street programme, as follows:

Newtown: *Partnership working* – Shared Vision and Agenda for Change
Awareness Initiatives – Branding (Town Centre Brand), Web-site (Enhanced Town Council site) & QR Heritage Trail
Place Initiatives – Meanwhile Uses (re-occupation of empty shops) & Sense of Place (signage & information)

Rhayader: *Awareness Initiatives* – Branding (Town Centre Brand)
Place Initiatives – Meanwhile Uses (re-occupation of empty shops) & Sense of Place (signage & information)

Powys High Streets: *High Street Branding* – Emphasising distinct nature of towns and reinforce their role and purpose
Local Loyalty – Setting out the benefits of buying local
Pop-Up Powys – Re-occupation of empty space / Meanwhile Uses project
Sense of Place – Action plans for individual town centres to improve look & feel of centres

3.3 *Powys Local Development Strategy*

3.3.1 The Rural Development Plan (detailed in section 2.16 of this paper) is important to the future economic and social development of the County, particularly as since 2007 Powys has been the only predominantly rural County in Wales not qualifying for Convergence status. The purpose of the Powys Local Development Strategy (LDS) is to set out strategic objectives for Powys between 2014 and 2020 as the basis for delivering activity under the Rural Development Plan. The LDS is therefore an important vehicle for achieving the economic development ambitions of the Welsh Government within Powys.

3.3.2 For the 2014 – 2020 period, a new Local Action Group has been formed, the One Powys Local Action Group (OPLAG) to develop the LDS. The membership of the OPLAG has been drawn from the current Powys Regeneration Partnership and Glasu Local Action Group plus new members ensuring representation from all sectors. The long term vision for OPLAG is that:

"By 2020 we aim to see vibrant, empowered and connected local communities, delivering sustainable and innovative solutions to current and

future economic, social and environmental issues, to enhance the economic wealth of the County"

3.3.3 OPLAG have identified a number of objectives that combined seek to add value to the County's assets, supporting the ability to build on the strengths of the County's communities and natural environment.
The OPLAG objectives are:
1. Encourage enterprise and entrepreneurship
2. Capitalise on our natural and human resources
3. Optimise collective strengths and assets to develop community solutions
4. Build and broker skills
5. Collaborate, cooperate, communicate and co-produce

The first three objectives encapsulate the results and outcomes of investment and intervention with the latter two objectives being the tools to develop and support those initiatives.

3.3.4 Whilst initiatives under the LDS are still being established, the framework for the medium term Action Plan for 2015 – 2018 is:

- Encourage enterprise and entrepreneurship
    - Pilot projects utilising the natural environment to provide training and employment opportunities
    - Develop business partnerships to develop new ideas that maximise opportunities within the uplands natural environment to improve economic wellbeing
    - Develop new activities related to the natural environment and heritage
    - Develop activities that link producers, visitors and products together
- Capitalise on our natural and human resources
    - Pilot new outdoor activities and cultural and heritage focussed activities with communities using the promotion of loops and links between villages and towns
    - Research possible pilot activities that develop the Welsh language and link to outdoor activities
    - Develop innovative activities that deliver bi-lingual childcare services
    - Build the green credentials of Powys for living, working and leisure
    - Work with educational establishments to develop innovative new products or processes for local materials
- Optimise collective strengths and assets to develop community solutions
    - Facilitate community engagement to identify resilience and capacity to enable new initiatives that could/will provide local services and activities
    - Identify the potential for transfer of community assets and support implementation
    - Provide support to pilot community hub initiatives
    - Using existing toolkits (Community Pathways) develop a programme of activity that supports community energy development and enhances existing schemes (Welsh Governments Resource Efficiency Service).
    - Develop innovative ways of sharing information using technology
- Build and broker skills
    - Undertake and audit of skills and expertise that could be used for Mentoring and the exchange of best practice

- Develop Mentoring programmes to enable individuals to become more entrepreneurial and innovative
- Investigate feasibility of the development of skills banks
- Collaborate, cooperate, communicate and co-produce
  - Mapping of all significant events in Powys
  - Visits to successful activities within other rural settings to learn best practice
  - Audit potential and then pilot innovative approaches to supply chain development with all sectors

This framework is seeking to put in a strong infrastructure to develop local communities, businesses and service providers to work alongside each other, recognising their collective responsibilities and identifying collaborative solutions. It aims to build a firm foundation for people, businesses, networks and the processes that will support their co-operation and envisages a sustainable County being built upon investing in stronger communities, utilising the assets and skills for collective benefits and recognising that progress can be achieved by realising economies of scale and shared learning.

3.4 *Western Valleys Strategic Regeneration Area*

3.4.1 As detailed above, the *Framework for Regeneration Areas* document identifies that the “Western Valleys” (including the community of Ystradgynlais in Powys) is a Strategic Regeneration Area.

3.4.2 The Western Valleys is an area very much identified with its history of heavy industry in mining, steel and chemicals and today still suffers from the decline of these industries. It has been identified as an area where a more strategic, long-term and holistic approach to regeneration is required. This approach is to be provided by the Western Valleys Strategic Regeneration Area, the long term aim of which is to ensure a sustainable future through economic development, improving skills levels and training opportunities, stimulating job creation, raising housing standards, tackling economic inactivity, developing better transport links and promoting the highest quality of health care. An integrated programme of significant regeneration activity is proposed to ensure this long term sustainable future.

3.4.3 The Western Valleys SRA Strategy “*Strategic Regeneration in the Western Valleys – Bringing Added Value through a Sub Regional Approach to Sustainable Regeneration*” (March 2009), identifies the vision for the area as follows:

“By 2015 the Western Valleys will embrace a network of distinctive, vibrant, sustainable communities that are confident and secure in themselves and with their relationship to the wider world.

Communities that are sustained by an increasing culture of self reliance and enterprise in which everyone can fulfil their greatest potential by linking communities with opportunities, whilst protecting their first class environment”.

3.4.4 The themes for investment (framework for regeneration) identified in the SRA Strategy are as follows:

- Economic Investment (Business Development & Enterprise / Tourism / Jobs, Inactivity and Worklessness / Transport and Connectivity / Perceptions and Confidence)
- Environmental Improvement (Physical Environment / Housing / Green & Blue Infrastructure)
- Social Legacy (Health / Skills & Learning / Family & Individual Support Inititiatives / Community Safety / Communications & ICT / Community Infrastructure & Governance)

3.4.5 Under these strategic themes a number of strategic projects / initiatives have been undertaken. Those specific to Ystradgynlais, and of relevance to this topic paper, are as follows:

3.4.6 *Ystradgynlais Town Centre Masterplan*

Ystradgynlais Town Centre Masterplan (September 2010) has been produced by Hyder Consulting with the aim of strengthening the vitality and viability of the town centre. Included within the study are the issues of public realm improvements, signage / information, bus terminus, Welfare Hall enhancements, car parking, infill development opportunities, street market, marketing & promotion and business support. The Masterplan presents an integrated programme of improvements for Ystradgynlais Town Centre, including:

- the identification of five sites with existing or future development opportunities (including land adjoining the Welfare Hall, the Coleg Powys Site and Ynyscedwyn Primary School);
- priority shop front improvements; and
- the review of the retail core area (as identified in the Unitary Development Plan) as part of the Local Development Plan preparation process;

3.4.7 *Swansea Valley Area Regeneration Plan*

Western Valleys SRA investment was also targeted on an area, as well as strategic, basis.

As the Western Valleys is made up of 9 distinct valleys, each valley benefits from its own “Valley Area Regeneration Plan” (VARP). These area specific plans provide a better understanding of the issues facing each Valley and enable better targeting of programme resources in tackling these issues.

Opportunities detailed in the VARP to address the identified issues and needs of the area include:

- Develop regeneration programmes to sustain and strengthen the traditional town centres within the Valley;
- Support rural diversification initiatives;
- Create town and village centres which are of a good quality, distinctive, accessible and attractive; and
- Ensure that each community has access to a balanced range of community services and facilities.

3.5 *Powys Local Growth Zones*

3.5.1 As an alternative approach to enterprise zones that have been identified in other areas of Wales, an innovative Local Growth Zones (LGZs) approach has been implemented for Powys.

3.5.2 The Powys LGZs initiative is an example of how partners committed to the regeneration of places can develop the strategies required. Under this initiative the Council, Welsh Government and the business community are now working together to deliver recommendations within the Powys LGZs report.

3.5.3 The report recommends that Powys' LGZs be established in the following locations:

- The Severn Valley (Welshpool / Newtown / Llanidloes)
- Rhayader / Llandrindod Wells / Builth Wells
- Brecon / Bronllys / Talgarth
- Ystradgynlais

3.5.4 The Powys Local Growth Zones report makes two broad and over-arching recommendations that are supported by 38 related and more detailed recommendations.
Key recommendations:

- The Welsh Government takes forward the proposal for Local Growth Zones to help encourage and support jobs and growth in Powys.
- Support is given to the development of business-led initiatives - including the appointment of champions in each of the key market towns of Brecon, Llandrindod Wells and Newtown, to work up and implement action plans, working closely with Welsh Government, Powys County Council and other partners.

3.5.5 The report identifies that in Powys town centres are struggling in the face of economic decline, competition from supermarkets on the edge of town, competition from internet shopping, competition from larger centres outside the county, and little collaboration between the small businesses which make up the majority of retailers in the town centres.
The report therefore proposes that for each of the towns of Newtown, Llandrindod Wells, and Brecon the following additional measures will further strengthen their roles and viability:

- Supporting and funding the establishment of a business-led initiative which will develop Newtown town centre's role as a service centre.
- Supporting and funding the establishment of a business-led initiative to more fully develop Llandrindod Wells' role as an event and conference centre, and its role as a heritage tourism centre
- Supporting and funding the establishment of a business-led initiative to more fully develop Brecon's role as a tourist centre, and its role as a boutique or niche shopping location

3.5.6 Specific initiatives that are identified in the report for consideration in each of the 3 town centres include:

- Protecting town centres from the impact of out-of-town retail developments
- Promoting good practice
- Using office and work-place development to increase footfall
- Developing town centre plans
- Supporting local champions and putting in place “Town Teams”
- Changing business rates
- Removing unnecessary trading regulations
- Implement free controlled parking schemes
- Enabling easier change of use for key properties

Actions that are currently taking place, include:

- An Economic Regeneration Plan for Llandrindod Wells;
- The use of the Sirolli model of community-based economic development in and around Newtown and the Severn Valley;
- A network local website which provides wide ranging information on local services, enabling local traders to communicate and interact with their customers to help increase trade for local businesses; and
- Superfast broadband deployment for key settlements within the Zones.

3.6 *Severn Valley Strategic Regeneration Programme*

3.6.1 As the Central Wales Spatial Plan Area Group identified the Severn Valley as a key ‘cluster’ within the Central Wales Spatial Plan Area Strategy, the Mid Wales regional office of the Welsh Assembly Government and Powys County Council developed an integrated regeneration scheme for the area to further improve the economic competitiveness and growth of the Severn Valley. The Severn Valley Strategic Regeneration Programme, was a £6.9million programme launched in October 2009 with funds from the Welsh Assembly Government, Powys County Council and the European Union’s European Regional Development Fund.

3.6.2 The Severn Valley Strategic Regeneration Programme (SVSRP) implemented a series of integrated regeneration projects over a period up to the end of 2014 aimed at strengthening the economic competitiveness of the area and creating the conditions where businesses want to invest and grow and where people want to live and visit.

3.6.3 The SVSRP consists of 3 distinct elements:
(i) Employment Site Development and Servicing
This involves the acquisition & site servicing of development land at the Offa’s Dyke Business Park at Welshpool and site servicing of land at Abermule Business Park.
This element of the SVSRP will facilitate the future provision of business premises by both the public and private sectors by providing an additional 10 acres of fully serviced employment land for development.
The units, when developed, will be mainly office and light manufacturing units (B1).

(ii) Built Heritage Scheme
This scheme provided funding to support improvements to the external fabric and appearance of business and commercial properties of heritage interest within the Severn Valley. Such support assists new and existing businesses, enhancing the vitality and viability of the Severn Valley by encouraging inward investment.
(iii) Environmental Enhancement Scheme
This project focused specifically on the three key towns of Newtown, Welshpool, and Llanidloes. It provided selective capital investment to achieve physical improvements to the built environment, which in turn contributes to the regeneration of the Severn Valley by enhancing the vitality and viability of town centres, thus supporting the development of new and existing businesses and increasing their attractiveness for tourists.

3.6 *The Cambrian Mountains Initiative*

3.6.1 The Cambrian Mountains Initiative is a wide-ranging project that aims to help promote rural enterprise, protect the environment and add value to products and services in Mid Wales.

3.6.2 The guiding principles of the initiative are:
- Encouraging vibrant rural communities
- Adding value to traditional family farms
- Maintaining valuable habitats and eco-systems
- Offering the highest quality farm products and services
- Caring for the natural and built environments
- Connecting consumers with the countryside
- Supporting rural tourism

3.6.3 A number of work streams are being undertaken as part of the Cambrian Mountains Initiative, including:
- Ecosystem Services

The Cambrian Mountains Initiative in close partnership with the farming community is experimenting with, and identifying new approaches to, sustainable multi-purpose land management in the uplands (Ecosystem Services delivery). The aims are to demonstrate integrated and sustainable rural development in a rural setting. The Initiative is seeking to raise the quality of the landscape and to connect its people with their environment, influencing them to adopt lifestyles to safeguard it better.
- Redundant Rural Buildings

Work is being undertaken to characterize the farm buildings of the region as, compared to many other building types they are comparatively poorly understood. The project, managed by The Prince’s Regeneration Trust, takes an overview of the surviving stock of farm buildings and draws out themes and patterns in the built heritage. It seeks to identify the buildings most at risk and those where there might be opportunities for repair or adaptive reuse.

3.7 *The Dyfi Biosphere*

3.7.1 The Dyfi Biosphere reserve was designated in 2009, after receiving formal recognition from UNESCO. The purpose of biospheres is to promote sustainable development based on local community efforts and sound science.
Each biosphere reserve is intended to fulfil three complementary functions:

- a **conservation** function, to preserve genetic resources, species, ecosystems and landscapes;
- a **development** function, to foster sustainable economic and human development, and
- a **logistic support** function, to support demonstration projects, environmental education and training, and research and monitoring related to local, national and global issues of conservation and sustainable development.

3.7.2 The Dyfi Biosphere covers an area of 759 km^2 however not all of this is in Powys, parts of Ceredigion, Snowdonia National Park and Gwynedd are also included within the reserve. Those areas within Powys include Machynlleth, Llanbrynmair and Glantwymyn and Cadfarch wards.

3.7.3 The Dyfi Biosphere reserve's key objectives that relate to the retail economy are:

- To keep and improve the area as a great place to live, work and bring up children - and to create more opportunities for them to stay here
- To develop a more self-reliant local economy; less dependent on fossil fuel, with growth driven by local knowledge and resources
- To develop a more sustainable area; with residents and visitors choosing locally-produced goods more often and reducing our impact on the world
- To use the Biosphere 'brand' to promote the quality of local agricultural & other products and tourism experiences

4.0 Retail and Town Centres in Powys

The policies and proposals relating to retail and town centres contained within the Powys Local Development Plan must be based on a sound understanding of the issues facing Powys' town centres and its retail economy, including any trends and influences that may have implications on the demand for future retail provision. Key messages in this regard are included within a number of strategic documents, including most significantly:

- The Wales Spatial Plan - Central Wales Area Strategy;
- The One Powys Plan;
- The Powys Regeneration Strategy; and
- The Powys Unitary Development Plan

4.1 *The Wales Spatial Plan - Central Wales Area Strategy*

The Wales Spatial Plan - Central Wales Area Strategy identifies:

- That the area is characterised by a number of factors associated with a predominantly rural area and a dispersed low-density population including peripherality, low wages, a restricted range of opportunities, distance from major economic markets and an insufficiency of population critical mass to attract providers of new infrastructure links.
- Substantial parts of the area suffer from poor access to jobs and services, possessing relatively weak internal and external links, poor public transport and limited levels of rail accessibility, with the exception of a few centres including Welshpool and Newtown. This has led to high dependency on car and road-based transport, which, combined with inflationary pressures on fuel prices has highlighted significant rural issues around fuel poverty.
- The rich mosaic of towns and villages is important for employment, social and recreational activity and to access a wide range of services. In such a diverse area, it is important to recognise the interaction between places of varying sizes and their mutually supporting roles in providing access to services.
- The need to maintain and support the distinctive character of our Welsh historic environment, without compromising society's present and future needs. High standards of design will play a major part in protecting sense of place in relation to the natural and built environment of the Area. Conserving and celebrating the Area's heritage and development in terms of sites, buildings and people is an important aspect of this as is the redeployment of redundant buildings.
- Central Wales cannot view itself in isolation as people access employment, services, shops or leisure facilities in other parts of Wales or the UK.

4.2 *The One Powys Plan*

Joint Needs Assessments were prepared to inform the preparation of the One Powys Plan. These assessments identify:

- With its sparsely populated upland landscape and poor connectivity with the cities of England and Wales, Powys has no large employers outside the public sector. The majority of businesses are small and there are many one person enterprises. With so many self-employed in Powys a key challenge is to foster business-start-ups, to continue to support sustainable businesses and in particular to encourage growth in the green enterprise sector.

- Agriculture continues to be the largest primary production industry in Powys, predominated by small family-run upland sheep farms. Farming and forestry have shaped the landscape, culture and people of Powys for centuries although much of the land is classified as disadvantaged. The nature of agriculture in the county has changed dramatically over the past century due to factors such as the rural exodus from the 1900's to the 1970's, the WWII mechanisation of Welsh farming and the subsidies brought in under the European Common Agricultural Policy from the 1950's to date. Compared with a century ago the Powys countryside is more sparsely populated, with fewer farms and fewer agricultural jobs, while farm diversification into activities such as tourism has become common place. However, new drivers have the potential to reinvigorate the small farm economy in the coming decade, with re-localised labour force and markets for their produce, including: -
  - fossil fuel price rises;
  - biomass and carbon sequestration markets;
  - growing consumer demand for locally grown food;
  - innovations in land-use such as community-supported agriculture; and
  - national concerns about food security
- The inability to access a range of services considered necessary for day to day living is a key determinant of deprivation and has a significant impact on individual's health and well-being. Given the geography of the county, this issue is particularly acute in Powys. Rural deprivation research studies have observed that transport is a major issue for the excluded and deprived. In areas which lack both local services and public transport, private transport is a necessity forced upon all households, including those in poverty, for reaching the distant services and workplaces. Furthermore, significant population groups are not able to drive a car and they are always disadvantaged where there is no public transport.
- As we enter the post Peak Oil era, the cost of transporting food will become more and more costly. The costs of oil based agricultural inputs are also rising. It will be important in the future to produce and distribute as much food as possible locally, to rapidly reduce dependence on fossil fuel inputs and to protect the most vulnerable Powys residents from these impacts.

4.3 *The Powys Regeneration Strategy*

This strategy provides a brief summary of the geographic, demographic and economic context of the county, and includes the following points:

4.3.1 *Geography*

- Powys is an extensive, largely upland and extremely rural county covering over 5,000 square kilometres of the centre of Wales (approximately one quarter of the area of Wales). Powys is a land-locked county at the centre of Wales. Its long boundary with England to the east adjoins Shropshire and Herefordshire and it borders 11 Welsh counties to the north, south and west.

- Powys' fine natural and historic features make it a popular destination for visitors who enjoy nature and outdoor activities. These natural attractions include Victorian towns, castles and other heritage features.
- The geographical nature of Powys and the fact that there are no motorways and few dual carriageways has implications for accessibility and access to key services.
- Generally travelling distances for residents is greater, the cost of which will be impacted by the increasing cost of fuel.
- Some rural areas do not have access to broadband internet and suffer from a lack of mobile phone coverage which restricts the ability to dispense information and services via the internet and affects business location and the ability of people to work from home.

4.3.2 *Demography*

- Powys is the most sparsely populated county in England and Wales.
- Limited higher education opportunities, a perceived lack of employment opportunities, poor access to services, and relatively high house prices is leading to the out-migration of the younger, economically active population.
- The quality of life that Powys offers is attracting a significant number of older people to the area and life expectancy is increasing resulting in an average age above the national average (44.0 in Powys in 2008 compared to 40.9 in Wales). In Powys in 2008 21.6% of the population were aged 65 and over compared to 18.0% in Wales as a whole.

4.3.3 *Economy*

- Powys has a relatively narrow economic base focused predominantly on agriculture and tourism with a high level of self-employment and many small businesses.
- The average weekly income in Powys is lower than the Welsh average (£370.80 per week in Powys compared to £421.00 per week in Wales, 2008). Combined with the general greater cost of living in rural areas compared to urban areas, the lower levels of income experienced in Powys can contribute to social exclusion.

4.4 *Powys Unitary Development Plan (2001-2016)*

4.4.1 The current development plan for the Powys Local Planning Authority area is the Powys Unitary Development Plan (UDP), which identifies that Powys is a large rural County and that retail provision in the County is focussed upon the historic market towns in the County, such as Builth Wells, Llandrindod Wells, Machynlleth, Newtown and Welshpool. These market towns provide a wide range of shops and services to residents, the wider community and visitors to the area. The UDP further identifies that, given the rurality of the County, local village shops, sub-post offices, pubs and farm shops have an important role in supporting the vitality and viability of rural villages, providing easy access to basic provisions (especially for those with limited mobility) and provide an important focal point for rural village life.

4.4.2 As detailed within section 2.0 (above) *Planning Policy Wales* advises local planning authorities to establish the existing hierarchy of centres, identifying those which fulfil specialist functions and be clear about their future roles, including the identification of locations for expansion and, where necessary, measures to reinvigorate centres or to manage decline in the relative importance of a centre as other centres expand. In this regard the adopted Powys Unitary Development Plan identified a Retail Centre Hierarchy for Powys consisting of 4 tiers of provision determined essentially by the following factors:

a) the number, type and range of shopping services provided by the centre;
b) the character and attractiveness of the centre;
c) the size of its catchment area; and
d) accessibility by a means of different transport modes

The 4 tiers in the retail hierarchy for Powys were identified as:

- *Area Retail Centres*

The largest retail centres and settlements in Powys, characterised by having a well-defined town centre, containing a wide range of retail outlets financial and professional services, both nationally and locally owned. They serve not only their resident population, but also a wide catchment area due to the nature of retail facilities and services they offer.

Area Retail Centres identified in Powys are Builth Wells, Knighton, Llandrindod Wells, Newtown, Welshpool, Ystradgynlais (Brecon – Brecon Beacons National Park (BBNP)).

- *District Retail Centres*

Market towns that provide significant retail facilities for their immediate hinterlands and for visitors to the area but do not perform the wider role of Area Retail Centres. They have a good range of shops and services but with few national retailing companies represented.

District Retail Centres identified in Powys are Llanidloes, Machynlleth, Presteigne, Rhayader (Crickhowell and Hay – BBNP).

- *Local Retail Centres*

Smaller towns or larger villages, with lesser catchment areas, generally characterised by either a very compact retail area or a dispersal of several shops. They offer a limited range of facilities and services, including banking and postal services, many of which are essential for day to day basic needs and for the successful operation of local businesses.

Local Retail Centres identified in Powys are Llanwrtyd Wells, Llanfair Caereinion, Llanfyllin, Montgomery (Talgarth – BBNP).

- *Neighbourhood and Rural/Village Shops*

Individual shops providing an important function at the local neighbourhood level within towns, small villages, and the more isolated areas of Powys. This category also includes pubs and filling stations, which can act as essential outlets for basic daily provisions and services. These centres have the smallest catchment areas, generally only serving local communities and villages within their immediate surrounding rural area, or the incidental passer-by.

4.5 *Powys County Council Retail Study (January 2006)*

4.5.1 In order to inform and support the policies and proposals contained within the UDP an assessment of the retail needs of the County (excluding Brecon Beacons National Park) was produced by Nathaniel Litchfield and Partners for Powys County Council in January 2006. The main objectives of the study were to:

- Establish the comparison and convenience retail floorspace requirements up to 2016 for the County;

- Assess the vitality and viability of all Area and District Retail Centres based on the criteria provided in Planning Policy Wales and TAN 4; and
- Identify the capacity of the Area Centres in Powys to accommodate retail growth.

4.6 *Powys County Council Retail Study (September 2012)*

4.6.1 The 2006 Retail Study recommended that it be updated "in 4 – 5 years' time" (i.e. in approx. 2011-12). The 2006 Study has therefore been updated as part of the evidence gathering stage of the Local Development Plan's preparation to provide up-to-date information on the retail needs of the Plan area. The updating exercise undertaken has had regard to issues such as:

- the current economic climate and future projections;
- the appropriateness of the existing retail hierarchy;
- cross boundary issues;
- major retail developments in the period since 2006 that may have impacted upon shopping patterns in the plan area;
- the impact of additional overheads associated with maintaining retail premises in town centre conservation areas and in listed buildings; and
- any impacts from the implementation of economic regeneration initiatives

4.6.2 Whilst it is not the intention of this paper to reiterate all of the findings of the Study, key messages from the Study's conclusions and recommendations (section 5.0 of the Study) are summarised below:

- *Meeting Shopping Needs in the County*

The retail floor space and expenditure projections within the report are based on low expenditure growth between 2011 and 2013 due to the effects of the recession, but the projections assume a recovery after 2013 in line with previous long term growth trends. The broad floor space projections for the County are therefore identified as follows:

Up to 2016

- Comparison goods 4,100 sq.m net (5,500 sq.m gross);
- Convenience goods no additional floorspace;

2016 to 2021

- Comparison goods 6,700 sq.m net (8,800 sq.m gross);
- Convenience goods 1,400 sq.m net (2,000 sq.m gross);

2021 to 2026

- Comparison goods 7,600 sq.m net (10,200 sq.m gross);
- Convenience goods 1,300 sq.m net (1,900 sq.m gross).

The study highlights that these floor space figures do not take into account the reoccupation of vacant shop units or any current proposals (except for the convenience goods commitments at Ystradgynlais (Tesco) and Machynlleth (Co-op extension)). It also states that if the comparison commitments at Welshpool Smithfield, combined with the comparison goods floor space within the proposed Tesco at Ystradgynlais and extension to the Co-op store in Machynlleth, are implemented by 2016 (total net comparison goods floor space of 4,113 sq.m), these schemes would absorb all of the comparison goods floor space requirement to 2016 and that development over and above this would therefore need to increase comparison goods expenditure retention rates and the impact of developments will need to be carefully considered. In addition the study identifies that if the recovery is slower than envisaged in the study, then the floor space projections will need to be re-assessed and it would be prudent to adopt a cautious approach until firmer signs of the economic recovery are established.

The report emphasises that meeting the projections between 2011 and 2016 is the priority as longer term forecasts up to 2021 and 2026 are more susceptible to change, due to unforeseen circumstances and projected surplus expenditure beyond 2016 being attributable to projected growth in spending per capita, extrapolated from past growth projections. Therefore, if the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Longer term projections should therefore be monitored and kept under review.

- *Accommodating Future Growth*

The sequential approach suggests that town centres should be the first choice for retail development and the existing stock of premises may have a role to play in accommodating projected growth. The study assumes that existing retail floor space can, on average, increase its turnover to sales floor space densities. The floor space projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth. The study therefore proposes that the strategy should seek to reduce shop vacancy levels from 9.8% to about 5%, and these reoccupied units could accommodate about 4,000 sq.m gross of commercial space ie. Classes A1 to A3. However, the study also identifies that:

Growth in sales densities and vacant shops will not be able to accommodate all the future growth in retail expenditure, therefore potential development sites need to be identified through the Local Development Plan process to accommodate growth up to and beyond 2016.

- *Convenience Goods Development*

The study identifies that the quantitative capacity analysis indicates there is no requirement for additional convenience goods floor space within the County up to 2016, but there is a requirement of 1,390 sq.m net (1,986 sq.m gross) by 2021. The capacity figures and qualitative need assessment do not identify any significant need for additional convenience goods floor space over the study period.

The study identifies that most of the floor space capacity identified relates to Knighton and Presteigne, and together with Rhayader and that a medium-sized food store (around 750 sq.m net) could meet the identified need in Knighton, whilst smaller scale convenience goods developments (up to 250 sq.m net) or extensions to existing stores may be appropriate in other centres in the County, particularly Presteigne and Rhayader.

- *Comparison Goods Development*

The study considers that the strategy should seek to concentrate future comparison retail development within Newtown, Welshpool and Llandrindod Wells. The quantitative capacity analysis indicates that in the short to medium term up to 2016 there could be scope for 4,130 sq.m net (5,506 sq.m gross) of comparison floor space in the County as a whole, and this could increase to 10,756 sq.m net (14,341 sq.m gross) by 2021.

Based on existing market shares, expenditure growth up to 2021 suggests that Newtown could accommodate an additional 5,280 sq.m gross of comparison goods floor space by 2021. Welshpool could accommodate 2,891 sq.m gross, however the commitment at Welshpool Wharf would absorb all of this floor space capacity. Llandrindod Wells could accommodate an additional

1,639 sq.m gross of comparison floor space by 2021. Llanidloes and Knighton could each accommodate around 850 sq.m gross additional comparison goods floor space. Within other centres in the County, the projections suggest there will be limited need for further comparison floor space up to 2021 (total of around 2,800 sq.m gross).

- *Scale of Development*

Based on the scale and role of centres within the County and the floor space projections within the study, large-scale development which serves a significant part of the County should be concentrated within Newtown, Welshpool and Llandrindod Wells. For the remaining area and district retail centres, shopping facilities should generally cater for top-up and basket convenience shopping, services and small scale community uses, and are likely to provide a much more limited range of comparison shopping. The exception to this is Knighton, where a medium-sized food store could be accommodated. Other facilities outside the area and district retail centres should only cater for top-up and basket convenience shopping, limited comparison goods shopping and services, and these developments are likely to be local facilities of up to 280 sq.m gross.

The study further proposes that, based on the scale and role of centres within Powys and the floor space projections, the impact of all out-of-centre retail applications of 280 sq.m gross or more and applications within centres of 1,000 sq.m gross or more should be assessed in the County.

- *The Designation of Centres and Boundaries*

The study reviews the current retail hierarchy in the UDP and, on the basis of their size and function, the study suggests that it would be appropriate to classify Newtown, Welshpool, Llandrindod Wells, Machynlleth and Llanidloes as town centres (although town centres could be further divided into Newtown, Welshpool and Llandrindod Wells as main town centres and Machynlleth and Llanidloes as smaller town centres). Ystradgynlais, Builth Wells, Knighton, Presteigne and Rhayader are classified as district centres (although again this could be further divided with Ystradgynlais and Knighton being classified as major district centres). The study concludes that Llanwrtyd Wells, Llanfair Caereinion, Llanfyllin and Montgomery should remain classified as local centres.

- *Review of Centre Boundaries and Frontages*

The study also reviews the UDP's town centre boundaries and shopping frontages. As part of this review the study highlights that TAN 4 defines edge-of-centre sites as a location within easy walking distance of the centre (normally not more than 200-300 metres from existing town centre shops) and that the definition of primary and secondary frontages will depend on local circumstances and may not just relate to the presence of retail units.

However, in respect of town centre boundaries the study identifies that, in practical terms, a 300 metre distance from the boundaries of the centres in Powys will cover a significant area and there is scope to review these boundaries to exclude areas of predominantly residential use, particularly in Builth Wells and Ystradgynlais.

In respect of shopping frontages the study identifies that the UDP frontages for the area retail centres appear to be appropriately defined, however in the larger centres of Newtown and Welshpool, the study considers that secondary frontages should also be defined. The study also considers that primary shopping frontages should be defined in Machynlleth, Presteigne and Rhayader. The study then details the amendments that could be made to the frontages.

- *Review of UDP's Retail Policy Framework*

The retail policy framework in the UDP is reviewed in the study and generally considered appropriate. However, a few amendments are suggested to strengthen the protection of the existing centres, as follows:

- The policy requiring the impact of proposed development should be strengthened, and the LDP policies should require that the impact of all out-of-centre retail applications of 280 sq.m gross or more and applications within centres of 1,000 sq.m gross or more should be assessed in the County;
- Policy should seek to encourage small scale, local retail and service provision, i.e. proposals that fall below the 280 sq.m threshold should generally be supported in local centres, villages and rural locations;
- Policy should be included that seeks to protect the amount of Class A1 use within primary shopping frontages of centres (e.g. no more than three units or 33% of frontage occupied by non-Class A1 use in any 10 shop consecutive units, and no more than 2 adjacent units should be in non-A1 use). It is suggested that the policy could also include criteria relating to the retention of a shop frontage/widow display, to seek to maintain the vitality and viability of the centre; and
- Policy resisting the loss of local shops and services, unless it can be satisfactorily demonstrated that maintaining the use would not be viable could be more flexible to allow alternative uses, in order to prevent properties remaining vacant.

4.6.3 The study concludes by stating that its recommendations and projections are expected to assist in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development up to 2016, with longer term forecasts up to 2021 and 2026. However, given the limited short term need identified, the study states that there may not be a requirement for any land allocations to accommodate retail floor space requirements and that this could be met through small scale developments.

The study also highlights that projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available. In particular it states that long-term projections up to 2026 should be treated with caution and it therefore recommends that the retail study should be updated in 4-5 years and the floor space projections rolled forward. In this regard the study identifies that the following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections

will need to be updated at the same time as expenditure and population figures);
- existing retail floor space and average turnover to floor space densities (floor space surveys and turnover data from Management Horizons, Retail Ranking); and
- implemented development within and around the study area.

4.7 Powys County Council Retail Study - Addendum 2015

4.7.1 During consultation on the Powys Local Development Plan from July – September 2014 issues were raised in respect of the evidence base supporting the Plan including ensuring that the retail evidence is suitably in sync with other evidence base documents and the LDP growth strategy. The 2015 Addendum to the 2012 Retail Study therefore updates and supersedes aspects of the 2012 Study and is structured as follows:
- Recent Changes and Trends;
- Retail Capacity & Quantitative Need Assessment; and
- Retail Strategy & relationship to the overall Growth Strategy

4.7.2 Key messages from the Addendum include:
- Recent Changes and Trends

The addendum has revised down the longer term forecasts (to 2026) of convenience and comparison goods expenditure per person in Powys.
New forms of retailing continue to grow as an alternative to more traditional forms of shopping and will continue to have an effect on retailing in the high street and from traditional stores. Recent trends suggest continued strong growth of on-line shopping, however the addendum identifies that if retailers operate on-line sales from their traditional retail premises then on-line sales may not always mean reductions in need for retail floor-space.
- Retail Capacity & Quantitative Need Assessment

The addendum has revised down the baseline convenience goods spending within the study area from 12.1% (2012 Study) to 3.1%, due to lower expenditure and population forecasts.
The addendum has revised down the baseline comparison goods spending within the study area from 89% (2012 Study) to 57.4%, due to lower expenditure and population forecasts.
There is no quantitative need to revisit the Deposit LDP approach of not allocating sites for convenience goods floor-space. Where quantitative capacity has been identified in a centre the most appropriate location to accommodate this need is within the existing centre. However, one exception to this is Presteigne and Knighton where a qualitative deficiency in Presteigne could be addressed by allocating some future retail capacity from Knighton to Presteigne.
With regard to comparison goods floor-space there is no need for the deposit LDP to allocate additional sites for retail floor-space.
- Retail Strategy & relationship to the overall Growth Strategy

The quantitative and qualitative assessment of the potential capacity for new retail floor-space suggests that the Local Development Plan should not look to make any retail allocations which are based on quantitative capacity established for beyond 2021. Longer term need, to 2026, can be considered

as part of a Local Development Plan review and will be the most robust way of planning for future needs.
There is a qualitative deficiency within the district centre of Presteigne which is likely to lead to a leakage of expenditure from Presteigne to Knighton for convenience goods shopping. There are therefore sustainable benefits from providing a more local food-store in Presteigne.
The sequential approach suggests that designated town centres should be the first choice for retail and leisure development.
The Deposit LDP and Retail Study 2012 set out a three tier retail hierarchy across Powys which is considered to provide a good coverage of the County and is therefore considered adequate. The Strategy follows the “pro rata approach” of the housing growth strategy with growth based on existing market shares (with the exception of Knighton and Presteigne, where it is considered appropriate to claw back leakage of expenditure from Presteigne that is currently spent in Knighton, so that the future expenditure growth is more closely aligned to the area from whence it has been generated).
The existing stock of premises will be able to play a role in accommodating projected growth through growth in sales densities and vacant shops being brought into re-use.
The short term priority post-recession should be the re-occupation of vacant floor-space, but this should not preclude investment within appropriate town and village retail centre locations.

4.7.3 The 2015 Retail Study Addendum has updated the 2012 Study and in doing so reinforces conclusions within the original study and the approach subsequently taken within the Plan relating to the overall retail strategy and hierarchy, with a pre-cautionary approach taken to the allocation of land for retail uses in order to ensure the viability and vitality of existing centres, including the need to re-occupy vacant premises.

5.0 Drivers of Change

In order to ensure that the retail and town centre policies and proposals contained within the Powys Local Development Plan are appropriate it is important that we identify any potential ‘Drivers of Change’ and associated significant implications for the future of Powys’ retail sector and retail centres. Drivers of Change currently identified include:

5.1 *Online Shopping*

5.1.1 The emergence of online shopping in recent years as an alternative to traditional forms of shopping has significant implications for retailing in Powys. Whilst it has the potential to divert expenditure from existing shops within the County it may also provide benefits and opportunities in terms of providing services to those with poor shop accessibility (e.g. those in certain rural areas) that would otherwise lack such provision. It may also provide employment opportunities in the County associated with the distribution of goods, including opportunities in specialist distribution warehouses or existing retail premises that expand to operate on-line sales.

The 2012 Retail Study for the County identifies the emergence of online shopping and its rapid growth since the late 1990’s and states (in para. 3.6) that whilst “recent trends suggest continued strong growth in this sector … there is still uncertainty about its longer-term prospects and the potential effects in the high street”. Nonetheless, given the rapid growth in this sector of retailing it is anticipated that it will have significant implications for retailing within the Plan area, including retail floor space and impacts upon the vitality and viability of retail centres.

5.2 *Transition Towns*

5.2.1 Transition Towns is a community led initiative that promotes sustainable living including reducing dependence on fossil fuels for essential items. Transition Towns within the Local Development Plan area include Llandrindod Wells, Machynlleth, Presteigne and Rhayader (emerging).

The initiative seeks to improve the sustainability credentials of a town through the implementation of projects focussing on reducing the use of fossil fuels. With regard to retailing this includes reducing the need to travel for goods and increasing the production and consumption of locally produced food.

5.3 *Climate Change & Volatile Fuel Prices*

5.3.1 There is wide spread consensus that the climate is changing as a result of man’s activities, and the rate of change is unprecedented. This is the view of the overwhelming majority of scientists with expertise in climate, environment and ecology. It is against this backdrop that the National Assembly for Wales produced *“WALES Changing Climate Challenging Choices – The impacts of climate change in Wales from now to 2080”* (February 2000). This document identifies that economic planning needs to take account of the worldwide impacts of and adaptations to climate change.

5.3.2 In addition, the volatility of fuel prices has a number of potential impacts upon the economy of Powys, including:

- A greater priority being placed on reducing the need to travel - such a priority will impact upon the way in which people choose to work (with the opportunity to work from home or working closer to their homes becoming more attractive), the ways in which they access goods & services (e.g. via the internet) and changes to tourism.

- Changes in the way people travel to access services – there may be an increase in demand for public transport and facilities in retail centres to accommodate alternative means of transport other than the car (e.g. cycle routes / racks and recharge points for electrical vehicles).
- Changes to the agricultural sector - farming will be affected as it is currently heavily reliant upon oil powered machinery and plant. This combined with a rising population means that food production and supply may struggle to meet demands and will necessitate changes in the way food is produced, distributed and its cost to the consumer.
- Increasing energy costs – all sectors of the economy will be affected by the increase in the cost of energy. This will drive the cost of manufacturing and therefore products up. It will also lead to increased interest in renewable forms of energy such as wind turbines and bio-fuels. However, such forms of energy generation will compete for land with other uses including food production.

5.3.3 The emphasis placed upon tackling climate change, coupled with volatile fuel prices, will lead to a greater priority being placed on the local provision of goods and services.

Such a priority will have a significant impact upon Powys which had an estimated population in mid-2012 of 132,952 and covers a quarter of Wales, making it the most sparsely populated county in England and Wales, with just 26 persons per square kilometre (Source: 50 Facts About Powys, 2013 Edition).

6.0 Information / Data Gaps

6.1 Within the first draft of this topic paper a number of gaps were identified in the information and evidence base upon which it was proposed to found Local Development Plan retail & town centre policies and proposals. Therefore, since the first publication of this paper, an updated Retail Study for the Local Planning Authority has been undertaken by Nathaniel Litchfield and Partners (Powys Retail Study 2012). This study provides the fundamental piece of evidence on retailing and town centres in the Plan area and seeks to address any information and evidence gaps identified. In addition, as has been identified in section 4.7 of this paper, the 2012 Retail Study has also been subject of further updating in light of comments and representations on the first Deposit Draft LDP (July 2014). This updating is contained within an addendum to the 2012 Study (published in 2015).

6.2 It is also recognised that additional information / data may be required to meet LDP monitoring requirements, for example:
The Local Development Plan Manual (WG, June 2006) identifies that a Local Development Plan's performance will be assessed against a number of output indicators. In order for some of these indicators to provide a useful assessment a baseline position (pre-implementation of the LDP) may need to be ascertained.
Para. 9.5.4 of the Manual identifies a number of indicators to be included within a Plan's Annual Monitoring Report, including:

- Amount of development permitted on allocated sites in the development plan as a % of development plan allocations and as % of total development permitted (ha and units)
- Amount of new development (ha) permitted on previously developed land (brownfield redevelopment and conversions) expressed as a percentage of all development permitted; and
- Amount of major retail, office and leisure development (sq m) permitted in town centres expressed as a percentage of all major development permitted (TAN 4)

Therefore, further work is proposed by the Local Planning Authority to ensure that sufficient information / data is available to enable the appropriate monitoring of the Local Development Plan's retail policies and proposals in line with the core and local monitoring indicators identified in section 11 below.

7.0 Emerging & Key Issues

Having taken into account the above influences on policy development and having considered the local evidence base we have identified a series of emerging issues relating to Powys' economy which may influence the Local Development Plan's strategy (strategic issues) and its policies & proposals (policy issues).

7.1 *Powys' Retail Strategy*

7.1.1 Paragraph 10.2.1 of Planning Policy Wales advises that the local planning authority should develop a clear strategy for retail development that seeks to achieve vital, attractive and viable centres. Such a strategy should, as part of the LDP vision, be consistent with other aspects of the Plan and the aims of other local authority strategies such as Powys' One Plan and Regeneration Strategy. Key issues / considerations in determining the LDP's retail strategy are therefore:

- Within the One Plan the stated "vision" of the Powys Local Service Board: "We will work together to meet the needs of Powys citizens";
- Powys County Council's vision: refreshed in mid-2014 to "Strong communities in the green heart of Wales", as it was considered that this better addressed the challenge the Council faces in exploring different ways of providing services due to the challenging reduction in funding; and
- Powys Regeneration Strategy's vision: "Regeneration in Powys will nurture and promote the County's assets and strengths as the means to addressing its weaknesses, by establishing a robust and sustainable economy that is based upon vibrant communities, and which enhances and protects the physical, social and cultural environment of Powys."

7.1.2 Other vision statements of interest and therefore consideration include:

- Wales Spatial Plan's vision for the Central Wales Spatial Plan area (see section 2.7.3 of this paper) of: "High-quality living and working in smaller-scale settlements set within a superb environment, providing dynamic models of rural sustainable development, moving all sectors to higher value-added activities"; and
- The long term vision of the One Powys Local Action Group (OPLAG) developing the latest Local Development Strategy (see section 3.3 of this paper) of: "By 2020 we aim to see vibrant, empowered and connected local communities, delivering sustainable and innovative solutions to current and future economic, social and environmental issues, to enhance the economic wealth of the County"

7.1.3 Important messages for the retail strategy to be taken from these vision statements includes the emphasis and importance placed upon nurturing and promoting the County's assets in order to reinforce the area's network of strong, vibrant rural communities, whilst enhancing and protecting the outstanding physical, social and cultural environment. In this regard, as the Regeneration Strategy identifies, one of the most prominent assets to be nurtured & promoted is the distinctive quality of Powys' town/village centres.

7.2 *Retail Development Allocation Requirement*

7.2.1 Planning Policy Wales identifies that Local Planning Authorities should identify sites for retail development in their development plans where there is assessed to be a quantitative or qualitative need using the sequential approach.

7.2.2 In order to ascertain the need for retail allocations in the LDP a Retail Study was undertaken in 2012. The Retail Study sets out broad floor space projections for the County up to 2016, between 2016 and 2021 and from 2021 to 2026. However, the report emphasises that meeting the projections between 2011 and 2016 is the priority as longer term forecasts up to 2021 and 2026 are more susceptible to change and these longer term projections should therefore be monitored and kept under review.
In terms of the projections to 2016 the study highlights that the figures do not take into account the reoccupation of vacant shop units or any current proposals (except for certain commitments at Ystradgynlais and Machynlleth). Nonetheless, it concludes that there is no additional need for convenience goods floor space to 2016 (although it does identify floor-space capacity and qualitative deficiencies in Knighton & Presteigne). It also concludes that, if the comparison commitments at Welshpool, Ystradgynlais and Machynlleth are implemented by 2016, there is no additional need for comparison goods floor space to 2016.
The study identifies that if the recovery from the recent recession is slower than envisaged in the study, then the floor space projections will need to be re-assessed and it would be prudent to adopt a cautious approach until firmer signs of the economic recovery are established.
The study concludes (in section 5.53 of the study) by stating that it provides a broad overview of the potential need for further retail development up to 2016, with longer term forecasts up to 2021 and 2026. However, given the limited short term need identified, there may not be a requirement for any land allocations to accommodate retail floor space requirements and that this could be met through small scale developments.

7.2.3 Aspects of the 2012 Retail Study have been updated and superseded by the publication of a 2015 Addendum to the 2012 Retail Study. Nonetheless, the Addendum to the Retail Study reinforces the findings of the 2012 Study (and therefore the approach espoused in the Deposit LDP published in 2014). In addition, the 2015 addendum reinforces the appropriateness of allocating some retail floor-space within Presteigne as this will be of qualitative benefit to Presteigne and may claw back leakage of expenditure from Presteigne that is currently spent in Knighton, so that the future expenditure growth is more closely aligned to the area from whence it has been generated.

7.2.4 The Powys Local Growth Zones report identifies that Powys' town centres are struggling in the face of economic decline, competition from supermarkets on the edge of town, competition from internet shopping, competition from larger centres outside the county, and little collaboration between the small businesses which make up the majority of retailers in the town centres (see section 3.5.5 of this paper). This paper also identifies and highlights other pressures that existing retail centres within Powys are facing e.g. in sections 7.5 and 7.6 below. Significant emphasis is therefore being placed on the need to reinforce Powys' network of town centres. This paper identifies some of the initiatives that are planned, or have been undertaken, to enhance the vitality, viability and attractiveness of these centres (see section 7.7 below). Whilst the Wales Spatial Plan (see section 2.6.1.2 of this paper) states that "out-of-town retail developments risk undermining the regeneration and viability of town centres as well as contributing to unsustainable traffic patterns". These issues therefore reinforce the appropriateness of the cautious approach espoused in the Retail Study and its suggestion that there may not be a need for retail allocations in the LDP. Nonetheless, Planning Policy Wales identifies (in para. 10.2.12) that as proposals may come forward for development irrespective of whether the plan provides allocations, the Authority's Development Plan should also include a criteria based policy against which such proposals can be judged.

7.3 *Resilience and Renaissance of Powys' Network of Town Centres*

7.3.1 Powys' Regeneration Strategy identifies that one of Powys' most prominent assets is the distinctive quality of its network of market towns & villages and places a priority on facilitating their resilience and renaissance. In this regard, the Wales Spatial Plan, Central Wales Spatial Plan strategy (see section 2.5.3 of this paper), emphasises the importance of "reinforcing the current mosaic and scale of towns, enhancing their attractiveness as places in which to live and work creatively". However, as identified in section 7.2.4, issues including the current volatile economic climate and the emergence of online shopping present significant challenges for the County's centres.

7.3.2 The Local Development Plan will therefore need to facilitate the resilience and renaissance of Powys' centres. In order to achieve this it will need to identify the network and hierarchy of centres, their roles and functions and set out a framework for the future (Planning Policy Wales - Edition 7, paragraph 10.2.1). As part of this, mechanisms that the Local Development Plan may use to facilitate the resilience and renaissance of Powys' centres include directing new town centre uses to existing centres, enabling a diversity of uses within the centres whilst maintaining a high proportion of retail uses on primary shopping streets and ensuring that new out of centre retail is limited to that which meets needs but does not undermine existing centres.

7.3.3 Mechanisms identified by the Powys Retail Study that should be considered for inclusion in the Local Development Plan to facilitate the resilience and renaissance of Powys' centres are summarised in section 4.6.2 of this paper and include:

- Town centres as the first choice for retail development with the existing stock of premises assisting in accommodating projected growth;
- The impact of all out-of-centre retail applications of 280 sq.m gross or more and applications within centres of 1,000 sq.m gross or more should be assessed in the County; and

- Proposals to amend the retail hierarchy, town centre boundaries and shopping frontages

7.4 *Rurality/Access to Services*

7.4.1 The One Powys Plan identifies that the inability to access a range of services considered necessary for day to day living is a key determinant of deprivation and has a significant impact on an individual's health and well-being and that, given the geography of the county, this issue is particularly acute in Powys (see section 4.2 of this paper). Local village shops, sub-post offices, petrol stations, pubs and farm shops all play an important role in this regard providing easy access to basic provisions (especially for those with limited mobility), whilst also supporting the vitality and viability of rural villages and providing an important focal point for rural village life.

7.4.2 The important economic and social role that local retail provision can play is recognised in Planning Policy Wales, whilst Technical Advice Note 6 (see section 2.14 of this paper) supports the provision of such local facilities, especially “where they would benefit rural residents distant from existing facilities” advising that Local Planning Authorities in their Development Plans should “adopt a positive approach to planning proposals designed to improve the viability, accessibility or community value of existing services and facilities, including village shops and post offices, rural petrol stations … and rural public houses”. It advises that Authorities should support the retention and expansion of such facilities and set out in the development plan the criteria to be applied when considering planning applications that will result in the loss of important village services.

7.4.3 Access to local rural retail provision may also be enhanced by LDP policies supporting:

- Farmers adding value to their products through methods such as direct sales including farmers markets, box schemes, farm shops and internet marketing (see section 2.17 of this paper on the Welsh Government’s rural affairs policy document “Farming, Food & Countryside”)
- The additional role that Farm Shops can play in meeting the essential needs of the community by providing a diversity of retail services (for example a sub post office) in areas where there are no other shops. However this issue is addressed by national policy (PPW, section 10.3.10) and therefore may not require specific policy in the LDP
- Initiatives such as “Pub is the Hub”, which was introduced by HRH The Prince of Wales to encourage local authorities, local communities, licensees, pub owners and breweries to work together to support, retain and locate services within rural pubs.

7.5 *E-Commerce*

7.5.1 The Welsh Government’s Vibrant and Viable Places document (see section 2.11 of this paper) identifies that the traditional high street is declining with changing shopping habits such as increasing online sales. It is therefore recognised that the significant growth in online shopping since the late 1990’s is diverting expenditure from existing shops within the County. The 2012 Retail Study for the County identifies the emergence of online shopping and its rapid growth since the late 1990's, however it also states that "there is still uncertainty about its longer-term prospects and the potential effects in the high street". The Addendum to the 2012 Study, published in 2015, has considered and updated this aspect of the Study and identifies continued rapid growth in new forms of retailing as an alternative to more traditional forms of shopping. However, it also identifies that if retailers operate on-line sales from their traditional retail premises then on-line sales may not always mean reductions in need for retail floor-space.

7.5.2 E-Commerce does provide benefits and opportunities to the consumer including competitive prices, easy product comparisons and providing services to those with poor shop accessibility (e.g. those in certain rural areas) that would otherwise lack such provision. It may also provide benefits and opportunities such as enabling County retailers access to other markets and employment opportunities in the County associated with the distribution of goods (including opportunities in specialist distribution warehouses or existing retail premises that expand to operate on-line sales).

7.5.3 Nonetheless, many of the benefits and opportunities offered by e-commerce to the retailers and consumers within Powys are only available to those that benefit from broadband internet access. Paradoxically it is those consumers that are least likely to benefit from appropriate broadband access (i.e. in the most rural areas of the County) who suffer from poor shop accessibility and therefore may benefit most from e-commerce.
In order that the benefits and opportunities afforded by e-commerce can be realised the Local Development Plan should support any initiatives aimed at improving the coverage of broadband within Powys

7.6 *Climate Change & Peak Oil*

7.6.1 Wales' climate is changing as a result of man's activities, and the rate of change is unprecedented. The weather patterns which Wales will experience as the 21st century progresses will impact upon the economy and the challenge is to adapt to these changes. In addition, in recent years there has been significant volatility in the cost of fossil fuels.
These issues are being acutely felt in Powys because, as detailed within the One Powys Plan (see section 4.2 of this paper) Powys has a sparsely populated upland landscape and poor connectivity with the cities of England and Wales and, as identified in the Wales Spatial Plan – Central Wales Area Strategy (section 4.1 of this paper) there is a high dependency on car and road based transport.

7.6.2 The emphasis placed upon tackling climate change coupled with volatile fuel prices has a number of potential impacts, including:
- Greater emphasis on the local provision of goods and services; and
- Changes in the way people access services

The LDP should therefore ensure that it is supportive of measures that seek to address the impacts of climate change and peak oil, such as the transition towns initiative (see section 5.2 of this paper) and the provision of transport facilities in retail centres to accommodate alternative means of transport other than the car (e.g. cycle routes / racks and recharge points for electrical vehicles).

7.7 *Key Economic Regeneration Initiatives in the County*

7.7.1 There are a number of key economic regeneration initiatives that have been undertaken or are taking place within the County with aims and objectives that relate to retailing and town centres.

7.7.2 Some initiatives seek improvements to our centres, such as the Town Centre Loans Fund (see section 2.11.7), the Ystradgynlais Town Centre Masterplan (see section 3.4.6) and the Severn Valley Strategic Regeneration Programme (see section 3.6). Such initiatives seek to achieve physical improvements to the built environment which may enhance the vitality and viability of town centres. In addition, Powys' Regeneration Strategy (see section 3.2.4) proposes that Whole Town Strategies are produced for each town in the County to facilitate their resilience and renaissance, whilst some communities may have or are planning their own plans and strategies (for example Welshpool Town Council's Town Plan and Llandrindod Wells' Economic Regeneration Plan). The Powys Local Growth Zones initiative also identifies a series of interventions aimed at enhancing the roles and viability of our town centres (see section 3.5 of this paper).
Other economic regeneration initiatives may help to improve the local provision of goods and services such as the Transition Towns Initiative, Cambrian Mountains Initiative (see section 3.6), Dyfi Biosphere (see section 3.7) and Rural Development Plan strategic projects.

7.7.3 It is essential therefore that the LDP is supportive of the work planned or undertaken under these regeneration initiatives and further that LDP policies and proposals do not undermine such work (for example, through inappropriate land allocations as detailed in section 7.2.4 above).

7.8 Key Issues for Inclusion in Deposit Plan

7.8.1 The above paragraphs identify a number of issues relating to retail and town centres that the Deposit Draft Local Development Plan must address.
In order to ensure that the Deposit Draft Plan is succinct, it is considered that the identified issues can be summarised in the following statements:

LDP Key Issue 4 -
Rising energy costs and peak oil are impacting on all economic sectors given the rural geography of the county. Adapting to these changes and the transition to a low carbon / green economy to ensure a more sustainable and resilient economy needs to be supported by the LDP.
Covers issues identified in section 7.6 of this paper (above).

LDP Key Issue 8 -

Activities and initiatives that support social and economic regeneration must be supported by the LDP.
Covers issues identified in sections 7.5, 7.6 & 7.7 of this paper (above).

LDP Key Issue 9 -
One of Powys' most prominent assets is the distinctive quality of its towns and villages. The economic climate and online shopping present significant challenges for the county's town centres and have led to vacancies in some towns. The LDP will need to support the resilience and renaissance of town centres, whilst at the same time facilitating sustainable rural retail provision and enabling the opportunities of e-commerce to be realised.
Covers issues identified in sections 7.1, 7.2, 7.3, 7.4 & 7.5 (above).

LDP Key Issue 33 -
The LDP will need to direct development to locations that are best served by existing and potential infrastructure and services and to ensure that the location of development is co-ordinated with the review of public service provision.
Covers issues identified in section 7.4 of this paper (above).

8.0 OBJECTIVES

8.1 The following objectives relating to this topic have been proposed for the LDP. They have been written to address the key issues identified in this topic paper and those identified in some of the other topic papers.

LDP Objective 1 – Meeting Future Needs
To meet the needs arising in Powys over the plan period up to 2026, to provide adequate, appropriately located land for:
i. 5,000 dwellings to meet all the housing needs of Powys' increasing and ageing population and its decreasing size of households, including open market and affordable housing, gypsy and traveller accommodation and other specialist housing needs.
ii. 49 hectares of employment and economic development uses.
iii. Retail, tourism, recreation, infrastructure, services and other needs.
(Addresses key issue 9)

LDP Objective 2 – Sustainable Settlements and Communities
To support sustainable development, access to services and the integration of land uses, by directing housing, employment and services development in accordance with a sustainable settlement hierarchy. Higher levels of development will be directed to Powys' towns and larger villages but where these are unable to sustain further growth due to capacity constraints, development will be accommodated in nearby towns or large villages.
(Addresses key issues 9 & 33)

LDP Objective 6 – Vibrant Economy
To support a diverse, robust and vibrant economy for Powys, including a strong rural economy, which is sustainable and responsive to change. To ensure towns and larger villages are the main focus for economic development and that town centres are vital, viable and attractive.
(Addresses key issues 4, 9 & 33)

LDP Objective 7 – Key Economic Sectors
To maintain and strengthen key economic sectors within Powys including manufacturing in the Severn Valley and Ystradgynlais, sustainable year-round tourism opportunities, agriculture and the rural economy.
(Addresses key issues 4, 8, 9 & 33)

LDP Objective 8 - Regeneration
To support the regeneration and renewal of Powys' built environment, its historic towns and employment premises and to support regeneration activities such as the Powys Local Growth Zone initiative.
(Addresses key issues 8, 9 & 33)

LDP Objective 16 – Community Well-being
To promote development that supports community wellbeing and cohesion, especially in communities suffering from multiple deprivation and social exclusion.
(Addresses key issues 8 & 9)

9.0 DEPOSIT DRAFT POLICIES

9.1 The Policies below have been included in the Deposit Draft Plan to support and achieve the objectives above. These policies cover numerous issues and objectives, not just those identified in this topic paper.
It should be noted that some of these policies have not been repeated in their entirety. Full policy text and supporting justification for the policies (based on the content of this and other topic papers) is contained within the Deposit Draft Plan.

Policy DM1 - Strategic Planning Matters
All proposals for development must not compromise, or unacceptably adversely affect, either on their own or in combination with existing or approved development, the following:
1. The integrity, role or objectives of a settlement as defined by the LDP's Sustainable Settlement Hierarchy or lead to unacceptable detrimental pressure on existing community facilities, public service provision or infrastructure.
6. An existing neighbourhood shop, village shop or service unless:
i. The premises have been for sale or vacant for a prolonged period and genuine attempts at marketing the existing use during that time have been unsuccessful.
ii. Other solutions to support the long-term economic viability of the business have been adequately explored.
(Objectives 2, 6, 8 & 16)

Integrity, role and objectives of a settlement and development of a site allocated by the LDP. Proposals for developments should be of a scale, use and design that complement the position of a settlement in the Sustainable Settlement Hierarchy. The cumulative impact of development should also be considered when assessing the impact of proposals, along with other existing development and unimplemented permissions still valid at the time of decision. Allocated sites will be protected for the purposes and uses for which they are allocated.

Protection of neighbourhood / village shops and services. Given their importance, the Council recognises the need to retain these shops and services. A flexible approach to the use of existing premises can help sustain much needed facilities and it may be appropriate for a local village pub to operate as a village shop or sub-post office. This may reduce the need for local people to travel long distances in search of essential services, and at the same time may provide additional revenue for the business. It may also be possible to secure the long-term viability of the business through community ownership. A prolonged period for marketing purposes is defined as at least 6 months.

Policy R1 – New Retail Development
The retail hierarchy of Powys is:

Area Retail Centres:	**Llandrindod Wells, Llanidloes, Machynlleth, Newtown and Welshpool**

District Retail Centres:	**Builth Wells, Knighton, Presteigne, Rhayader and Ystradgynlais**
Local Retail Centres:	**Llanfair Caereinion, Llanfyllin, Llanwrtyd Wells and Montgomery**

New retail developments should be of a scale and design appropriate to the settlement and in accordance with the settlement's role in the retail centre hierarchy.
Proposals that would undermine the retail hierarchy will not be permitted.
(Objectives 2, 6 & 8)

In accordance with national planning guidance this policy defines a retail centre hierarchy as a framework for determining future development proposals. This approach integrates land use planning so that, for instance, new retail development can be integrated with the provision of housing. In so doing this will reduce the need to travel, enhance existing centres and support the viability of existing retail providers.

As detailed within the Powys Retail Study the proposed Retail Hierarchy for Powys consists of 3 tiers of provision. The differences between these centres are determined by a number of factors, including:
• The number, type and range of shopping services provided by the centre;
• The character and attractiveness of the centre;
• The size of its catchment area; and
• Accessibility by means of different transport modes.

Area Retail Centres: The largest retail centres in the County are accessible to a wide range of transport modes and characterised by having a well-defined town centre, containing a wide range of retail outlets, financial and professional services, both nationally and locally owned. They serve not only their resident population, but also a wide catchment area due to the nature of retail facilities and services they offer. Settlements categorised as Area Retail Centres are therefore considered to be strategically important in terms of their retail and service provision and best suited to accommodate large new retail developments.

District Retail Centres: These towns provide significant retail facilities for their immediate hinterlands and for visitors to the area but do not perform the wider role of Area Retail Centres. They have a good range of shops and services and whilst capable of satisfactorily accommodating modest new retail developments, are less well suited to larger developments.

Local Retail Centres: These tend to be smaller towns or larger villages, with lesser catchment areas, generally characterised by either a very compact retail area or a dispersal of several shops. They offer a limited range of facilities and services, including banking and postal services, many of which are essential for day to day basic needs and for the successful operation of local businesses.

Policy R2 – Development within Town Centre Areas

Within settlement Town Centre Areas as defined on the Proposals / Inset Maps, development will be permitted provided it complies with the following criteria:

1. **It enhances the vitality and viability of the existing town centre and accords with Policy R1;**
2. **It does not propose a residential (C3) use on a ground floor in a Primary Frontage; and**
3. **It would not result in an unacceptable concentration of non A1 (shops) and A3 (food and drink) uses within a Primary Frontage or non A1, A2, (commercial) A3 and other appropriate town centre uses in a Secondary Frontage, unless:**
   i. **The shop has been vacant for a prolonged period and genuine attempts at marketing the existing use have been unsuccessful; or**
   ii. **The proposal is for a community use which is of wider public benefit and in need of a town centre location.**

(Objectives 1, 2, 6 & 8)

Within each of the Retail Centres a Town Centre Area has been identified. These areas are the most appropriate locations for town centre uses and the policy aims to ensure a concentration of diverse town centre uses in accessible areas, in order to sustain and enhance centres whilst reducing the need to travel.

Primary Shopping Frontages have been identified in Retail Centres where there is a concentration of primarily A1 shops along the most important shopping streets. The purpose of a Primary Frontage is to ensure that the retail units located in these key shopping streets are retained for A1 and A3 retail uses (shops, restaurants, cafes). Primary Frontages will ensure that non-retailing uses do not become concentrated to the extent that they detract from the appeal and convenience of existing centres for shoppers.

Secondary Shopping Frontages have also been identified in some settlements where there are frontages that make an important contribution to the vitality, viability and attractiveness of the centre but where a wider mix of uses may be considered appropriate.

As a guide, an unacceptable concentration of uses in Primary and Secondary Frontages is a concentration of more than three non-conforming uses in adjacent units or 33% of the frontage.

The policy will be monitored, and the Council accepts that local communities may also wish to review Primary and Secondary Frontages during the Plan period. Where this occurs, the Council should be involved within the process from the outset if it is to approve any revisions as Supplementary Planning Guidance.

Where no Primary or Secondary Shopping Frontages have been identified, it is envisaged that the desired mix of retail, commercial and service uses can be accommodated within the Town Centre Areas without any detriment to the shopping function.

Proposals within a Town Centre Area must demonstrate that they enhance the vitality and viability of the centre. Therefore, conversion to residential use on a ground floor in a centre will not be supported in a Primary Frontage and is unlikely to be supported elsewhere in centres.

The LPA will also require impact assessments in support of applications for large scale retail proposals. As a guide, large scale retail proposals within Town Centre Areas are anticipated to be of 1,000 sqm or more or 280sqm or more in Local Retail Centres although in some circumstances an impact assessment may be required for smaller proposals.

Policy R3 – Large Out-Of-Centre Retail Developments
Proposals for large scale retail developments will only be permitted outside of Town Centre Areas and within the development boundaries of an Area or District or Local Retail Centre and if they meet the following criteria:

1. **The developer shall demonstrate that there is a need for the development and that there are no alternative more appropriately located sites available; and**
2. **The proposal, individually or in combination with other permitted retail developments, shall not undermine the retail hierarchy or have an unacceptable adverse impact on the vitality and viability of the Retail Centre or other nearby centres and accords with Policy R1.**

(Objectives 1, 2, 6 & 8)

It is the Council's policy to locate future retail development within existing town centres wherever possible. Therefore, developers proposing new large scale out-of-centre developments will be expected to demonstrate that there is a need for the additional retail provision, that it can be satisfactorily located and that it will not have an unacceptable adverse impact on existing retail centres.

National Planning Policy establishes the approach to applying the needs and sequential tests for retail development. However, TAN4 defines edge-of-centre sites as a location normally not more than 200-300 metres from existing town centre shops. A 300 metre distance from the boundaries of the centres in Powys will cover a significant area. Therefore when applying a sequential test the definition of an edge-of-centre site in Powys is a site outside but adjoining a defined Town Centre Area and easily accessible by town centre shoppers.

National policy identifies that retail impact assessments should be submitted for applications of 2,500sqm gross floor space or more. However, in Powys smaller scale developments can have a significant impact on existing centres. Powys' Retail Study therefore identifies that the impact of all out-of-centre developments of 280sqm gross floor space or more should be assessed.

This Policy is therefore applicable to development that has a gross floor space of 280 sqm or more, or smaller scale proposals where it is considered that they may adversely impact on existing centres (e.g. where there may be a cumulative impact in combination with other developments or where the additional floor space would take an individual store above 280sqm).

Policy R4 – Neighbourhood and Village Shops and Services
The establishment of new neighbourhood and village shops or services will be approved where they:

1. **Are located within a Town, Large Village or Small Village; and**
2. **Serve the needs of the local area; and**
3. **Do not undermine the retail hierarchy or have an unacceptable adverse impact on the vitality and viability of the Retail Centre or other nearby centres and accord with Policy R1.**

(Objectives 1, 2, 6, 7, 8 & 16)

Individual shops provide an important function at the local neighbourhood level within towns, villages and the more isolated areas of Powys. This also includes pubs and filling stations, which can act as essential outlets for basic daily provisions and services. This policy supports such development with a gross floor space of less than 280sqm. Policy DM1 refers to proposals involving the loss of neighbourhood and village shops and services.

9.2 Within Planning Policy Wales, Edition 7 (July 2014) the following paragraphs contain statements of national development control policy which should not need to be repeated as local policy in LDPs:

Paragraph	*Policy Issue*
10.1.2	Locating retail and other services in existing centres
10.2.2	New regional shopping centres
10.2.4	Mixed use development
10.3.1, 10.3.16	Uses best located in centres - key factors
10.3.2	Uses best located in centres - needs
10.3.6	Major new retail proposals - incremental and cumulative effects
10.3.7	Retention of food shopping and essential services etc in centres
10.3.8	Out-of-centre food supermarkets
10.3.9	Change of use to/from local shops and village shops, and to/from public houses
10.3.10	Shops ancillary to other uses, e.g. farm shops
10.3.11	Change in nature of edge of centre and out-of-centre retail developments
10.3.12	Bulky goods
10.3.13	Factory outlets
10.3.14	Warehouse clubs
10.3.15	Amusement centres
10.3.16	Inappropriate retail allocations
10.3.17	Retention of allocated retail sites
10.3.18	Retail development on land designated for other uses

10.0 REVIEW OF UNITARY DEVELOPMENT PLAN POLICIES

UDP Policy	Comment	LDP Approach
UDP SP7 - RETAIL DEVELOPMENTS. LEISURE AND OTHER TOWN CENTRE USES	A strategic policy aimed at ensuring that new retail, leisure and other appropriate town centres uses are located in accordance with the Council's strategic settlement hierarchy, sustain & enhance existing provision and, where appropriate, sustain & enhance the vitality, viability and attractiveness of centres.	LDP Policies DM1 (criterion 1), R1, R2, R3 and R4 seek to support the provision of retail and town centre facilities appropriate in scale and nature to their location and, where appropriate, sustain & enhance the vitality, viability and attractiveness of centres.
POLICY RP1 - RETAIL CENTRE HIERARCHY	A policy that seeks to define a retail centre hierarchy as a framework for determining future development proposals.	LDP Policy R1 is a direct replacement for current UDP Policy RP1, with similar aims and objectives.
POLICY RP2 - ATTRACTIVE TOWN CENTRES	This policy encourages and supports a wide range of improvements to existing retail centres, which the Council will pursue over the plan period.	LDP Policy R2 ensures that the vitality and viability of centres is enhanced in development proposals for town centres. The attractiveness of centres will be addressed through the Plan's Development Management policies. .
POLICY RP3 - TOWN CENTRE RETAIL DEVELOPMENT	Supports appropriate uses in town centres, resisting uses that would detract from the vitality, viability and attractiveness of primary frontages or centres.	The aims and objectives of UDP Policy RP3 are adequately addressed by LDP Policies R1, R2 and the LDP's Development Management policies.
POLICY RP4 - OFFICE AND COMMERCIAL DEVELOPMENT	This policy identifies where office and commercial development will be supported.	The aims and objectives of UDP Policy RP4 are adequately addressed by LDP Policies E1, E2, E3, R2 and the LDP's Development Management policies.
POLICY RP5 - LIVING OVER THE	Identifies where proposals for residential	It is not considered necessary to prove a

SHOP	accommodation in centres will be supported.	direct replacement for UDP Policy RP5 as its aims and objectives can be addressed by LDP Policy R2 and relevant LDP housing policies.
POLICY RP6 - LARGE RETAIL DEVELOPMENTS	A policy that details the criteria that must be met for large retail development to be considered acceptable, including criteria relating to need, the sequential test and vitality, viability and attractiveness of centres.	LDP Policy R3 is a direct replacement for current UDP Policy RP6, with similar aims and objectives.
POLICY RP7 - BULKY (NON-FOOD) GOODS	This policy relates specifically to two retail allocations and identifies their acceptable uses.	UDP Policy RP7 is specific to two land allocations within the UDP that are not carried forward into the LDP. The Policy is therefore unnecessary.
POLICY RP8 - TOWN CENTRE REDEVELOPMENT OPPORTUNITIES	Identifies that redevelopment of sites within or adjacent town centres may need to comply with a development brief prepared for the site.	UDP Policy RP8 is considered superfluous and is therefore not carried forward into the LDP.
POLICY RP9 - RETAIL MARKETS	Ensures that proposals for retail markets do not adversely affect the vitality, viability and attractiveness of centres.	It is considered that the aims and objectives of UDP Policy RP9 are adequately addressed by the LDP's Retail and Development Management policies.
POLICY RP10 - NEIGHBOURHOOD AND VILLAGE SHOPS AND SERVICES	A policy that details the criteria that must be met for neighbourhood and villages shops to be considered acceptable and those that must be met when proposing the loss of such facilities.	The aims and objectives of UDP Policy RP10 are adequately addressed by LDP Policies DM1 (criterion 6) and R4.
POLICY RP11 - ANCILLARY RETAILING FROM NON-RETAILING SITES	This policy identifies when ancillary retailing from non-retailing sites will be considered acceptable.	It is considered that the aims and objectives of UDP Policy RP11 are adequately addressed by National Policy and the LDP's Retail and Development Management policies.

11.0 MONITORING

Below are the proposed annual monitoring indicators that relate to the topic of retail and town centres. These indicators are to be used to determine the performance of the LDP's retail and town centre policies and proposals.
The Welsh Government, in the Local Development Plan Manual, identifies a number of core output indicators that relate to this topic and are essential for assessing the implementation of national policy, including:

- Amount of development permitted on allocated sites in the development plan as a % of development plan allocations and as a % of total development permitted (ha and units)
- Amount of new development (ha) permitted on previously developed land (brownfield redevelopment and conversions) expressed as a percentage of all development permitted
- Amount of major retail, office and leisure development (sq m) permitted in town centres expressed as a percentage of all major development permitted (TAN4)

Topic & Reference	**Role & Function of Settlements – AMR 3**
LDP Objective	1 – Meeting future needs 2 – Sustainable settlements and communities
Target	Changes in the role and function of settlements in the sustainable settlement hierarchy throughout the lifetime of the LDP.
Policies	Chapter 3 & Appendices.
Local Indicator	Loss of services and facilities, de-population, demand for additional growth, major development impact. *To co-inside with full review of the plan.
Source	Community feedback, development management information.
Triggers and Actions	Any significant change to the role or function of a settlement and its subsequent consistency with the sustainable settlement hierarchy should be considered at the full plan review stage.

Topic & Reference	**Previously Developed Land – AMR 4**
LDP Objective	3 - Efficient Use of Land
Target	To achieve at least 40% of development on previously developed sites.
Policies	PPW
Core Indicator	Amount of new development (ha) permitted on previously developed land (brownfield redevelopment and conversions) expressed as a percentage of all development permitted.
Source	Northgate.
Triggers and Actions	Less than 40% of development to take place on previously developed land will trigger a review of the policy and, dependant upon the review, actions may include policy review and modification.

Topic & Reference	Retail Development – AMR 28
LDP Objective	6 – Vibrant Economy 8 - Regeneration
Target	That development is located in accordance with the LDP's Spatial Strategy & Retail Hierarchy, ensuring vital and viable town centres.
Policies	R1, R2, R3 & R4
Core Indicators	Amount of major retail, office and leisure development (sq.m.) permitted in town centres expressed as a percentage of all major development permitted per annum.
Source	Powys County Council planning consents and Retail Studies/Surveys.
Triggers and Actions	1 major retail, office or leisure development permitted outside of designated town centre boundaries contrary to LDP policies will trigger an investigation into the causes for its location. Resultant actions may include the reassessment of town centre policies and proposals. Where considered appropriate investigative work and subsequent action will be undertaken in collaboration with representatives from the Welsh Government, Commercial Agents and relevant private sector representative organisations.

Topic & Reference	Town Centres – AMR 29
LDP Objective	6 – Vibrant Economy 8 - Regeneration
Target	Town centre frontages that contribute to vital, viable and attractive town centres.
Policies	E2
Local Indicator	Unacceptable concentrations of non A1 and A3 uses within Primary Frontages. Unacceptable concentrations of non A1, A2 and A3 uses within Secondary Frontages. Increases in the number of vacant units in Primary and Secondary Frontages. Annual
Source	Powys County Council planning consents and Retail Studies/Surveys.
Triggers and Actions	Unacceptable concentrations of non-conforming uses or increases in vacancy rates in Primary or Secondary Frontages will trigger an investigation. Where considered appropriate investigative work and subsequent action will be undertaken in collaboration with representatives from the local Town Council, Property Owners, Developers and relevant private sector representative organisations.

Topic & Reference	Neighbourhood Retail – AMR 30
LDP Objective	6 – Vibrant Economy 9 – Infrastructure and Services 16 – Community Well-Being
Target	Retain and improve the provision of neighbourhood and village shops and services.
Policies	DM1(6) and R4
Local Indicator	Loss of a neighbourhood /village shop or service through change of use per annum
Source	Powys County Council planning consents.
Triggers and Actions	The loss of any neighbourhood/village shop or service contrary to LDP policies will be investigated to determine whether it has resulted in a net loss of shop or service provision to that neighbourhood or village. Subsequent action may occur if a net loss has been identified. Where considered appropriate investigative work and subsequent action will be undertaken in collaboration with representatives from the local Town or Community Council, Property Owners, Developers and relevant private sector representative organisations.

12.0 INVOLVEMENT

Information and comments from individuals and representatives of organisations with an interest in the economy of Powys have been sought throughout the preparation of this topic paper.

12.1 Involvement of Partner Groups / Organisations

Whilst the involvement of any individual or organisation in the preparation of this topic paper is welcomed, it is recognised that there are a number of specific groups / organisations that are essential to engage with in order to ensure the validity of the topic paper's content. These groups / organisations include:

Group / Organisation
Adjoining Local Authorities
Cambrian Mountains Initiative
CBI Wales
Chambers of Trade & Commerce
Country Land & Business Association
Dyfi Biosphere
Eco-Dyfi Valley Partnership
Farmers Union for Wales
Federation of Small Businesses
GLASU
Institute of Directors
Llani Limited
Powys County Council
Menter a Busnes
Mid Wales Manufacturing Group
National Farmers Union Cymru
PAVO
Welsh Assembly Government
Welshpool Projects

Many of these groups sit on the following representative organisations, whose participation in the preparation of this topic paper is also considered essential:

Powys Regeneration Partnership
The Powys Regeneration Partnership is the lead Partnership for the economic theme of the Powys Community Strategy and now has the central role in the management and delivery of elements of the Rural Development Plan in the County.
The Powys Regeneration Partnership is based on 18 full members, as follows:

Private Sector - Tourism Partnership Mid Wales / Mid Wales Tourism / Mid Wales Manufacturing Group / National Farmers Union Cymru / Farmers Union of Wales / Federation of Small Businesses
Public Sector - Powys Council / Brecon Beacons National Park Authority / Glasu / Coleg Powys / Powys Local Health Board / One Voice Wales
Voluntary Sector - Powys Association of Voluntary Organisations / Access to Service / Powys Third Sector Assembly
Community Sector - Powys Arts Forum / Village Halls / Credit Union

Powys Regeneration Programme Board
The purpose of the Powys Regeneration Programme Board is to ensure that the County Council adopts a corporate and inclusive approach to regeneration, to develop a regeneration strategy for Powys, and to develop suitable work programmes to instigate the strategy
Membership:
Powys County Council (Portfolio Holders for Regeneration & Development / Leisure & Recreation / Highways & Transport Policy / Housing, Public Protection & Community Safety / Corporate Governance & Corporate Property / Waste & Sustainability); and
Representatives from Mid Wales Housing Association, Brecon Beacons National Park, Robert Owen Community Banking Fund, Public Sector Partnerships - Princes Trust Cymru, Powys Association of Voluntary Organisations, Powys Regeneration Partnership, Hughes Architects, Abbey-Cwm-Hir Hall, Mid Wales Tourism Partnership, Mid Wales Manufacturing Group, Central Wales Economic Forum, Coleg Powys and Mid Wales Department of Enterprise and Transport

Central Wales Economic Forum
The Central Wales Economic Forum was set up in 2008 to forge a practical, working interface between the public and private sectors. It provides a platform for the business community to work collaboratively with public sector partners, and provides a forum for flexible discussion to inform and engage with the Welsh Assembly Government's Spatial Plan, and other elements of public sector strategic planning. The Forum works collaboratively with partners to promote the economic development and regeneration of the area.
Membership: Powys County Council, Gwynedd Council, Carmarthenshire County Council, Denbighshire County Council, Conwy County Borough Council, Mid Wales Manufacturing Group, Tattum & Guest, Towler Shaw Roberts, HSBC Banking, Rainbow Recruitment (UK) Ltd, Federation of Small Businesses, Powys Association of Voluntary Organisations, Wales Council for Voluntary Action, Ceredigion Associations of Voluntary Organisations, Mid Wales Tourism, Tourism Partnership Mid Wales, Agri Food Partnership, Farmers Union of Wales, Coleg Ceredigion, Coleg Sir Gar, Coleg Meirion-Dwyfor, Coleg Powys, University of Wales - Lampeter,
University of Wales Aberystwyth, Welsh Assembly Government (Spatial Plan Wales, DE&T, & DCELLS), Countryside Council for Wales, Snowdonia National Park, Mantell Gwynedd, Brecon Beacons National Park, Environment Agency Wales, Carmarthenshire Local Health Board, Job Centre Plus, Gwynedd Local Health Board and Ceredigion & Pembrokeshire Local health Boards

12.2 Involvement Undertaken To Date

Engagement / Involvement that has taken place to date as part of the preparation of this topic paper is detailed below.

In scoping and drafting this topic paper the involvement of a number of individuals and organisations was sought. Whilst much of this work took the form of informal discussions it also included the following more formal engagement exercises:

Organisation Contacted	*Method*	*Reason*	*Outcome*	*Date*
Powys County Council Economic Regeneration Manager ([redacted]) & Area Regeneration Manager - South ([redacted])	Meeting	To discuss the work of the Local Authority's Economic Regeneration Section	Identification of European, National, Regional and specifically the Local Policy Context	9/11/10
Powys County Council & Powys Regeneration Partnership (RDP Programme Officer - [redacted])	Meeting	To discuss the work of the Powys Regeneration Partnership (PRP) and work being undertaken under the Rural Development Plan for Powys.	Update on the role and work being undertaken by the PRP including work under the Rural Development Plan.	25/11/10
Welsh Government (Area Manager Wales Spatial Plan - [redacted])	Meeting	To discuss the Wales Spatial Plan	Update on national economic regen initiatives & work being undertaken under the Wales Spatial Plan.	3/12/10
Central Wales Economic Forum	Presentation to Meeting & Discussion	To inform Forum of work being undertaken in the preparation of the LDP.	Update on composition and work of the Forum.	10/12/10
Welshpool Projects	Presentation to Meeting & Discussion	To provide information on work being undertaken in the preparation of the LDP.	Gain information on the role of the group, its work and to gather further information on contacts	25/1/11
Welsh Government Regional Engagement Team	Meeting	To discuss the work of the Regional Engagement Team	General discussion and updating on studies, initiatives and projects	27/1/11
Powys Regeneration Partnership	Presentation to Meeting & Discussion	To provide information on work being undertaken in the preparation of the LDP.	Gain information on the role of the group, its work and to gather further information on	10/3/11

			contacts	
Federation of Small Businesses ([redacted])	Meeting	To discuss work of FSB & how best to engage with them.	Gain information on the role of the group, its work and to agree a consultation procedure.	16/3/11
Cambrian Mountains Initiative & Llani Ltd ([redacted])	Meeting	To discuss the Cambrian Mountains Initiative & Llani Ltd	Update on projects being undertaken and associated land use implications	8/4/11

The initial draft of this paper was presented to and considered by the Council's LDP Working Group on the 6th May 2011. The LDP Working Group comprises of 9 County Councillors who provide a broad political and geographical coverage.

The agendas, reports and minutes of past LDP Working Group meetings are available for viewing on the Council's website.

A draft of this topic paper was subsequently subject to a targeted consultation exercise from 26th April 2011 to the 10th June 2011 with the following stakeholder organisations:

Organisation Contacted	Representative (and LDP Representor Number)
Federation of Small Businesses	[redacted]
Mid Wales Manufacturing Group	[redacted]
Powys Regen Partnership	[redacted]
Powys Regen Prog Board	[redacted]
Central Wales Economic Forum	[redacted]
Menter a Busnes	[redacted]
Knighton Chamber of Trade	[redacted]
Builth Wells Chamber of Trade	[redacted]
Llanidloes Chamber of Trade	[redacted]
Newtown Chamber of Trade	[redacted]
Talgarth Chamber of Trade	[redacted]
Ystradgynlais Chamber of Trade	[redacted]
Llanfyllin & District Chamber of Trade	[redacted]
Powys and Mid Wales Chamber of Trade	[redacted]
Rhayader Chamber of Trade	[redacted]
CBI Wales	[redacted]
Institute of Directors	[redacted]
Welshpool Projects	[redacted]
British Retail Consortium	[redacted]
Rural Shop Alliance	[redacted]
Wales Tourism Alliance	[redacted]

Tourism Partnership Mid Wales (WG)		[redacted]
Visit Wales		[redacted]
Mid Wales Tourism (Private Enterprise)		[redacted]
Powys Association of Voluntary Organisations		[redacted]
NFU Cymru		[redacted]
FUW		[redacted]
Country Land & Business Association		[redacted]
WG – Regional Engagement Team		[redacted]
WG – Spatial Plans Team		[redacted]
GLASU		[redacted]
Powys County Council – Development Management		[redacted]
Powys County Council – Regen Managers		[redacted]
Llandod Spa Trust		[redacted]
Sleeping Giant Foundation		[redacted]
Cambrian Mountains Initiative		[redacted]
Rhayader 2000		[redacted]
Dyfi Biosphere		[redacted]
Eco-Dyfi Valley Partnership		[redacted]
Llani Limited		[redacted]
Offa's Dyke Country Partnership		[redacted]
Communities 1st Ystrad		[redacted]
Communities 1st Oldford		[redacted]
Communities 1st Bro Dyfi		[redacted]

Feedback from this consultation exercise has influenced the content of the paper and following the consultation exercise subsequent discussion with stakeholders has taken place on an individual basis to further inform and update the paper.

The February 2015 Deposit Version of this paper was considered by the Council's LDP Working Group on the 2nd March 2015 alongside the 2012 Retail Study and 2015 Addendum to the Retail Study. Following consideration by the working group this paper, the Retail Study and its addendum were made available to the Cabinet and Full Council during their consideration of the 2015 Deposit Draft Plan at their meetings on the 21st April 2015 and 23rd April 2015 respectively.

12.3 Involvement on the Powys Retail Study

In addition to the above, as detailed previously within this topic paper, to inform the preparation of the Local Development Plan a Retail Study has been produced for the Powys Local Planning Authority area (excluding the Brecon Beacons and Snowdonia National Parks).

The primary purpose of the study is to provide part of the evidence base and rationale for retail & town centres policies and proposals within the Local Development Plan. As such it provides information on issues such as retail trends, population and expenditure, retail needs and town centre designations.

During the preparation of the study a number of households and business occupiers were interviewed in October 2011 to gain information on the following:

- NEMS Market Research carried out telephone interviews with 1,000 households across Powys with the main aim being to establish patterns for main food & top-up grocery shopping and non-food shopping.
- An interview of 200 business occupiers sought views on issues including strengths & weaknesses of current centres, need for small business support/affordable shops, current & likely business performance and constraints affecting performance.