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Research Evaluation Consulting



Evaluation of Current Practice in Relation to Town Centre Regeneration

Report for:

Welsh Government

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in partnership with:

per Consulting
PLANNING ECONOMICS
REGENERATION



Contributing Authors:

Chris Jones

Chris Wade

Keith Thomas

Nick Miller

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Executive Summary

Introduction

This report examines the lessons learned from existing projects and programmes in the seven Regeneration Areas (and Newport Urban Regeneration Company) in relation to the Welsh Government's commitment to focus on town centre regeneration. This is achieved by addressing four study objectives.

1. Evaluating local impact and value for money¹;
2. Considering how a strategic, partnership approach adds value to town centre regeneration;
3. Making recommendations about the types of interventions which should be prioritised to optimise impact and value for money;
4. Comparing delivery against similar interventions across the UK and beyond.

Approach

The approach taken to the work comprised three main elements:

1. **Delivery and Impact: data gathering.** This element mainly comprised:
 - A desktop review of contextual policy, Regeneration Area documentation and qualitative data on key town centre indicators;
 - Qualitative interviews and workshops with Welsh Government and related agency staff, Regeneration Area delivery teams, town centre groups and beneficiary businesses;
 - Online, quantitative survey of Regeneration Area stakeholders.
2. **Data analysis of town centre performance.** This comprised:
 - Review and analysis of quantitative town centre data in the context of information gained above;
3. **Case study development**, for each of the seven Regeneration Areas (and Newport Urban Regeneration Company);
4. **Comparator research**, using case studies from elsewhere in the UK.
5. **Reporting:** Compilation of this overview report and associated technical appendices.

Impact and Value for Money

Evidence of Impact

The research illustrates that there is significant variation in both the focus of investment and the progress made to date across Regeneration Areas, reflecting factors such as their scope and the maturity of the partnerships. There is also considerable variation in the availability of standardised data to monitor basic vitality and viability indicators, such as footfall and vacancy rates and no common template in place to secure such information. However, national datasets can be combined with the data available from Regeneration Areas to provide some insights into relative performance in Regeneration Area town centres which demonstrates their role as key service centres as convenience and comparison retailing tends to be relatively under-represented.

¹ Note that there are individual, longer-term evaluations being undertaken of all major town centre schemes and this report does not intend in any way to second guess their outputs. Rather, it provides an overview of the approaches taken, and any early emerging impacts especially in relation to partnership and behaviour change.

Vacancy data from across all Regeneration Area town centres suggests that although larger centres such as Swansea and Newport have performed relatively poorly in relation to footfall and vacancy rates, the majority of (smaller) Regeneration Area towns have in general maintained or increased footfall over the period and have now converged with UK average vacancy rates. This seems to suggest that some small town centres have proved more resilient to the recession than their larger counterparts, although there are some significant challenges facing these smaller town centres in terms of out of town retail, perception issues and accessibility, amongst other factors.

The implications of this may be that for smaller towns to compete more effectively, they need to continue with local investment plans and enhance the quality of offer within the existing model, develop their local identity and key selling points.

There is also a need in future town centre monitoring to also recognise that in addition to collating retail datasets that a more enriched and holistic set of data needs to be captured in terms of community, cultural, enterprise and well-being type indicators which will help shape the future role of our town centres.

Online survey results show that town centres have been the main focus for around half of all Regeneration Areas, with main issues relating to external perceptions and the lack of an attractive offer to visitors, along with more familiar concerns about vacancy rates and, maintaining or developing the retail mix, which has been identified within the town centre data analysis. Regeneration Areas were seen as being successful in enabling the targeting of resources and in developing collaboration at a strategic level. Respondents were more sanguine, however, about their relationships with local communities and whilst physical activities such as public realm and building improvements were well rated, there was little recognition of the benefits of softer approaches, such as skills development or capacity building amongst the business community. This potentially reflects the focus by Welsh Government on capital funding with only limited revenue funding support made available by some Local Authorities.

Overall, however, there was strong agreement from practitioners that Regeneration Area town centres were more resilient than other towns and that investment through the Regeneration Area process had levered investment and improved these town centres.

As background to recommendations about future town centre interventions, the report defines the criteria for optimising local impact and value for money.

Optimising Impact

To be able to optimise the impact of town centre regeneration it is essential that there is clarity of vision and of the desired outcomes for individual towns, within the wider context of Regeneration Areas. This involves consideration and understanding of:

- an assessment of baseline indicators; the breadth of outcomes sought;
- targeted beneficiaries and the commercial and socio-economic context;
- an appreciation of the inter-relationship between a town and its neighbours;
- a realistic sense of the potential improvements and desired outcomes for the town - the so-called 'town trajectory'.

It is helpful to summarise the inter-relationship of these various criteria as a matrix to define desired outcomes and determine appropriate interventions and monitoring.

Achieving Value for Money

Value for money in this context is defined as achieving lasting impacts from funding and the influence achievable through working in collaboration. Factors that affect value for money achieved extend from routine housekeeping to establishing a lasting legacy from interventions and considerations and include:

- management and administrative overheads;
- preparation of realistic investment plans;
- effectiveness of leveraging-in additional funds;
- ability to generate a self-financing returns on investments and;
- the capacity to take a town's 'trajectory' beyond its 'tipping point' so that 'need' becomes 'opportunity'.

Such criteria for determining value for money in delivering holistic regeneration outcomes can be developed as a checklist to guide programme development, management and assess investment proposals.

Partnership Working and Added Value

The report considers criteria for determining the extent to which a strategic, partnership approach can be applied across geographical, organisational and sector boundaries and the following approaches are proposed:

- collaboration with key partners to prepare area-wide regeneration frameworks;
- working across other Government and local authority departments through 'town centre proofing' and 'bending expenditure';
- working as active partner members within individual towns and helping to provide specialist, national advice and share good practice between towns.

Recommendations for Future Interventions

Against this background of guidance on optimising impact, value and partnership working, the report makes recommendations about the types of interventions which should be prioritised by the Welsh Government to deliver town centre regeneration. In doing so, the recommendations are consistent with the changing focus of regeneration in Wales from physical enhancement towards more integrated approaches and offer an opportunity to advance Welsh Government policy and practice in relation to other departments and sectors; as well as the improvement of towns across Wales.

A list of recommended interventions is presented as a necessary sequence of activities to ensure optimum impact and value for money in delivering town centre regeneration:

Understanding Your Towns: Baseline data for monitoring & management

An essential prerequisite to undertaking regeneration in any town centre, should be to 'understand the place' by collecting key indicators that provide baseline data that can be monitored annually to track progress and influence decision-making. Importantly this information should be manageable to collect and be accessible and understandable to a range of stakeholders in a town and enable comparisons between towns. This understanding of place will involve:

- setting economic benchmarks;
- developing 'enriched' indicators;
- recognising different types of town and measuring and managing progress.

Integrated Regeneration and Investment Planning

Through its regeneration work, the Welsh Government is well-placed to coordinate town centre regeneration as a complex process dealing with interrelated issues that are driven by the wider economy and other social and environmental factors. From the review of existing SRA practice undertaken here and with reference to comparator studies, key factors to consider in this integrated planning are:

- agreeing a clear vision, strategy & action plan;
- looking beyond physical investment;
- understanding 'town trajectories';
- foreseeing a changing context.

Local Partnership Building and Organisational Development

An important part of meeting the Welsh Government's objective of optimising the impacts and value for money from town centre regeneration is to facilitate delivery through a holistic and collaborative approach. This requires coordination with partners and across sectors through engagement, empowerment and clarity of roles and responsibilities. The menu of approaches available to the Welsh Government to help embed such partnership building and local organisational development include:

- facilitating locally-led planning;
- developing cohesive partnerships;
- creating local delivery bodies with the right mix of skills.

Strategic Planning and Development Control

The spatial focus on town centres offered by Welsh Government involvement in the Regeneration Areas provides an opportunity to test and develop national policy and local practice in relation to strategic planning and development control:

- formalising strategic understanding;
- planning for 'town-centres-first' or for complementary and managed change.

Application of Regeneration skills

In tackling current issues and opportunities in town centres, there is a call from town centre regeneration delivery bodies and practitioners for a mix of technical, cross professional skills and softer skills that enable holistic town centre regeneration including:

- sharing expertise in physical regeneration;
- developing capacity for acquisition/land assembly;
- promoting and developing 'softer' skills;
- creating a property/land development advisory panel.

Creative retail growth & support

A creative approach is needed to find viable new and transitional uses for empty premises that should include:

- the flexible application of business rates;

- creating new and transitional uses for empty shops;
- forming a pan-Wales approach to enabling 'meanwhile' use.

Development and Inward Investment

Commercial retail investment is becoming increasingly polarised towards major and often sub-regional town centres, with the middle ground/traditional district centres potentially having an uncertain future. In devising future vision and strategy for town centres, partners must be realistic about the commercial development and investment and this could involve re-designing the focus of town centres and stimulating new local/independent businesses.

Managing Transition and Maintaining Momentum

It is important to recognise the current time as a period of transition for the Regeneration Areas and for the Welsh Government to take a leading role in ensuring that the momentum achieved is maintained. Without this there is a risk of instability and that some of the recent gains might be lost or set-back. It is recommended that the Welsh Government can assist with a smooth transition in the Regeneration Areas by:

- investing in need and effectiveness;
- supporting transition;
- maintaining 'special' status.

Comparator Evidence

The comparator studies from Yorkshire and Scotland capture learning points from programmes of a comparable scale and budget; whilst the Flintshire example demonstrates what can be achieved by a strategic approach to town centre regeneration in Wales outside of the Regeneration Areas.

Key lessons gleaned include: the importance of longer-term preparatory work in developing a shared town vision, strategy & action plan; the value of integrated delivery combining quick win projects, community capacity building and long-term investment planning; and the effectiveness of coordinating interventions between neighbouring towns in a way that recognises their distinctive roles. Civic leadership needs to nurture over a long period to be able to deliver agreed action plans and physical regeneration should be matched by other types of intervention and skills including enterprise support, marketing and events promotion.

1. Introduction to the Report

Miller Research, in association with Action for Market Towns and PER Consulting, has been commissioned by Welsh Government to undertake a review of current practice in town centre regeneration in Wales. This report has been prepared to help contribute to the evidence base for the ongoing town centre regeneration policy development within the Welsh Government.

The purpose of the full study is to examine the lessons learned from existing projects and programmes in the seven Regeneration Areas and Newport Urban Regeneration Centre (URC), in relation to the Welsh Government's commitment to focus on town centre regeneration. This is achieved by addressing the four study objectives:

1. Evaluate the local impact, and value for money, of town centre projects and programmes within the seven Regeneration Areas and Newport URC.
2. Consider the extent to which the strategic, partnership approach employed in the Regeneration Areas adds value to town centre regeneration.
3. Make recommendations about the types of interventions which should be prioritised by the Welsh Government to deliver the optimum impact and value for money in terms of town centre regeneration, based on the experience of delivery in the Regeneration Areas.
4. Compare, as far as possible in the time available, delivery in Regeneration Areas against similar interventions across the UK and beyond.

The first three of these objectives are addressed in this report with reference made to comparable interventions across the UK and beyond as appropriate. Further case study evidence is presented in the accompanying technical appendices.



PART ONE: BACKGROUND

2. Background

In February 2012 the Minister for Housing, Regeneration and Heritage, Huw Lewis announced a review of regeneration policy in the country, which would form the basis of future regeneration priorities to be outlined in early 2013. In calling for the review he said, "Reviewing where we are and what we do is essential to getting the right results going forward." He continued by stating: "As budgets become more constrained, we need to be even more imaginative and focused about how we invest. The importance of regeneration in these challenging economic times cannot be underestimated."

Importantly the Minister for Housing, Regeneration and Heritage also recognised that achieving sustainable economic growth in town centres through successful policy delivery depends on "continued good coordination between different departments, local authorities and the third sector, while European funding would be an important source of future finance".

The overarching aim of this report is, therefore, to contribute to the evidence base for the policy review currently underway. In particular, this study will examine the lessons learned from existing projects and programmes in the seven Regeneration Areas (and Newport URC). In relation to the Welsh Government's commitment to address town centre regeneration, the Labour Manifesto states;

Continue our efforts to regenerate our town centres through planning policies breathing new life into towns by safer and better quality design, developing family friendly environments and mixed use developments.

This report comes at a key moment for town centres in the United Kingdom with Welsh Government wishing to understand the local impact, and value for money of town centre projects and programmes within the Regeneration Areas. It considers the extent to which the strategic, partnership approach employed in the Regeneration Areas adds value to town centre regeneration and makes recommendations about the types of intervention which should be prioritised.

The Welsh Government has recognised the complex challenge of delivering regeneration in the current climate and has created a ministerial post covering Housing, Regeneration and Heritage that integrates previously disparate functions affecting local regeneration outcomes. The strategy for regeneration has also encouraged improved cross-departmental working, seeking to direct mainstream service funding to support wider regeneration and sustainability objectives and helping to improve the prospects for local communities.

The policy approach which led to the formation of the Regeneration Areas has been driven by the need to prioritise areas for intervention and now there is an even greater need to prioritise and focus attention on activities which have the greatest potential to generate impact and local benefit. There is also a need to switch from a "grants" culture to an "investment" culture and to build capacity in communities for more "self-help" and "responsiveness" to change.

This opportunity for change was recognised by the Minister for Housing, Regeneration and Heritage at the launch of the CREW Small Towns Network stating "Town and city centres are the heartbeat of our communities; they play a vital role in Welsh community life, and they are continuously evolving. However, only the most adaptable, innovative, creative, high

streets, where the needs of customers are understood, will survive and thrive in this global, vibrant marketplace.”

The need to adapt existing ways of working to respond to current challenges was strongly reflected in the National Assembly for Wales' report on the regeneration of town centres and in the Welsh Government's response to it. The Assembly's report contained a broad sweep of recommendations that build on existing practice and present a holistic approach that includes community engagement and leadership, new financial mechanisms, planning safeguards, transport and recognition of the need to enhance local character.

Two additional regeneration policy issues emerging from the National Assembly's report relate to the scope to understand, and account for, the inter-relationships between towns; firstly in terms of the respective roles and function of neighbouring towns relative to each other (an acute issue in the South Wales Valleys) and secondly, in relation to the importance of applying town centre regeneration policy throughout Wales, understanding the impacts both within the Regeneration Areas and across the wider national economy.

In compiling this report, the focus has been placed on evaluating the effectiveness and efficiency of delivering town centre projects within respective regeneration areas. This includes reviewing and distilling lessons learned from the variety of approaches adopted, reviewing comparator programmes elsewhere in the UK and subsequently bringing together key findings that take thinking and practice forward in terms of both policy development and ways of working across sectors and communities.

Welsh Government is also currently developing bold and innovative approaches in other policy areas, such as the Sustainable Development Scheme and in planning reforms, which could contribute to more resilient and vibrant town centres. European funding priorities are also being shaped for post 2013, and this implies a need to understand which interventions are working in terms of infrastructure and also how other programmes should be aligned in terms of targeting resources.

This evaluation, then, needs to review current activity in town centres but also look at future proofing to ensure interventions that are enterprising, innovative and sustainable.

3. Policy Context

3.1. Policy Setting

The following summary sets out a number of key and current policy instruments that set the tone for town centre regeneration and potential shape of future policy and delivery.

Programme for Government

In September 2011, Welsh Government published its Programme for Government which places an emphasis on how government can impact on people's lives by having a more outcomes based approach. These outcomes are: healthy people living productive lives in a more prosperous and innovative economy; safe and more cohesive communities, with lower levels of poverty and greater equality; a resilient environment with more sustainable use of our natural resources and a society with a vital sense of its own culture and heritage.

The document sets out to gauge its progress through a series of indicators that are based on socio-economic activity as well as people's well-being. The First Minister for Wales sets out within the document that "at the heart of this is a focus on people and our commitment to support the development of a fairer society in which every person is able to make the most of their abilities and contribute to the community in which they live. This is our Welsh account of sustainable development: an emphasis on social, economic and environmental well-being for people and communities, embodying our values of fairness and social justice."

The Programme for Government is not specific about town centre regeneration but does identify them as places that can deliver growth and sustainable jobs through entrepreneurship, enterprise zone support, and tourism and destination development. In relation to physical regeneration the Programme identifies capital investment in transport through "sustainable travel centres", next generation broadband and improved accessibility for all. As places to live, Welsh Government identifies the need to continue the implementation of the Welsh Housing Quality Standard and housing-led regeneration through its Renewal Areas.

In tackling poverty it sees the role of Regeneration Areas in delivering focussed and co-ordinated regeneration programmes that address local needs and opportunities with programmes such as Communities First addressing economic, skills, education and health outcomes. The culture and heritage of Wales is also recognised as being important with town centres playing a role in terms of interpretation, heritage based tourism and Cadw's wider conservation programme. Finally, environment and sustainability is a key cross cutting theme in terms of how we manage our environment to meet society's needs, specifically on the use of renewable energy within town centres, adoption of local development plans, provision of cycle routes and energy efficiency schemes for town centre businesses.

Regeneration Framework

In October 2010, Welsh Government produced a framework document² that set out its approach to regeneration. The basis for the Regeneration Area model is the belief that "co-ordinated effort and investment in the regeneration of an area can improve the prosperity of that area as well as the quality of life of the people living and working there".

² Framework for Regeneration Areas, Welsh Government, October 2010

The Regeneration Area approach aims to be inclusive and in each area, a Regeneration Area Board has been established to guide activity. The Boards are made up of local authorities, who are fundamental partners, as well as other representatives from the public, private and third sectors. The Boards are chaired by the Welsh Government and Regeneration Area teams have been allocated to support activity in each area. Regeneration Area Boards are charged with developing a Strategic Plan and Annual Investment Plan and identifying how to deliver against these. Ministerial approval is required for these Plans and delivery projects, including the overall allocation of funding for each area. At a strategic level, the Ambition Statement on Regeneration sets out very broad outcome targets for each Regeneration Area:

- Increasing prosperity and wellbeing for the whole community;
- Moving towards low carbon communities;
- Improving life chances for children and young people.

The document identifies the need to review delivery – including appraisal and monitoring – in current Regeneration Areas and to identify and implement best practice consistently across Wales, which is the subject of this specific review.

Sustainable Development Scheme

The approach to sustainable development in Wales is set out in Welsh Government's Sustainable Development Scheme³. The main aim of the scheme is "improving the economic, social and environmental wellbeing of people and communities in Wales over the long term."

Whilst there is no specific town centre theme within the scheme there is an acknowledgment that economic regeneration should be undertaken with sustainable development at its core, promoting low carbon, and low waste ways of working. In terms of new development within town centres, construction should be to the highest standards of energy and water efficiency, and be carbon neutral. New development and infrastructure should also be located, designed and constructed for the climate it will experience over its design life, and should minimise travel needs.

Provision for cyclists and pedestrians within towns and cities is promoted through a requirement for Travel Plans to be part of all new developments; implying improved walking and cycling networks along with better street design and traffic management measures.

Better Lives & Communities

This White Paper sets out proposals for new legislation and other, non-legislative, action across the current term of Government. These include:

- Increase the supply of new homes by building 7,500 new affordable homes, of which 500 will be co-operative homes and 500 will be built on surplus public sector sites, and by bringing 5,000 empty properties back into use;
- Improve the quality of existing homes, including their energy efficiency, through the Welsh Housing Quality Standard and other mechanisms;

³ One Wales: One Planet, a new Sustainable Development Scheme for Wales, Welsh Government May 2008

- Do more to prevent homelessness, and improve housing services to help people, particularly those who are vulnerable, to lead healthy, independent, lives;
- Make a significant contribution towards our long-term vision by ending family homelessness by 2019.

Specific proposals in relation to town centres include using empty shops and commercial properties to provide more homes and the use of housing-led regeneration such as the £10 million clearance and redevelopment of poor housing in West Rhyl and the £25 million Urban Village project in Swansea, which is providing a creative industries hub and 76 flats.

Improving the Planning System

In October 2011, the Minister for Environment and Sustainable Development established an Independent Advisory Group (IAG) to review the delivery of the planning system in Wales as part of the evidence base for a White Paper, leading ultimately to a Welsh Planning Bill. In response to the Call for Evidence respondents felt that a revised Wales Spatial Plan or a new national spatial planning framework was needed to set the strategic context for development planning at the regional and local level. This will have consequences on the role and function of town centres and their co-relationship with other centres.

Active Travel Bill

The White Paper⁴ sets out proposals to require Local Authorities in Wales to identify and map the network of routes within their areas that are safe and appropriate for walking and cycling. This includes identifying and mapping the enhancements that would be required to create a fully integrated network for walking and cycling and developing a prioritised list of schemes to deliver it, subject to budget availability and following due process. The Paper also requires consideration of the potential for enhancing walking and cycling provision in the development of new road schemes.

Economic Development

City Region

In autumn 2011, the Minister for Business, Enterprise, Technology and Science asked a Task and Finish Group to consider the evidence for city regions as economic drivers, and to identify potential city regions in Wales. The main objective of the review was to determine whether a city region approach appeared likely to deliver more jobs and greater prosperity in and for Wales than current approaches to economic development. The group recommended that a city region be recognised in South East Wales on the basis of existing patterns of movement and the potential for increased interconnectivity, together with the tradition of both social and economic interdependence. It also recommended that the Swansea Bay area be recognised as a city region, on the basis of the evidence of existing traffic flows, the potential for increased connectivity and the tradition of social and economic interdependence. This has opportunities in terms of focus and developing an integrated approach to the role of town centre, specifically their role and function.

⁴ Active Travel (Wales) Bill Consultation, May 2012

Infrastructure Investment Plan

The main aim of this Plan is to identify and prioritise nationally significant infrastructure investment across the Welsh public sector. This includes social as well as economic infrastructure and focusing resources on the highest priority schemes which will deliver the most benefit, which could include town centre based interventions. The plan provides a 10 year indication of the Welsh Government's 'direction of travel' and a rolling pipeline of approved investments, with the aim of providing greater clarity and certainty to delivery partners, especially those in the private sector, over medium and longer-term priorities. The pipeline will focus on Ministerial approved projects and programmes with a total project value greater than £15m.

3.2. Conclusions

Town centres are seen as key economic drivers for Wales, with an understanding that they have a relationship to their communities and that they can unlock social well-being as well as being places of employment. There is a sense that Welsh Government policy is guiding town centres to be places that are generators of employment and places to live and belong to.

Sustainable development is seen as a key theme in terms of how we develop, manage and promote town centres in terms of accessibility for all, provision of local services and ensuring town centres are places to live, as well as shop and visit. The role of Welsh heritage and culture and projecting town centre as places that have a wider visitor offer which can act as a place for exploring from as well as attractions in their own right. Finally, there is a recognition that some significant structural and poverty related issues still exist in our town centres due to their changing role and competition from faster growing centres. Welsh Government policy and programmes identify the continued need to tackle these issues in terms of ensuring prosperous communities with town centres that provide employment, health and basic services for day to day life.

4. Review Methodology

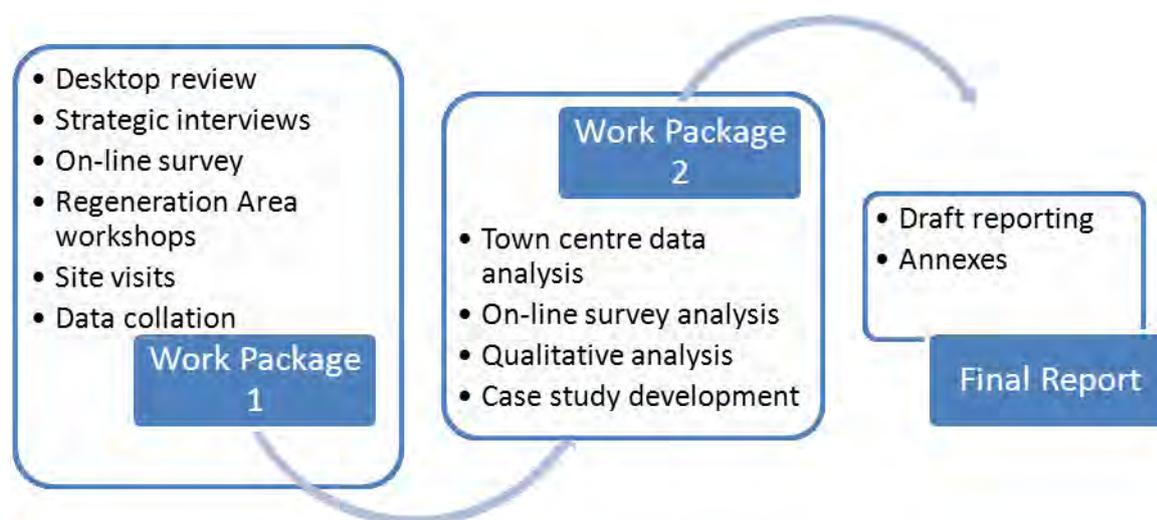
4.1. Approach

Our approach is based on a mixture of formative and summative evaluation techniques that use both quantitative and qualitative research founded in a comprehensive knowledge of how town centres work.

4.2. Process

The review process has been centred around two work packages.

Figure 1 - Review Methodology



Source: Miller Research (UK) Ltd

Work Package 1

This was initiated with a **desktop review** which reviewed Regeneration Area strategic documents relating to town centre activities and assess how other Welsh Government strategies complement Regeneration Area activity. Key documents included:

- Regeneration Area strategy documents
- Business case or rationale documents for town centre regeneration
- Partnership documents – terms of reference, memoranda of understanding, etc
- Local consultation documents
- Town centre related baseline documents:
 - Masterplans
 - Retail studies
 - Design studies
- Monitoring data
- Financial information
- Marketing and promotion material

The review team engaged with respective programme managers in terms of local documentation, partnership set up arrangements and a general understanding of operational

management. The desktop review and the initial discussions with delivery teams with the respective Regeneration Areas helped us to understand how far the individual Regeneration Areas have travelled, what has actually been achieved, what remains to be delivered and the implications for continuing support.

In **evaluating impacts** we have collated data from respective Regeneration Area programme managers and local authority regeneration teams in terms of the following indicators - vacancy rates and pedestrian footfall counts; which are typically the consequence of “attractiveness”. We have also worked towards collecting data on the general retail mix of the respective town centres. Where data has been made available we have analysed this and this is presented in Chapter 6 of this report.

The review has also sought to **evaluate delivery** within the respective Regeneration Areas in terms of effectiveness and efficiency of delivery models used within Regeneration Areas. This element of the review has been undertaken through a mixture of face to face and on-line surveys. This has specifically involved:

- A strategic workshop with Welsh Government staff across regeneration and other departments such as Cadw, Communities First, etc.;
- Interviews with respective delivery teams across the individual seven Regeneration Areas and Newport Urban Regeneration Company;
- Focus group sessions with individual Regeneration Area s partnerships (board and/or steering groups);
- Meetings with associated town centre groups that have a relationship within the Regeneration Area e.g. Valleys Renaissance Group;
- Site visits to a sample of town centres that cover a hierarchy of town centres. These have informed our case study development;
- Sample of face to face interviews with beneficiaries within local businesses and other services as part of the site visits where available;
- Provision of an on-line survey that was issued to Regeneration Area partnership members, operational staff, key stakeholder organisations and local town centre networks. This has resulted in us attaining 72 responses.

Work Package 2

On completion of work package 1 a review of quantitative data from town centres was undertaken, contextualised by local intelligence gained from respective Regeneration Areas and the online survey responses. Seven **case studies** have also been developed from visiting the Regeneration Areas⁵. These cover topics such as public realm improvements, reconfiguration of urban spaces and buildings, etc.

We have also undertaken some comparator research where we have drawn on the practice and policy experience across Wales, Scotland and England to produce a framework of good practice.

⁵ These case studies are set out in annex 2 of this report.



PART TWO: ANALYSIS

5. Town Centre Regeneration within Regeneration Areas

5.1. Context

Regeneration Areas aim to address inequalities experienced across geographical areas in Wales by investing in places that are currently under-performing, both economically and in terms of wellbeing, in order to raise their performance. The seven Regeneration Areas and Newport URC are each at a different stage of development and each with unique social, economic and environmental characteristics.

Table 1 - Town Centres within Regeneration Areas

Regeneration Area/URC		
Single city/town centre	Aberystwyth Barry Newport Swansea	
Multi town centre area	<i>Heads of the Valleys</i>	Aberdare, Abertillery, Bargoed, Ebbw Vale, Ferndale, Merthyr Tydfil, Pontypool, Taff Bargoed
	<i>Mon a Menai</i>	Bangor, Caernarfon, Holyhead
	<i>North Wales Coast</i>	Colwyn Bay, Prestatyn, Rhyl
	<i>Western Valleys</i>	Ammanford, Cross Hands, Glynneath, Maesteg, Neath, Pontardawe, Pontarddulais, Ystradgynlais.

Source: Welsh Government

As part of this review, an assessment of the local impact and value for money, of town centre projects and programmes has been undertaken within the seven Regeneration Areas and Newport Urban Regeneration Company, through a number of tasks and activities:

1. Desktop review, workshops and interviews within the respective Regeneration Area programme areas;
2. Analysis of town centre data provided by Regeneration Area programme areas and respective local authorities;
3. Provision of an on-line survey for Regeneration Area partnership/steering group/delivery team members and local stakeholders;

5.2. Overview of Regeneration Area Town Centre Activity

There is a wide variety of approaches to delivering town centre regeneration across the Regeneration Area partnerships. This reflects a number of factors such as:

Scope; Some Regeneration Areas, such as Aberystwyth, have a single settlement focus, whilst others, such as Heads of the Valleys, have cross authority coverage and are targeting eight town centres of various sizes and needs;

Maturity: Most of the partnerships, with the exception of the Heads of the Valleys, have also only been in existence for a relatively short time in terms of set up, project development and undertaking implementation.

6. Analysis of Town Centre Data

6.1. Availability of Data

From the outset of the study we sought to identify and capture the hard baseline evidence and trend data on town centre performance from the Regeneration Area Partnerships. Whilst recognising the Regeneration Areas have a broader remit than just town centres, there is a mixed picture in terms of the ready availability of consistent data to inform both current conditions and the emerging impact of regeneration activity. Even where monitoring data exists, this is often prepared for “planning” purposes and there is only a loose association or understanding of the evidence from within regeneration teams.

The availability of evidence from each of the Regeneration Areas is summarised below:

- **Heads of the Valleys** – generally good coverage although mostly captured for “planning” purposes.
 - *Most local authorities undertake annual town centre surveys compiling data on mix/uses and vacant floorspace. Good coverage of footfall counts maintained.*
 - *Good Practice experience includes triennial shopper surveys completed by Caerphilly County Borough Council.*
 - *ERDF evaluation studies currently underway for RCT, Caerphilly County Borough Council, Merthyr Tydfil, and Blaenau Gwent.*
- **Newport** – has monitored town centre vacancy rates since 2003 and maintains footfall count data but little analysis in terms of “health-checks” or retail mix.
- **Barry** – the Vale of Glamorgan planning division monitors all town centres with annual surveys dating back to 2003.
- **Swansea** – the City Council published annual “healthchecks” to 2007 but continues to monitor city centre uses, vacancy rates and footfall counts.
- **Aberystwyth** – has information on town centre vacancy rates and footfall counts but only up to 2005.
- **Western Valleys** – has only sporadic information from past retail studies.
 - *Bridgend County Borough undertakes annual health checks of all town centres, including Maesteg and is also in the process of undertaking an ERDF evaluation study for Maesteg and Bridgend.*
 - *Carmarthenshire Council is currently commissioning an ERDF evaluation study to provide baseline data and impact analysis for Ammanford, Llanelli and Carmarthen town centres.*
- **Mon a Menai** – has only recently started to prepare Baseline Monitoring data for 2012, working with Action for Market Towns.
- **North Wales** – no town centre data available.

6.2. Reviewing Performance & Trends

In taking a current snap-shot of town centre performance using the data available we have focused attention on the following elements:

- **Retail Ranking** – relative position in the UK and Wales hierarchy, where available.
- **Retail Mix** – as an indicator of the changing role and function of town centres.
- **Town Centre Vacancy Rates** – as a strong visual indicator of the strength of a town centre and commercial interest.
- **Footfall Counts** – as both an indicator of consumer commitment and confidence in a town centre.

6.3. Retail Ranking

National retail rankings are prepared annually by Javelin Venuescore and others based on the total centre floorspace and character/quality assessments of, mainly, national retail operators. Whilst the retail rankings can provide a useful litmus test of the relative retail offer of different centres, they tend to be rather less relevant to smaller (lower-order) centres given the emphasis on larger operations and floorspace.

Using the latest available UK ranking for 2011, we have calibrated the effective ranking of town centres in Wales based on their UK position. The table below identifies the ranking for town centres of interest in the Regeneration Areas where they are identified in the national retail ranking of over 2,000 centres by Javelin Venuescore.

Table 2 - Regeneration Area Town Centres Retail Ranking

Town	UK Rank 2011	Wales Rank
Swansea	75	2
Newport	165	4
Rhyl	231	9
Bangor	282	10
Merthyr Tydfil	288	11
Neath	317	13
Barry	396	18
Aberystwyth	442	19
Colwyn Bay	583	27
Ebbw Vale	583	27
Caernarfon	649	34
Aberdare	681	36
Ammanford	760	38
Maesteg	944	47
Pontypool	984	48
Tredegar	1,373	74
Abertillery	1,576	88
Holyhead	1,915	108

Source: PER Consulting based on Javelin Venuescore UK Retail Rankings 2011

Cardiff is the top ranked centre in Wales and was ranked 10th in the UK in 2011. The relative UK performance of other towns and cities in Wales drops rapidly, with Swansea (2nd in Wales) ranked only 75th in the UK and Newport (4th in Wales) 165th in the UK retail ranking tables. This reflects the considerable difference between towns in Wales in terms of their relative size and retail performance/offer.

Prior to the recession, there was a lot of jostling for position among the top 50-100 national retail centres, as big town and city centre retail expansion schemes came through to completion. These will tend to push the lower order centres down the national rankings, even if their local performance and attractiveness has been unaffected in their local markets.

The national retail market has changed dramatically since the onset of recession, with both the number of national operators shrinking and those who remain being far more sensitive about the scale and scope of outlets and town centre locations. Wales will, therefore, become increasingly unattractive to large scale development interventions, such as in Carmarthen before the recession. Indeed, given that the gap in UK retail rankings widens outside the top 5 centres in Wales, a pure retail-based regeneration response may prove increasingly unlikely to achieve in the future. Newport and Swansea are both close to realising their major development projects and should be able to influence their ranking and

retail performance as a result. Beyond these centres, however, regeneration ambitions with an emphasis on national retail rankings alone are likely to be far less achievable whilst the market remains sensitive to financial constraints. A much broader response to town centre activity will be required in future which fits the role and remit of town centres more effectively, including the local community and immediate catchment.

6.4. Town Centre Mix of Uses

Town centres across the Regeneration Areas in Wales are under-represented in both convenience and especially comparison retail compared to the UK average. Over 40% of UK towns centre units are occupied by “Comparison” retailers which is in sharp contrast to just 28% on average for the sample of Regeneration Area towns in the table. This shows retail does not dominate the role and function of the smaller Welsh towns. Similarly, Convenience retail units are also under-represented in the majority of Regeneration Area towns. Only Tredegar, Pontardawe, Clydach and Ystradgynlais have a higher than national average proportion of “Convenience” retail units in their town centres. This is not to say that local communities are necessarily under-served in terms of access to food stores, but is more likely to be a function of the town centre boundaries and typical presence of large food retailers on the edge or out of town centres. The most recent available data for towns has been assembled in the table below. Data for Barry, Swansea and the North Wales towns has been collated in a different format grouping all services together and these are shown separately.

Table 3 - Town Centre Mix of Uses

Town/ Location		Convenience	Comparison	Retail Serv	Leis Serv	Bus Serv	Vacant
		Shop Units %					
UK	Average	8.5%	41.4%	10.9%	15.9%	9.6%	13.7%
2011							
Regeneration Area	Average	7.5%	28.2%	16.2%	19.6%	15.8%	12.7%
Newport (2012)		5.4%	28.1%	9.1%	17.0%	17.5%	22.8%
Aberystwyth (2011)		7.2%	28.2%	12.5%	23.1%	19.9%	9.1%
Merthyr Tydfil (2011)		7.2%	33.6%	13.4%	18.5%	19.5%	7.9%
Tredegar (2011)		9.5%	26.6%	17.1%	17.1%	12.7%	17.1%
Aberdare (2012)		5.2%	34.9%	19.7%	17.4%	9.9%	12.8%
Abertillery (2011)		5.1%	21.7%	13.8%	22.5%	12.3%	24.6%
Ammanford (2012)		8.4%	35.1%	13.6%	19.5%	16.9%	6.5%
Brynmawr (2011)		5.8%	25.8%	17.5%	20.8%	10.0%	20.0%
Bargoed (2012)		6.9%	28.3%	20.7%	17.9%	15.2%	11.0%
Ebbw Vale (2011)		4.7%	34.1%	14.7%	19.4%	15.5%	11.6%
Pontardawe (2012)		9.9%	16.5%	18.7%	22.0%	26.4%	6.3%
Clydach (2012)		9.0%	19.4%	28.4%	25.4%	11.9%	6.0%
Ystradgynlais (2008)		13.7%	33.8%	11.8%	13.8%	17.6%	9.8%

Source: PER Consulting 2012

In contrast (and possibly as a consequence), in the Regeneration Area towns analysed above, “Service” provision plays a much stronger role, occupying more than 50% of town centre units on average. All town centres in the table above, apart from Newport, have a higher than national average presence of “Retail Services” (typically hairdressers, opticians etc.).

“Leisure Services” (Cafes, Bars, Clubs etc.) are also strongly represented in the sample of Regeneration Area town centres and not just the typical tourist centres such as Aberystwyth.

“Business Services” (Banks, Building Societies, Estate Agents and professional offices etc.) maintain a very strong presence across all the sampled town centres from the Regeneration Areas in the table above; with Pontardawe, Aberystwyth and Merthyr Tydfil more than double the national average presence.

Data for Barry Town Centre is available on a floorspace basis only, as shown in the table below. The proportion of convenience retail floorspace in town centres inevitably increases relative to the distribution of shop units in the earlier table due to the larger floorplates occupied by food retailers. Otherwise the pattern of floorspace use in Barry is broadly similar to that described above with a much higher presence of service uses, nearly 50% compared with just 23% of floorspace nationally; and a much lower presence of comparison retail floorspace in the town centre.

Table 4 - Barry Town Centre Mix by Floorspace

Floorspace % m ²	Convenience	Comparison	All Services	Vacant
UK Average 2010	17.5%	47.5%	23.0%	11.0%
Barry (2011)	15.3%	28.4%	47.8%	8.5%

Source: Vale of Glamorgan Council Annual Survey 2011 & National data from Experian Goad Centre report

Data on the Mon a Menai Regeneration Area towns of Caernarfon, Bangor and Holyhead has recently been captured by Action for Market Towns (AMT) on behalf of the local authorities as part of a town centre benchmarking survey. The table below summarises the data which has been assembled, based on the town centre units by Planning Use Class. The A1 retail combines use categories for Convenience, Comparison and Retail Services as used by Experian Goad elsewhere. The AMT “benchmark” assessment shows a much stronger presence of retail uses in Caernarfon and Bangor than expected across other North Wales towns or nationally. Retailing in Holyhead, however, is significantly lower and almost half the level of the larger Mon a Menai town centres. Business Service occupiers are broadly comparable across the town centres and the “benchmark” centres but a higher level of Leisure Services is prevalent in the Mon a Menai towns, especially Holyhead than might be expected from elsewhere; possibly reflecting the stronger tourism market these centres can support.

Table 5 - North Wales Town Centre Uses

	Caernarfon	Bangor %	Holyhead %	N Wales Large Towns %	N Wales Small Towns	National Large Towns %	National Small Towns %
A1 – Retail	62	62	34	55	53	53	53
A2 – Business Service	16	16	15	17	15	15	14
A3/A4/A5 Leisure Service	16	15	22	11	8	9	8
B1 Office	0	2	1	6	4	3	4
Other (Residential etc.)	6	5	28	0	0	1	0

Source: AMT Town Benchmarking Reports – Holyhead (September 2011); Caernarfon & Bangor (May 2012)

For Swansea, data has been captured from the 2006 City Centre Healthcheck report published by Swansea City Centre Partnership. This also presents the breakdown of shop units in the city centre by Planning Use class as shown in the table below. There is a much wider range of uses in Swansea City Centre, embracing more residential and formal B1 offices which inevitably reduces the proportion of units focused on retail activities. Nevertheless, some 46% of occupied units are in retail use and some 19% of units are Leisure Service activities.

Table 6 - Swansea City Centre Uses

Shop Units	Swansea 2006 %
A1 – Retail	46
A2 – Business Service	5
A3/A4/A5 Leisure Service	19
B1 Office	14
Other (Residential etc.)	16

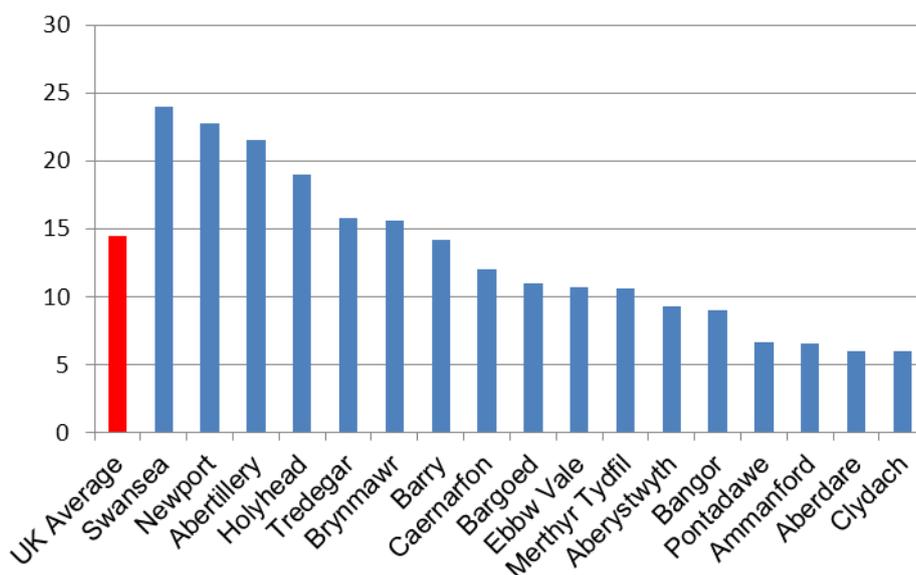
Source: Swansea City Centre Partnership Healthcheck 2006

6.5. Town Centre Vacancy Rates

The chart overleaf shows the current 2012 town centre vacancy rates (where available) from across the Regeneration Areas, compared with the latest UK average rate of 14.5%. The chart shows 6 out of the 17 towns, where data is available, are at or above the national average rate for town centre vacancies. Swansea, Newport and Abertillery all have town centre vacancy rates above 20%, which is around a third higher than the national average; with Holyhead only just behind at 19% overall.

Vacancy rates in Tredegar, Brynmawr and Barry town centres are all around the UK average whilst Caernarfon, Bargoed, Ebbw Vale, Aberystwyth and Bangor are showing vacancy rates at around the 10% mark which is more typical of the national situation in pre-recession times. Some of the smaller local centres of Pontardawe, Ammanford, Aberdare and Clydach demonstrate what might be considered reasonably healthy levels of “background” vacancy rates of around 6%.

Figure 2 - Regeneration Area Town Centre Vacancy Rates 2012



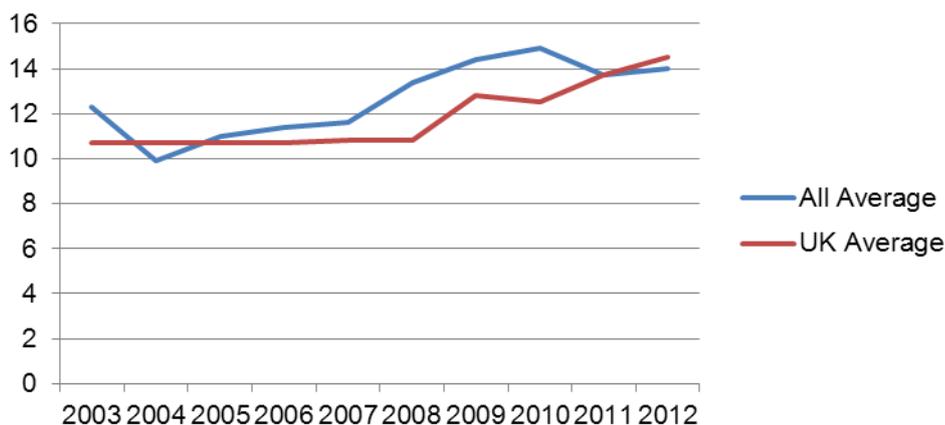
Source: PER Consulting Analysis 2012 from various sources. UK Average from The Local Data Company

6.6. Vacancy Rate Trends

The chart overleaf illustrates the trend in the average town centre vacancy rates across the Regeneration Areas (where data is available) tracked alongside the UK average vacancy rate trend line from 2003. Whilst there is some missing data from Regeneration Area towns in the early years, a more complete picture appears from 2006, showing vacancy rates consistently above the UK average trend line through the recession.

Average vacancy rates appear to have converged with the UK rate in 2011 and seem to have remained below the still rising national vacancy rates to 2012. This is still only a snapshot of town centres in the Regeneration Areas, however, which continue to show wide variation in individual performance as highlighted earlier and expanded on further below.

Figure 3 - Regeneration Area Average Vacancy Rates



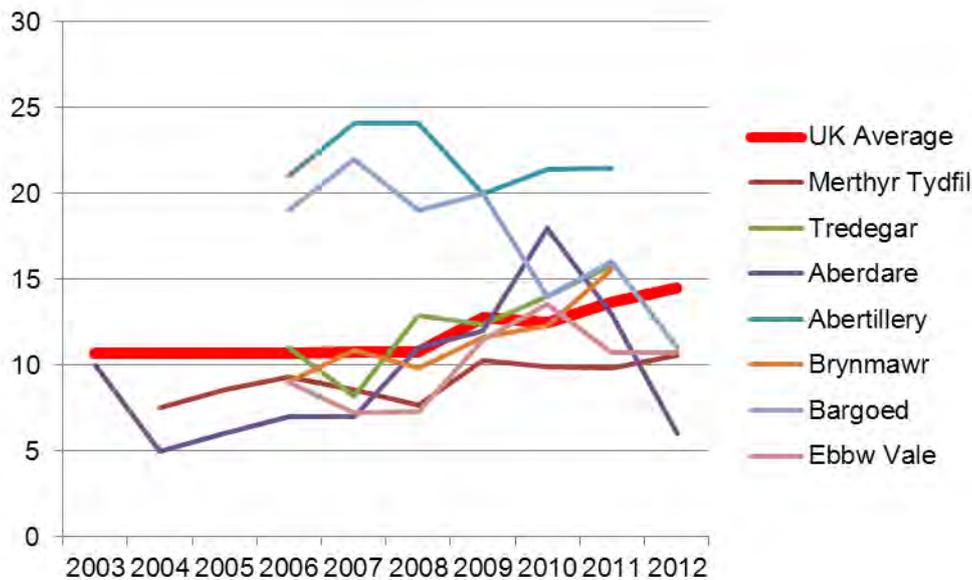
Source: PER Consulting Analysis 2012.

UK Average Trends based on Experian Goad and The Local Data Company

Heads of the Valleys

Data from seven towns in the Heads of the Valleys area is shown in the chart below tracked against the UK average vacancy rate trend line. There is a strong cluster of towns performing at or around the national average vacancy rate. Abertillery appears to remain stubbornly above national average trends and considerably above most of the other towns analysed in the Heads of the Valley Regeneration Area. Bargoed, on the other hand, has shown considerable improvement from “high” vacancy rates of around 20%+ in 2006/07 to below national average rate of 11% by 2012.

Figure 4 - Heads of the Valleys - Vacancy Rates



Source: PER Consulting Analysis 2012.

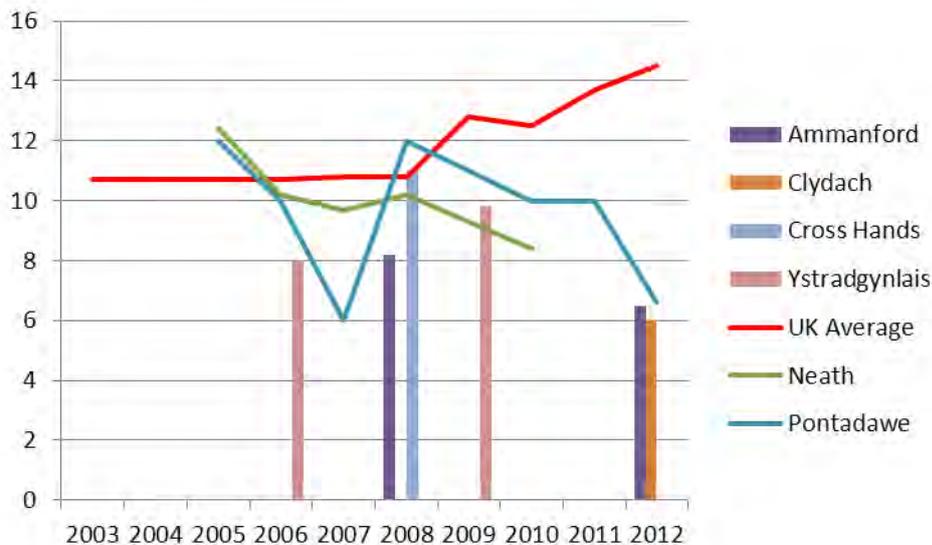
The trend line for Aberdare shows evidence of a strong performing town centre in the early 2000’s followed by a rapid increase in vacancy rates as the town clearly suffered the impact of the recession from 2007. Having reached a peak vacancy rate of 18% in 2010 the town appears to have recovered strongly returning to its previous low level of 6% vacancy rate by 2012.

Other towns, such as Merthyr Tydfil and Ebbw Vale have performed relatively consistently below the national average vacancy rate throughout the period shown in the graph above.

Western Valleys

Data for towns in the Western Valleys has been drawn from a variety of previous retail studies (providing single point data) and from personal site visits by the members of the team in 2012. Some trend data for Neath and Pontardawe to 2010 was provided by the local planning authority as illustrated in the chart overleaf.

Figure 5 - Western Valleys - Vacancy Rates



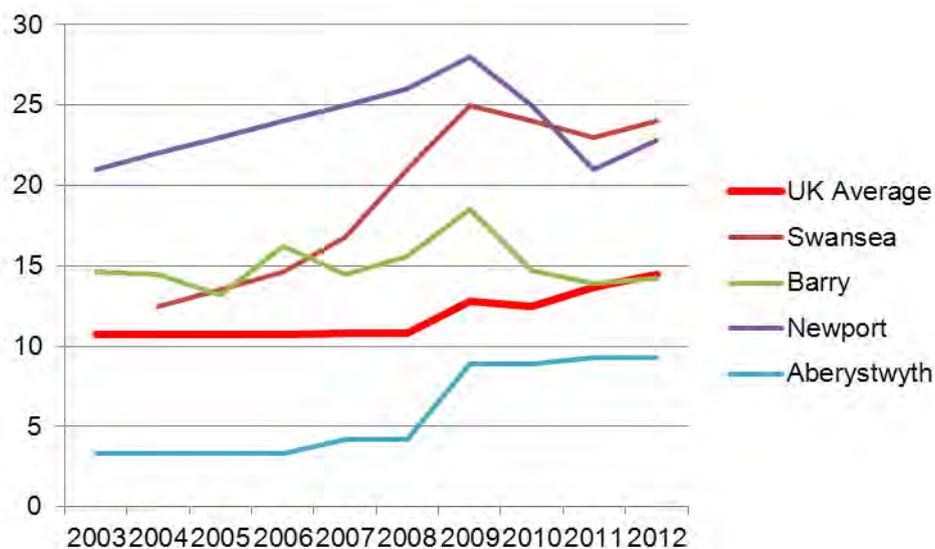
Source: PER Consulting Analysis 2012.

Town centre vacancy rates in the towns analysed appear to be well below national average levels, although it is difficult to determine what the underlying trends have been in more recent years. Many of the towns in the western valleys area, are relatively small towns (50 - 100 units) serving a local catchment and should be well connected with their local communities.

Larger Towns & Cities

The chart below groups together the larger towns and cities from the stand-alone Regeneration Areas of Swansea, Newport, Aberystwyth and Barry.

Figure 6 - Large Towns & Cities



Source: PER Consulting Analysis 2012.

This highlights the continued (and much documented) problems within the city centres which are suffering vacancy rates considerably above other towns in Wales and the rest of the UK.

Vacancy rates in Barry town centre have also been consistently above national average levels from the early 2000s and although increased sharply to 18.5% at the peak of the recession appear to have improved to similar pre-recession levels back in line with the UK average.

The data for Aberystwyth demonstrates a very strong pattern of economic performance with vacancy rates among the lowest in the UK and below 5% for much of the early 2000's. The town has clearly been affected by the economic recession with vacancy rates more than doubling since 2007, although remaining below the pre-recession UK average rate.

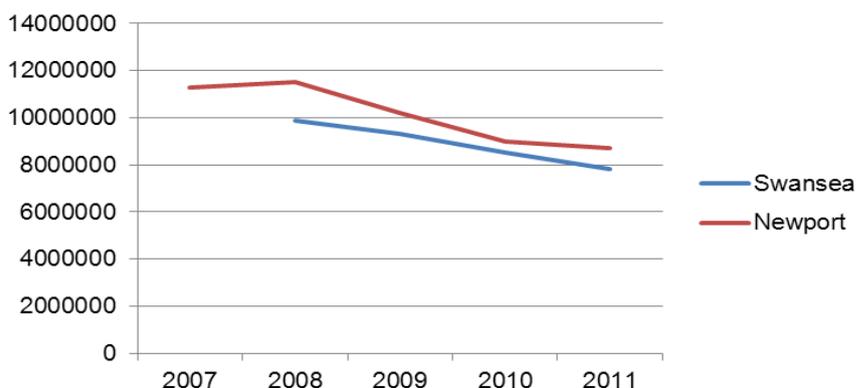
6.7. Town Centre Footfall Trends

Annual town centre footfall estimates have been assimilated from weekly data counts captured for subscribing local authorities, either by Experian or Springboard using automated counters installed in key locations. Not all town centres are covered by automatic footfall counters and we, therefore, only report on those centres where information exists.

There is inevitably an order of magnitude difference in footfall numbers between the major city centres in the Regeneration Areas and the more local town centres. Annual footfall in Swansea and Newport for example is currently around 8 million people, compares with around 1 million visitors for Ebbw Vale and Abertillery, 700-800,000 people a year in Brynmawr and Aberdare and around 500-600,000 in Tredegar and Bargoed.

Nationally, footfall counts in towns and cities have typically shown a decline of around 5-6% per annum since 2009. The chart below highlights the trends in footfall for Swansea and Newport, both of which have fallen in line with national trends indicated by Springboard data. Swansea has fallen by 21% from around 10 million visitors per annum in 2008 to 7.8 million visitors in 2011. Newport has declined even further, by 24% from a peak of 11.5 million visitors in 2008 to 8.7 million in 2011; although there have been more recent reports of Newport bucking the trend in week on week comparisons in the first half of 2012 which may be attributed to the increased student presence in the city centre.

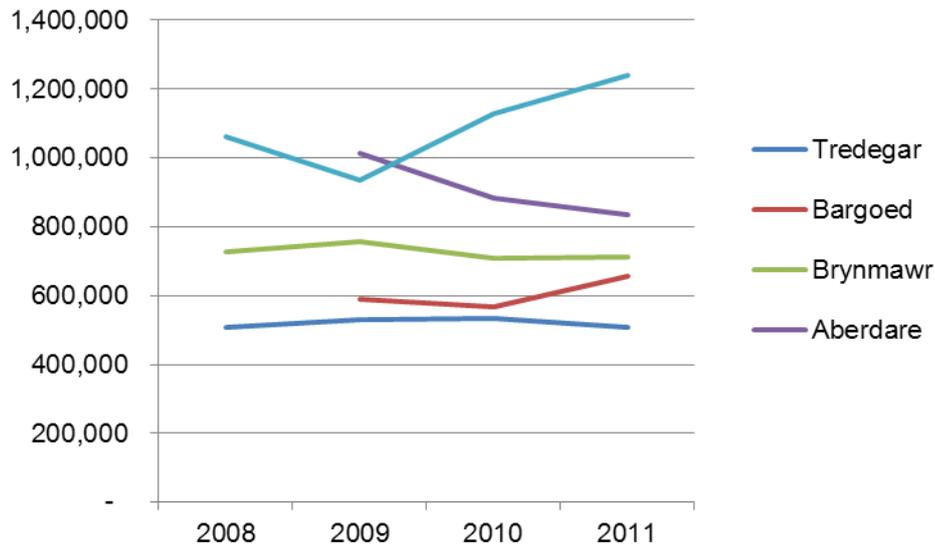
Figure 7 - Annual Footfall Trends - City Areas



Source: PER Consulting Analysis 2012

A more varied picture of footfall trends emerges in the smaller towns in the Heads of the Valley (HoV) Regeneration Area as shown in the chart below. Ebbw Vale has steadily increased its footfall over the past two or three years. In 2011, Ebbw Vale captured some 1.2 million visitors, up 10% per annum since 2009 which supports the recent improvement in vacancy rates. Bargoed has also shown a recent uplift in footfall, +16% from 2010 with 655,900 visitors in 2011, again reinforcing the improvement in the towns' vacancy rate.

Figure 8 - HoV - Annual Footfall Trends



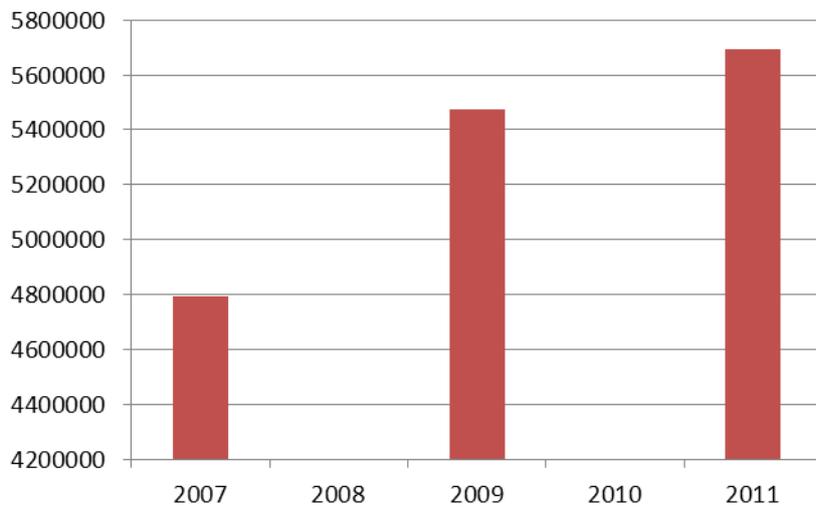
Source: PER Consulting Analysis 2012

By contrast, despite showing improvement in its town centre vacancy rate, Aberdare has continued to lose annual footfall numbers, 18% down since 2009 from just over 1 million to 835,000.

Footfall trends in Brynmawr and Tredegar are relatively flat, down only around 5% over the past three years for which data is available.

Footfall data for Merthyr Tydfil is shown separately in the chart below as there have been interruptions and changes to the way data is captured and the locations of the footfall counters in the town. Contrary to the experience of other centres, this appears to show an increase in annual footfall in the town centre since 2007 rising from 4.8 million in 2007 to just over 5.6 million in 2011. This may, however, be due to anomalies in the data capture rather than a real underlying increase. A more consistent footfall count will now be possible going forward from 2011.

Figure 9 - Merthyr Tydfil Footfall Counts



Source: Experian/MTCBC

7. On-line Survey Results

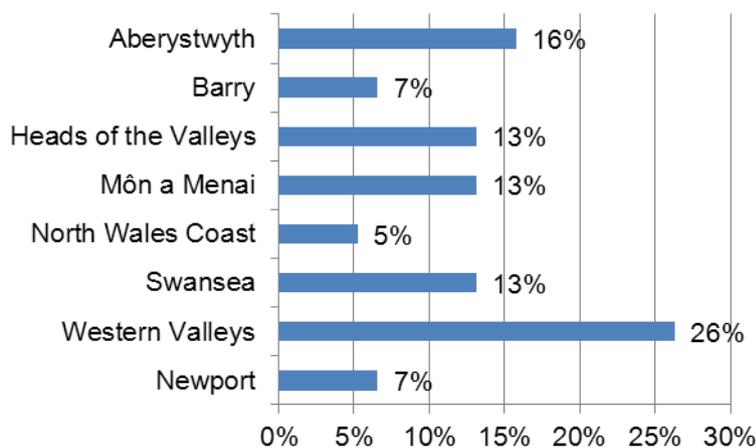
7.1. Response and Focus

During July 2012, an on-line survey was made available to the respective Regeneration Area partnerships. It was distributed to partnership board members, steering group representatives and, where applicable, to local authority town centre regeneration officers and local town centre networks.

A total of 72 responses were achieved, as follows:

- 41% Regeneration Area/URC partnership-board members,
- 6% members of the respective delivery team,
- 39% local authority officers,
- 10% local stakeholders and
- 10% from other organisations.

Figure 10 - Distribution of responses by Regeneration Area/Urban Regeneration Company



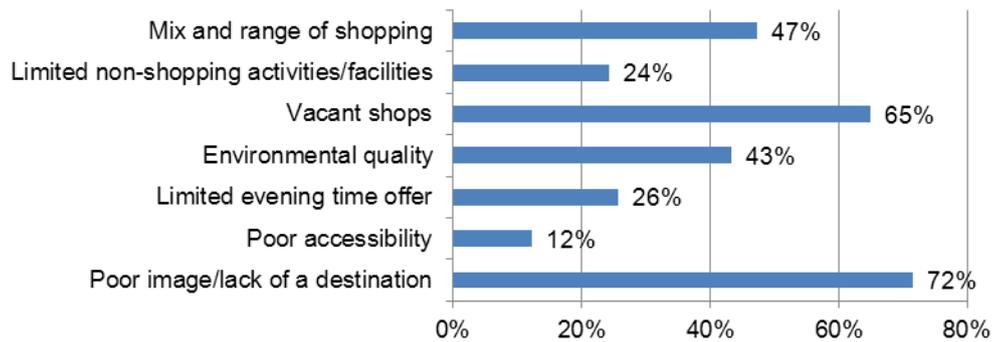
Source: Review of Town Centre Regeneration Online Survey, July 2012

When asked to what extent town centres have been the focus of Regeneration Area programme activity, 42% indicated that they had been the main focus, with 50% feeling that it was only part of their portfolio.

Town Centre Issues

When respondents were asked about prioritising the top three issues facing their town centre(s), poor image and lack of a destination (72%) was the main priority, ahead of (and possibly resulting from) vacant shops (65%) and the mix and range of shopping (47%). The general environmental quality (43%) has also been seen as a key issue, which will in turn impact on the confidence and perception of a place in terms of shopper and visitor satisfaction.

Figure 11 - Please prioritise the top three issues that have faced your town centre(s) within your area?

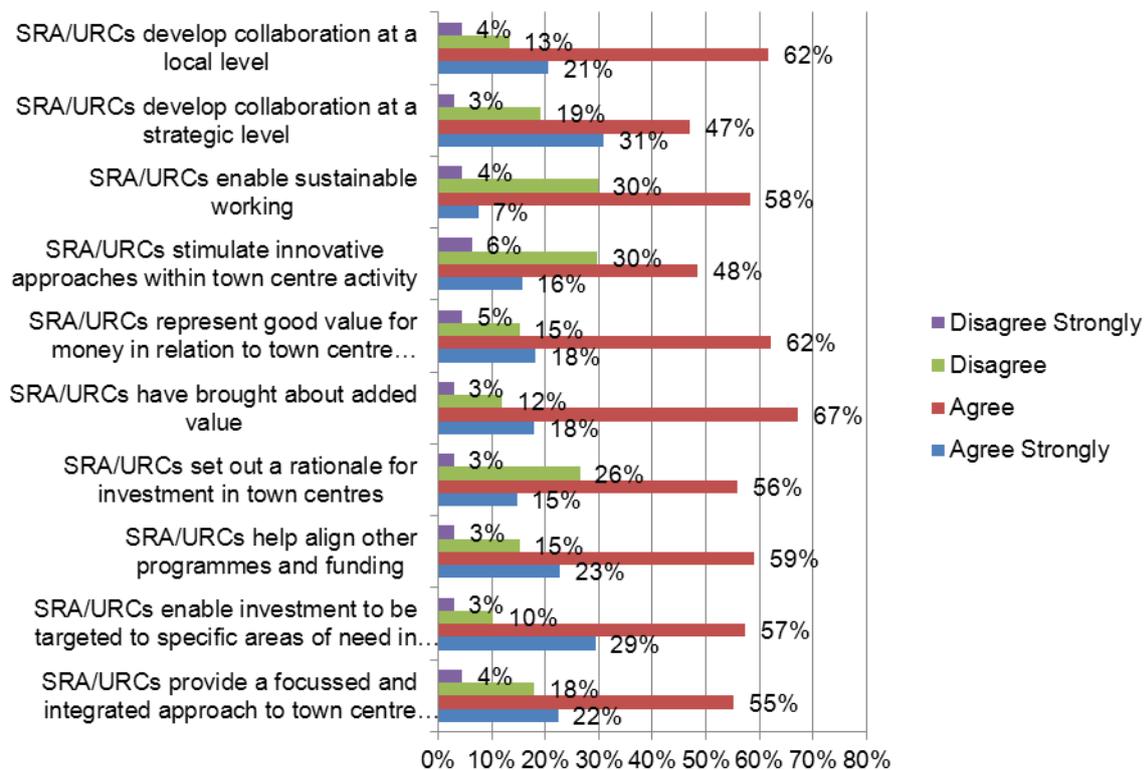


Source: Review of Town Centre Regeneration Online Survey, July 2012

Regeneration Area Partnership Working

Figure 12, below, indicates that respondents see Regeneration Areas as enabling investment to be targeted to specific areas of need in town centres through a strategic and collaborative approach, with a sense that it has brought added value to town centres. Where Regeneration Areas are not perceived to be successful is in relation to providing innovative approaches, providing sustainable working and not having a clear rationale for investment in town centres.

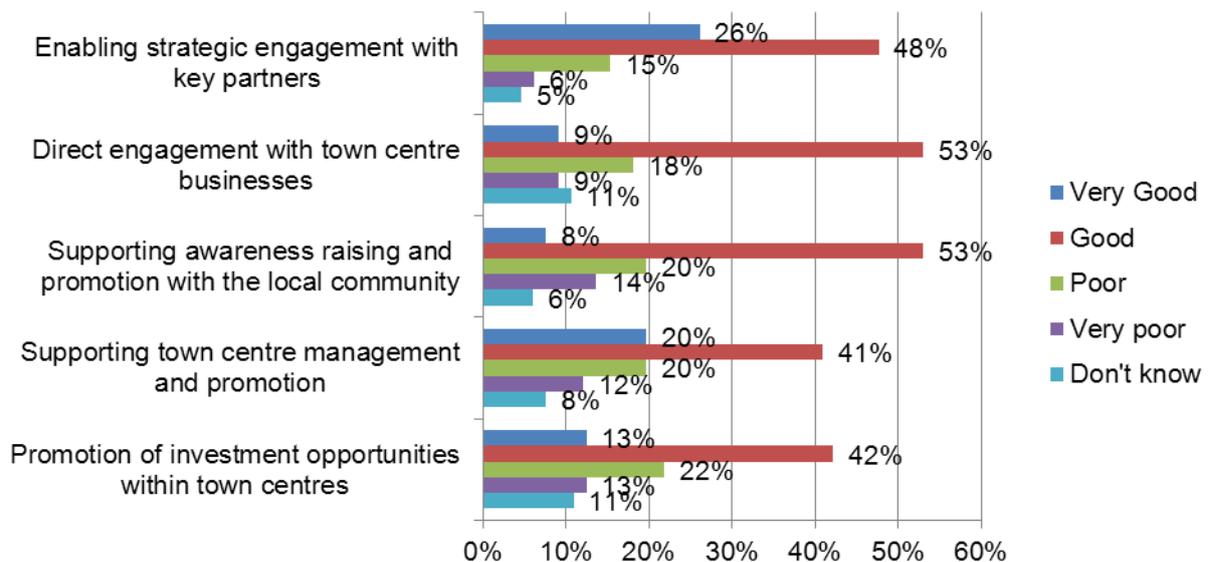
Figure 12 - To what extent do you agree or disagree with the following statements about town centre regeneration in your respective Regeneration Area?



Source: Review of Town Centre Regeneration Online Survey, July 2012

When asking respondents to rate communication and engagement within their respective regeneration areas, Figure 13 demonstrates that Regeneration Areas are perceived to be good at enabling strategic engagement with key partners at a board or steering group level but are marginally poorer at supporting awareness and promotion with the local community. We would assume that this liaison is led by the local partner but there is a perception that the Regeneration Area should have a more direct role in communication at a local level. Promotion of investment opportunities is not rated highly compared to other activities, which relates to inward investment and also working with local agents, landlords and businesses in levering in new occupiers or enhancing existing properties and businesses.

Figure 13 - How would you rate your Regeneration Areas/Urban Regeneration Company in relation to the following aspects of communication and engagement in town centre regeneration?

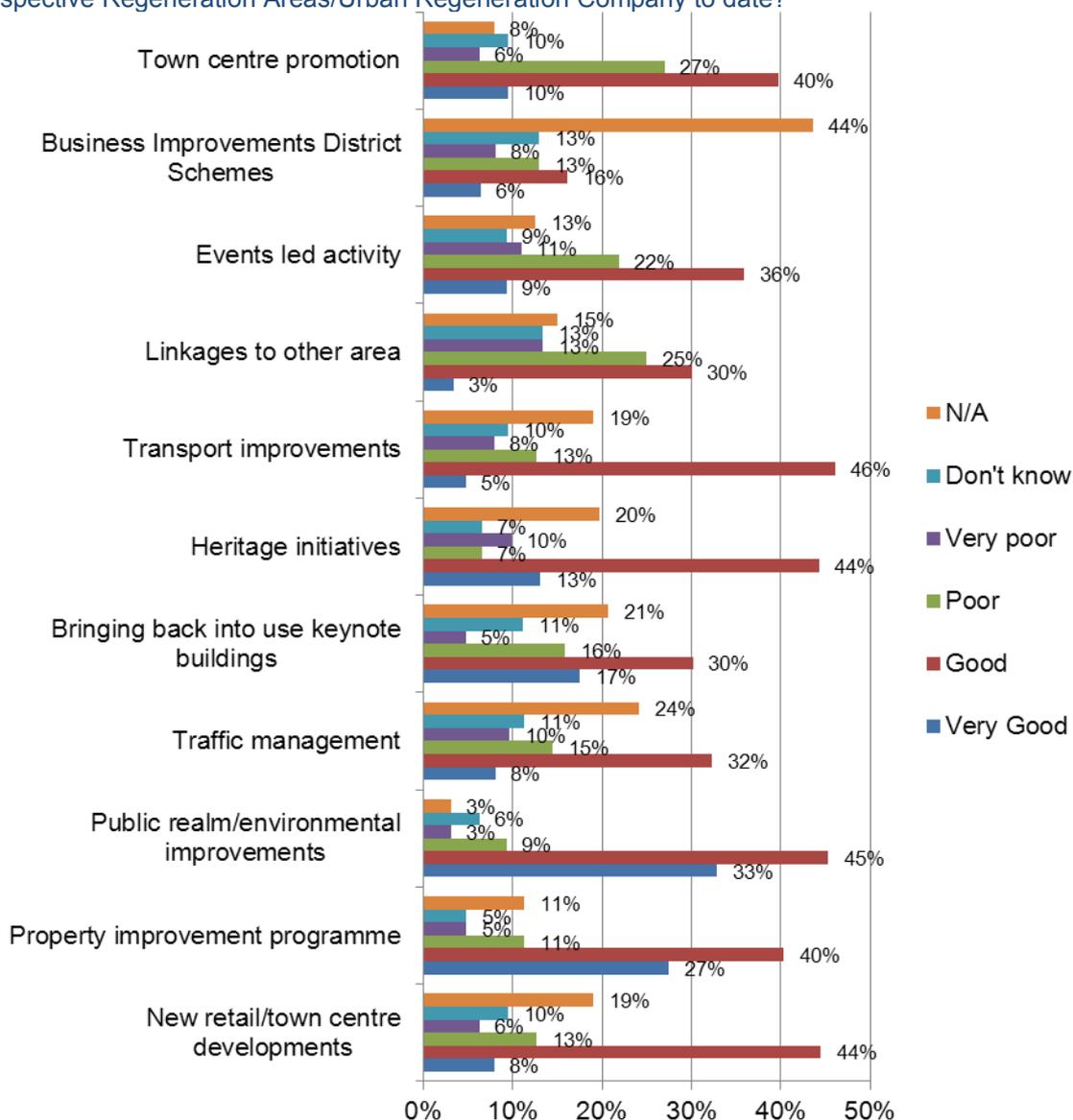


Source: Review of Town Centre Regeneration Online Survey, July 2012

Quality of Town Centre Regeneration Interventions

Figure 14 overleaf indicates that from the range of town centre regeneration initiatives implemented to date; public realm improvements, property improvement programmes, bringing back into use keynote buildings and heritage initiatives, are rated as being very good, with new retail/town centre developments and town centre promotion also being rated good. This demonstrates that built environment and hard landscaping-based projects seem to be well delivered in terms of skills and competencies in local authorities and other agencies. Where quality is lacking is mainly about linkages to other areas in terms of integration and ensuring synergy between physical projects as well as town centre management co-ordination.

Figure 14 - How would you rate the quality of the town centre regeneration projects within your respective Regeneration Areas/Urban Regeneration Company to date?



Source: Review of Town Centre Regeneration Online Survey, July 2012

The on-line survey also sought comments from strategic and local representatives about whether they could identify what has generally worked well.

Within physical regeneration there is a feeling that improving the quality of town centre environments does attract investment both locally and from outside, with one respondent stating that “investment enquiries are increasing”.

Respondents rated improvements to buildings and sites as demonstrating physical progress - from basic improvements such as “the buildings have been painted” through to Regeneration Areas activities creating new development opportunities in Swansea, with the knocking down of the St. David’s Centre and Oldway House which should in turn facilitate investment in development. However, some respondents, specifically from Rhyl, felt that physical activity has not happened in the town centre, as the focus has been on housing

issues, the promenade and tourism. This shows the wider remit and priorities that regeneration areas have and need to communicate about.

Transport and accessibility is also a key theme amongst success stories, with bus and rail station modernisation schemes being key to town centre economic growth and with projects such as bringing public transport and buses back into the town centre being key to the sustainable future of Welsh town centres.

Town centre management is seen to be supporting town centres on various levels in terms of event development, running training programmes, and helping with communication. The Purple Flag status that has been attained by Aberystwyth is also seen to attract events such as Halfords Cycling, Sea2Shore and the Photofest event.

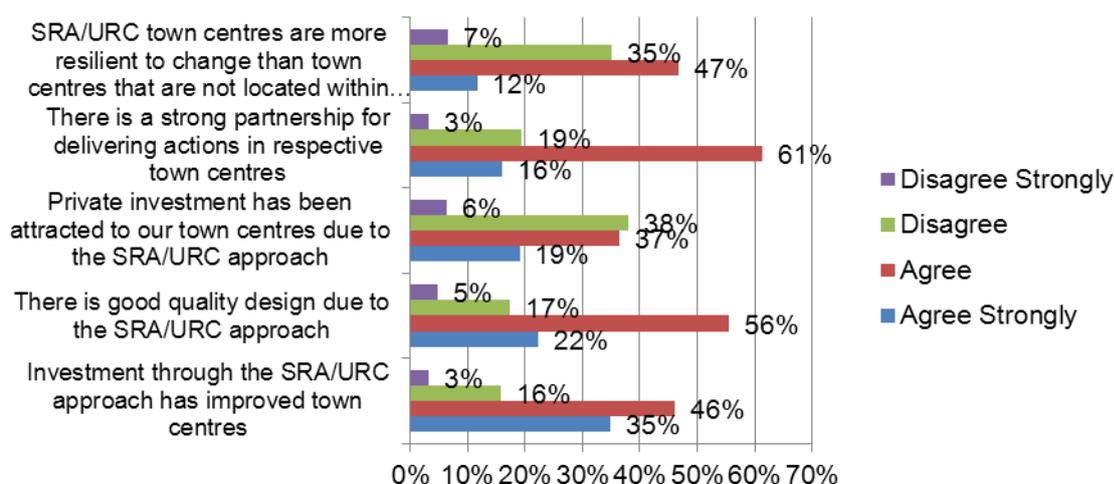
Empty shop initiatives such as the Holyhead Empty Shops Initiative are identified as key success stories, with some respondents attributing success to Regeneration Areas in terms of “bringing back empty shops into use by local people by negotiating low and rent-free periods with property owners, coupled with targeted financial support from the Regeneration Area to bring vacant premises up to a decent standard”.

Finally, in relation to the Regeneration Area process of delivery, some respondents to the survey felt that the integrated approach, partnership working, community involvement and support, and masterplans and strategies being in place all helped to secure a range of funding to deliver projects which support each other in turn.

Impact of Town Centre Regeneration

Figure 15 illustrates that the majority of respondents either collectively agree or strongly agree that investment through the Regeneration Area/Urban Regeneration Company has improved town centres, with strategic and local partner less in agreement that the approach has attracted more private sector investment and is resulting in Regeneration Area/Urban Regeneration Company town centres being more resilient to change than towns not located within regeneration areas.

Figure 15 - To what extent do you agree with the following statements about benefits and impacts on town centre regeneration in your respective Regeneration Area/Urban Regeneration Company?



Source: Review of Town Centre Regeneration Online Survey, July 2012

Barriers

When respondents were asked about barriers to delivery and impact of town centre regeneration projects and programmes with the Regeneration Areas, discussion points related to organisational culture of delivery, the current economic climate and some localised issues that have prevented progress.

Organisational culture and shape of delivery were identified as a barrier to delivery in terms of a lack of strategic direction, despite there being a town centre action plan, and a lack of ability to link opportunities. Specifically one commentator stated that “there has been no real focus on linking town centres through jobs and investments, Business Improvement Districts or other innovative initiatives. There was no real sharing of good practice across partners.”

At a local level, there were community issues such as de-trunking, parking issues and negative publicity that were perceived to be slowing down progress. These implied a need for stronger leadership and for some local partners to address “housekeeping” issues before tackling larger structural issues that face town centres.

The current economic climate, job redundancies in communities and the gradual build-up of out of town retail were also seen to be of significant scale, although progress is slow and that during the current window of town centre regeneration impact will be minimal. The economic situation was also seen by some local authority regeneration practitioners as having a direct impact on Council resources with regeneration not seen as a front-line service and at risk of contracting.

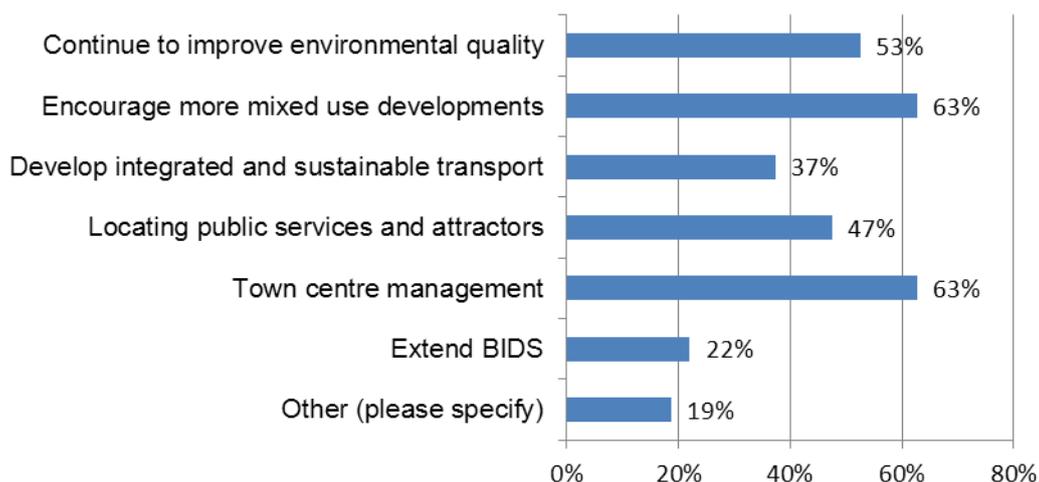
Lessons Learned

Key lessons learned to date by strategic and local partners included (verbatim comments):

- Upgrading of town infrastructure has been imperative and has had a huge positive impact on the town. However, the softer issues such as marketing, business support for small/independent retail entrepreneurs has always been lacking.
- Involve everyone at a very early stage including potential external funders to get buy in across the board.
- There needs to be sharper focus on outputs and outcomes that can be measured so that partners can understand the real impact of town centre regeneration monies.
- Newport is suffering the effects of planning decisions that have allowed the city centre to be weakened over time, especially retail developments on the outskirts. A way to effectively counteract this has yet to be found.
- The Holyhead Empty Shops Initiative (ESI) has been a successful pilot initiative to help people set up businesses in vacant premises, but care is needed not to impact adversely on existing businesses, and more attention is needed to town centre promotion and marketing.
- For the future I would use any Regeneration Area cash to add value to physical regeneration activities ONLY if there is demonstrable effect on creating opportunities for people - work and skills focussed.
- Funding needs to be available for more than 1 year at a time if anything long term and meaningful is to be achieved. The process needs to be more flexible and cut across more Welsh Government departments to work together.
- It takes time to achieve commercial redevelopment and assembly of sites for development.
- There needs to be much better cross-portfolio working within Local Authorities and Welsh Government.

- Grants need to be generous and targeted to tackle blighted buildings in town centres and public realm proposals need to be better coordinated within an agreed overall masterplan.
- The value of partnership working, strong links with Local Development Plan and regional working between Local Authorities.

Figure 16 - Please select the top three areas of activity/investment that town centre regeneration should be focussing on in the future?



Source: Review of Town Centre Regeneration Online Survey, July 2012

Figure 16 indicates that there is a need to improve the environmental quality of town centres, but there is also a need to further invest in town centre management and help facilitate mixed use developments within town centres so that we are not pursuing a solely retail-led agenda but looking at how we have a new focus for our town centres.

A specific comment from the on-line survey also highlights the need for town centres to be places that generate employment and foster skills development, especially for young people. There is also a strong theme through this report and through our visits to regeneration areas that we need to build the brand and image of places, creating town centres as destinations for a range of leisure, cultural, entertainment and raising awareness of its focus and distinct offer. Whilst some people want to see more big name stores that create footfall, others want to see help for independent businesses with economic growth built from within communities and not reliant on nationals.

To underpin town centre brands, some respondents use the examples of the Wales Millennium Centre in Cardiff Bay as iconic building that act as a landmark and a catalyst for further investment and regeneration in Cardiff. Town centres need these iconic catalysts of change.

8. Individual Regeneration Area Summaries⁶⁷

The following overviews summarise approaches to town centre regeneration across the respective Regeneration Areas.

8.1. Aberystwyth

Impact and Value for Money

The town centre-focused regeneration programme for Aberystwyth has a physical focus requiring development, design and engagement with the community. Visible actions include commercial improvements along Pier Street with the main train station frontage and bus interchange being enhanced as a key arrival point into the town centre. Future actions around the Town Clock, the Market Hall, the Mill Street retail development and improvements along the Promenade will start to create a cohesive and distinct destination as well as continuing to develop the wider town centre offer.

Partnership Working and Added Value

The Strategic Partnership Board represents a wide cross-section of town interests and has an understanding of where they want their town centre to be in terms of economic function and its place within Ceredigion. The programme is seen by partners as having a short timetable, with projects only starting to be implemented and joining together. A combination of the Purple Flag status for the town centre management and an events-led programme has put the town centre on the map for arts, cultural and sporting events, but there is a need to sustain and develop activities that meet local and visitor needs.

Recommendations for Future Interventions

Understanding Your Towns: Baseline Data for Monitoring & Management

There is no gathering of town centre vitality and viability figures with only footfall/vacancy counts available up to 2006. A baseline report on perceptions and usage across town centre activities has been conducted but this has no town centre data. There needs to be a coordinated approach within local partners to collect and retail and visitor data so that impact can be measured.

Integrated Regeneration and Investment Planning

There is a sound rationale for the direction and type of regeneration activities within the town centre which is based on a masterplan document, a baseline document and some CACI development appraisals. Comprehensive urban design studies have been undertaken for the Promenade and Town Clock area in addition to the train station area, and these are starting to show visible progress in terms of physical works, along with securing key tenants for the Mill Street development site. The programme needs to continue with its key strands of investment so that their coverage of activity is maintained and key sites, spaces and streets are connected to present a distinct town centre with a quality retail and seaside town offer.

Local Partnership Building and Organisational Development

⁶ Full reports of each Regeneration Area are set out in Annex 1 of this report.

⁷ The full list of case studies is set out in Appendix 2 of this report.

There has been some partnership working at a local level which has led to managing the evening time economy, developing local branding and providing innovative projects, such as street pastors, Pubwatch schemes as well as attracting key events such as the Halfords tour series to the town. Integration of town centre management within the town needs to be addressed in terms of a strategic and local partnership that manages environmental management, in addition to marketing and promotion and business development.

Strategic Planning and Development Control

The key objective for Aberystwyth is to provide a good range and choice of retail and complementary attractors in the town centre. Key administrative, health and educational institutions are located close to the town centre and this has helped underpin its strategic hub role - with town centre sites assessed for commercial uses that meet notable gaps in retail provision.

Prioritisation and Sustainability of Investment in Physical Infrastructure

The main priority is to enhance the environmental quality of the town centre in terms of key commercial streets, announcing its main arrival spaces, maximising the Promenade in terms of events, activities and new attractors and the re-use of existing assets such as the Market building, to extend the retail circuit to present visitors with an opportunity to explore. This also needs to be supported by an integrated brand and support for developing key clusters of retail products that are distinct and add value to the town's physical characteristics and wider offer.

Development and Inward Investment

The Regeneration Area partnership process has helped realise commercial opportunities with Welsh Government, Ceredigion County Council and local partners coordinating the promotion of the Mill Street site, which features new Tesco and Marks and Spencer stores anchoring the site and provision of a multi storey car park. This has been achieved through developing shopping intelligence, producing marketing information and helping with the land assembly and associated processes. Complementary support for local business growth through property improvement grants, mentoring and training should be made available to ensure consistency of product and experiences within the town centre.

***Aberystwyth Purple Flag Status: "Working together to provide a safe, beautiful and vibrant Town with something for everyone."*⁸**

The approach to managing the evening time economy in Aberystwyth has been accredited with a Home Office/ATCM/Diageo Purple Flag status in terms of how it has developed the well-being, movement, its appeal and developed it as a place. This involved initiatives such as NTE (Aber@Night joint patrols), health improvement campaigns such as developing customer care through Best Bar None, Safer Drinking booklets, Pubwatch and noise awareness campaigns such as Sshhh. The



⁸ The full list of case studies is set out in Appendix 2 of this report.

programme of activity has looked at development of events such as the Food and Drink festival, the Halfords Tour Bike Race and the Ffoto Aber Photography competition. At a street level, integrated signage and information points and QR code technology in Tourist Information Centres has been developed, amongst other measures.

8.2. Barry

Impact and Value for Money

Whilst improving the town centre features as an important priority for the Barry Regeneration Area Partnership, only limited direct intervention has been delivered to date. There has been no substantive impact on the “vitality and viability” of the town centre during the lifetime of the Barry Regeneration Area. Town centre vacancy rates remain above the national average at 14.2% in the town at 2012; although this is down from the “peak” rate of 18.5% in 2009.

Partnership Working and Added Value

The Barry Regeneration Partnership has taken time to mature into its role. There were delays at the outset, to fully engage with the local community and stakeholders to establish a consensus view on priorities. This was crucially important, however, to overcome the local mistrust and fears of “top-down” decisions on investment.

Whilst the partnership has responded positively to building this local commitment to priorities, it appears to have missed opportunities to act in a more forward thinking, strategic manner. The lack of other European funding programmes in Barry has potentially meant the Regeneration Partnership has had to fill the void and support a much wider range of local community projects which have no other avenue of support. The Partnership has also had to assist in community capacity building to ensure local groups are more soundly based to deliver capital projects. These are all positive outcomes from the Partnership approach which has previously been missing in the area.

The Partnership has also maintained on-going dialogue on major projects and as the final year of funding approaches is beginning to think and act more strategically in looking into options for using the funding to enable/prepare the way for future development which may have a more significant impact on the town centre and on Barry as a tourism destination.

Recommendations for Future Interventions

Understanding Your Towns: Baseline Data for Monitoring & Management

The Vale of Glamorgan Council maintains close and active monitoring of town centre performance data, reaching back to 2003, and is currently preparing a Framework to guide the future improvement of all town centres in the County including Barry.

Integrated Regeneration and Investment Planning

As a single place partnership, there are clear links between strategic planning and investment planning within the Barry Regeneration Area, with an emphasis on using the Regeneration Area funding on joining communities with the larger scale private investments taking place on the Waterfront.

Local Partnership Building and Organisational Development

The Regeneration Area Partnership has invested considerable effort in building local capacity and organisational development, with the Vale Council providing specific additional revenue support to help local communities develop project proposals. Indeed, local capacity building has been an importance consequence of the Regeneration Area Partnership due to previous lack of coordinated funding sources as Barry has not benefited from the ERDF European funding support.

Strategic Planning and Development Control

Care has been taken in managing the planning permissions in respect of the Barry Waterfront development, which includes retail provision by ensuring strong linkages are maintained with the town centre.

Prioritisation and Sustainability of Investment in Physical Infrastructure

The focus has largely been on investment to support sustainable local communities which is seen as a pre-cursor to improve local capacity and confidence in the town centre.

Creative Retail Growth & Support

There has been no direct intervention with local retail businesses.

Development and Inward Investment

The Barry Regeneration Area Partnership has worked in parallel with major development proposals being established for the final phase of the Barry Waterfront project, which will create over 2,000 new homes and create a vital link road to Barry Island. Other strategic investment projects, including plans for Barry Island, have progressed more slowly due to the impact of the recession, but could in time herald a major break-through for the future of Barry as a tourist resort and subsequently on the viability of the town centre.

Thompson Street Barry: Public Realm Improvements Connecting the Town Centre⁹

An early “quick-win” investment was achieved in Barry to improve the public realm and environmental quality of Thompson Street which connects the new Waterside development with the town centre and reinforces the adjacent housing renewal work.



⁹ The full list of case studies is set out in Appendix 2 of this report.

8.3. Heads of the Valleys

Impact and Value for Money

Town centres have had a major focus within the Heads of the Valleys programme activity in terms of physical regeneration, town centre management support and alignment to other activities such as tourism, arts and culture. An integrated approach to delivery has emerged from the regeneration process, but it is too early to measure the impact and value for money of the respective activities, as significant structural work has yet to be completed and this will have a significant effect on enhancing the condition and perceptions of the town centres.

Partnership Working and Added Value

At a strategic level, town centres have come together and collaboration has been enabled by the town centre lead within Welsh Government and by respective local authorities through the town centres group and the Valleys Renaissance group. Spatial thinking and sharing best practice is developing in terms of activities such as ICT, marketing and connectivity. A number of local delivery and partnership models exist, including business forums, Business Improvement Districts and town centre partnerships.

Recommendations for Future Interventions

Understanding Your Towns: Baseline Data for Monitoring & Management

It is clear that some town centres have designed systems to monitor activity and how their investment is impacting, although others are not collecting data because of capacity and resourcing issues. There is a common theme about data being obtained from a variety of sources, but sometimes lacking a consistent approach and with no in-depth analysis of what the raw results mean or how they could be used to understand trends or where interventions have impacted.

Integrated Regeneration and Investment Planning

There are examples of integrated regeneration approaches in places such as Bargoed and Merthyr Tydfil, where a long term and holistic view of how town centres need to be planned, managed and promoted is developing. Nevertheless, significant investment is being injected to turn these towns around via a multi sector approach to realising assets, improving infrastructure and developing identities that reflect local values and appeal to visitors.

Local Partnership Building and Organisational Development

There are a number of models for local town centre partnerships, with some local authorities looking to Business Improvement Districts and others to ensuring a corporate response to the running of town centres through a systems-based approach to environmental and business engagement. The approach taken depends on the scale of the towns, and there is a future challenge for some councils in safeguarding the town centre management function in the current economic climate.

Strategic Planning and Development Control

The close proximity of town centres within the Heads of the Valleys and the topographical nature of valleys settlements has resulted in the need to develop the unique selling points for individual town centres and to ensure linkages to out of centre retail parks so that linked trips are maintained. There is a tension between retaining retail expenditure town centres and

catchments in terms of larger nationals and how these are accommodated within wider town centre footprints.

Prioritisation and Sustainability of Investment in Physical Infrastructure

The main focus has been on the environmental quality of town centre environments, improving the general condition of properties, re-use of key note buildings and improving accessibility across the town centres.

Regeneration Skills

The Heads of the Valleys area has some strong skills in environmental improvement in terms of public realm, managing the re-use of historic buildings and transportation improvements. It has also been developing various models of town centre management for varying levels of town centres, as well as piloting ideas around web-based retailing, place-branding, business mentoring and other innovative activities. There is a need to share this amongst other Regeneration Areas in terms of best practice as well as learning from other town centre partnerships in Wales.

Development and Inward Investment

The Bargoed Case study demonstrates how local authorities and strategic partners can realise town centre sites in terms of land assembly, transport improvements and understanding how large retail schemes need to fit with the townscape of valleys communities. Other examples including business investment marketing through web-sites, investor portfolio packs and development of town centre brands.



The Big Idea in Bargoed demonstrates the strategic nature of planning change within a community that has faced major structural changes in its industry and identity. The need to develop a place through transport, connectivity and re-positioning itself in terms of both physical outlook and setting is key to planning phases of work that tackle physical barriers and challenges. The approach has also put in place a wider strategic resource to manage the change through town centre management, so that existing businesses and new investors are cared for.

The programme of investment also shows how strategic partners can unlock opportunity with the Morrison's scheme a good example of a joint partnership between Welsh Government and the local authority in ensuring an integrated scheme that will have direct linkage with the fabric of the town, thereby ensuring additional benefits for existing businesses as well as re-enforcing as a District shopping centre.

¹⁰ The full list of case studies is set out in Appendix 2 of this report.

8.4. Mon a Menai

Impact and Value for Money

The case studies for Holyhead and Caernarvon both highlight the need for clarity of the town vision and choice as to whether to focus primarily on the local community as the main town centre users or equally on existing and potential visitors.

Partnership Working and Added Value

Mon a Menai is a geographically dispersed regeneration partnership but has made inroads in developing an area-wide focus on town centres including sharing of good practice.

Recommendations for Future Interventions

Understanding Your Towns: Baseline Data for Monitoring & Management

Recent town centre 'benchmarking' for Holyhead, Bangor and Caernarvon gives a comparative understanding the town centre functions, issues and stakeholder perceptions and a good sense of potential progress -the so-called 'town trajectories'- that suggests that the two Gwynedd towns are closer to becoming 'towns of opportunity'.

Integrated Regeneration and Investment Planning

The Holyhead and Caernarvon case studies demonstrate the joint pursuit of economic and social regeneration and mix of 'hard' and soft 'regeneration' skills through the Mon a Menai Regeneration Area and the Plas Cybi Communities First initiative.

The Mon a Menai Programme Strategy provides a framework for ensuring that 'twenty-first century drivers' such as low carbon principles are applied in town centre regeneration.

Local Partnership Building and Organisational Development

The case study of Caernarvon highlights challenges and opportunities for sustaining long-term regeneration activity through financially viable community enterprise.

Strategic Planning and Development Control

The Holyhead case study illustrates the importance of understanding the impact and inter-relationship between peripheral developments such as the retail park and the town centre.

Prioritisation and Sustainability of Investment in Physical Infrastructure

Proposals for future investments in refurbishing iconic buildings in Holyhead town centre and transforming the public realm around Slate Quay in Caernarvon show an appreciation of the role of these investments in underpinning future sustainability.

Creative Retail Growth & Support

The business support provided as part of the Empty Shops Initiative in Holyhead is an example the creative approach to retail growth needed to complement physical improvements and boost local community and business confidence.

Development and Inward Investment

The Caernarvon case study demonstrates an understanding of the need to enhance social, community and tourism development to enhance the inward investment prospects.

Caernarfon Town Centre: Designs on Making a Good Town Great¹¹



The case study of Caernarfon presents it as a 'town of opportunity' needing to find a way to balance its retail, administrative and tourism functions. It portrays the pursuit of a holistic approach to town centre regeneration focused on improvements in public realm and heritage for their wider cultural, community and commercial value.

The case study also provides important insights in to organisational and financial mechanisms necessary to sustain town centre regeneration activity in the long-term through community enterprise. It also shows the value of performance monitoring as a management tool to help partners to track changes in key town centre issues and community perceptions.

The Holyhead Empty Shops Initiative: Symbolic Turning Point for Town Centre

The *Holyhead Empty Shops Initiative* represents a symbolic turning point in the long-term regeneration of a town centre that three years ago had the UK's highest retail unit vacancy rate. The case study also brings together the application of economic and social regeneration through the joined-up delivery of the Regeneration Area and Communities First initiative.



Future opportunities and challenges include the refurbishment of two iconic town centre buildings and the creation of a financially viable delivery body to help sustain town centre regeneration. In delivering these town centre improvements and coordinating activity with these wider developments, it will be important to determine whether the sole purpose of Holyhead town centre is to serve as a good quality local service centre for residents or whether it can also be a significant destination for visitors.

8.5. Newport

Impact and Value for Money

From our enquiries it is believed that Newport Urban Regeneration Company has (and continues to have) a significant impact on the city centre regeneration. The physical, transport and environmental improvements have transformed the image and appearance of

¹¹ The full list of case studies is set out in Appendix 2 of this report.

the city centre. The establishment of the University City Campus has helped increase footfall in the centre and engendered a modern/confident identity. Plans for new retail development have been rescued from the recession and there is every confidence the city centre expansion will be delivered. New office development is also due to start on site soon increasing the city centre employment base. Investment is also being made in public realm improvements which will help unite the existing town centre with the new development and encourage existing traders to realise economic benefits.

Although outside the scope of this review, the wider economic impacts achieved to date are expected to show considerable value for money return on public investment. The 2010 Interim Economic Evaluation highlighted good initial progress and there has been much more investment achieved in the city centre since then.

Whilst there are positive signs of moving in the right direction in transforming the economy of Newport, this has not yet filtered through into the commercial/retail performance of the city centre. Shop vacancy rates remain stubbornly high as operators continue to await the long promised retail investment which, subject to funding is expected to be complete by 2015.

There is, however, a very clear strategy in place and sound and robust targets which are closely monitored against delivery.

Partnership Working and Added Value

The Urban Regeneration Company (URC) vehicle is a very distinctive and focused project-delivery approach which is very different to the management focus of other Regeneration Areas. The URC plays a strong, co-ordinating role and is very “hands-on” in delivery of agreed projects and programmes, commanding a reputation for private sector engagement and action.

Newport Unlimited has had a particular remit to transform the economy of Newport and strengthen the performance of the town/city centre as retail/leisure/cultural and commercial destination. This has been an enormous challenge, but there are strong signs of the URC achieving its aims with the projects it has delivered to date and the private sector agreements which are in place for future development in the city centre.

Whilst focused on “delivery”, the URC is also connected to wider social and community regeneration objectives through its partnership with the City Council. The strong private sector representation on the Board has helped maintain a “results focused” culture.

Furthermore, from our discussions we can see significant advantages of the approach which has been followed allowing the “partnership” engagement to operate at the strategic policy level (led by the City Council) with the URC maintaining the delivery skills as a co-ordinated and focused organisation.

Recommendations for Future Interventions

Understanding Your Towns: Baseline Data for Monitoring & Management

Newport URC and the City Council have maintained a strong and active position in monitoring the city centre performance and future potential which has been essential in positioning the development opportunities in the minds of the private sector developers.

Integrated Regeneration and Investment Planning

Newport URC has been a strong driving force in positioning the strategic regeneration objectives for the city and aligning this with public and private investment proposals.

The Central Area Masterplan (2004) provided the broad framework for regeneration which was updated in the Masterplan Refresh (2010). The overall strategy for Newport City Centre has been for a comprehensive and integrated approach improving access, bringing forward key development sites for housing, offices and retail and enhancing the quality of the spaces in between buildings and re-establishing the links with the river. The URC's role in mobilising the physical regeneration was augmented by its wider remit in place marketing and promotion to attract inward investment from business and increase the economic activity in the city.

Local Partnership Building and Organisational Development

The URC model provides a focused delivery vehicle for regeneration, with a priority towards external and private sector engagement to stimulate inward investment from developers and business occupiers. Newport City Council retains the wider community partnership responsibilities and ensures the plans for Newport are communicated locally and integrated with other community regeneration priorities.

This approach has allowed the URC to strike an appropriate balance and maintaining a strong momentum in development delivery even through the recession.

Strategic Planning and Development Control

The close working partnership between the URC and City Council as Local Planning Authority has helped embed the regeneration plans within planning policy supporting local development control decisions. The original Masterplan helped inform the then Unitary Development Plan and was later adopted as Supplementary Planning Guidance by the City Council. This has stood the test of time and with the recent update continues to inform the emerging Newport Local Development Plan.

Prioritisation and Sustainability of Investment in Physical Infrastructure

Newport URC has taken a comprehensive approach to the regeneration of Newport City Centre, taking account of the needs for sustainable transport improvements, physical infrastructure design, and the integrated approach to city centre living, working and education with the development of the University City Campus.

Development and Inward Investment

Newport Unlimited is spearheading an ambitious transformation agenda for the city of Newport and the wider regional economy. Overall, the URC is overseeing an investment programme in excess of £120 million of public sector investment which has the potential to generate some £1.6 billion of private sector investment in development projects and local job creation.

Regeneration Skills

The emphasis of the URC vehicle approach has channeled very strong development delivery skills alongside the wider community and planning skills which existed within the City Council. This was essential to build confidence with the external market and has generally weakened in Wales since the abolition of the Welsh Development Agency.

8.6. North Wales Coast

Impact and Value for Money

The Colwyn Bay case study demonstrates the importance of a clear town vision and tight geographical focus in delivering an early impact, although integration with town-edge sites and between resident and visitor needs remains a 'work in progress'. Progress in Rhyl has been challenging because of a prerequisite to deliver large-scale housing renewal, embedded ways of working and some initial political resistance.

Partnership Working and Added Value

Whilst partners within Denbighshire accept the value of introducing a new culture, there is recognition from all that this has not always made progress easy. In contrast and as demonstrated by the case study, the early clarity of vision and support within the smaller area in Conwy enabled swift progress.

Despite the benefit of themed-sub-groups and specialist secondees, bringing together other Welsh Government departments such as health and education to share a place-based focus has been challenging. In contrast, relations with adjacent the Communities First programmes have been productive in both Rhyl and Colwyn Bay.

Recommendations for Future Interventions

Understanding Your Towns: Baseline Data for Monitoring & Management

Whilst there is anecdotal evidence that activity is helping Colwyn Bay town centre to 'turn the corner', up-to-date monitoring of impacts would help monitor this change and the outcomes as this transformation is completed.

Integrated Regeneration and Investment Planning

The Colwyn Bay Master Plan and the wider development proposals emphasised the importance of integration between the town centre, residential areas and major visitor attractions at the Waterfront and Parc Eirias.

A draft review of Rhyl Going Forward's Strategy is calling for more decisive local leadership to develop fewer, more self-reliant projects that tackle the "causes rather than symptoms of decline".

Local Partnership Building and Organisational Development

The North Wales Coast Action Plan recognises the importance of developing stronger, independent leadership in the North Wales towns that is able to develop and sustain key improvements. The council-led BayLife+ is helping achieve this in Colwyn Bay whilst a Town Centre Forum is bringing stakeholders together in Rhyl.

Strategic Planning and Development Control

Whilst not under the auspices of the Regeneration Area directly, two planning and development control issues were raised in discussions with stakeholders that appear to go contrary to the wider town centre regeneration: Namely a change of use application and permitted retail development in Prestatyn.

Prioritisation and Sustainability of Investment in Physical Infrastructure

A key success to-date is the way that regeneration in Colwyn Bay has been undertaken in a coordinated way to deliver major capital works that will attract new visitors to the edges of the town and provide very high quality facilities for local use.

Regeneration Skills

As major capital works are completed in Colwyn Bay, it becomes increasingly important to develop a sustainable programme of events, promotional activities and the attraction of inward investment.

Development and Inward Investment

Despite notable, publicly-funded capital schemes in Colwyn Bay, there is a concern that the town still struggles to attract necessary private sector investment.

Managing Transition and Maintaining Momentum

Although it is accepted Colwyn will have a much smaller proportion of direct funding in future, Conwy officers still value the 'special' status that helps in levering-in other funds.

In Rhyl, the future challenge will be to maintain the progress in culture and approach achieved, whilst meeting the challenges of reduced funding and with a tighter focus on the inter-relationship between the necessary housing renewal programme, the role of the town centre and the status of Rhyl as a seaside destination.

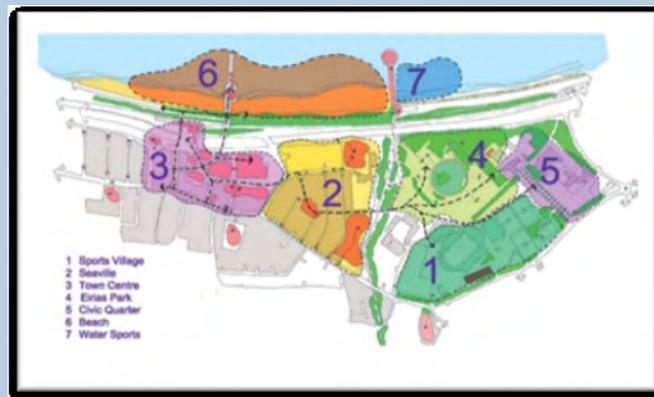
Colwyn Bay and Bay Life+: Coordinated Delivery According to Plan¹²

This case study shows the value of strategic planning, strong local leadership and an integrated mix of interventions in helping to revive the fortunes of a small town centre.

By investing revenue resources in to the Bay Life+ project for Colwyn Bay; Conwy County Borough

Council has been able to maximise opportunities as part of the North Wales Coast Regeneration Area and lever-in other external funding to deliver its vision and plan. This plan integrates the development of different locations and socio-economic themes across the town in a way that seeks to enhance the pivotal role of the town centre. Bay Life+ activities show an awareness of the dual importance of pump-priming capital investment and the necessary revenue streams to make the most of these.

The plans also show an appreciation of links to the wider economy and the need to complement the roles of neighbouring towns.



¹² The full list of case studies is set out in Appendix 2 of this report.

8.7. Swansea Regeneration Area

Impact and Value for Money

Whilst there is obvious, localised visual improvement in parts of the city centre, the impact of the recession continues to hold back more substantive efforts to improve the commercial and economic prospects of Swansea. The city faces deep-rooted challenges that are very difficult to change through physical intervention alone, but the Strategic Framework for the city provides a clear basis for co-ordinating regeneration efforts for the future.

Partnership Working and Added Value

Swansea's Partnership Board has broad public, private and third sector representation and has helped provide essential strategic guidance. The challenge of such partnership working across a single city is to add value to existing relationships and structures and the Regeneration Area has provided a vehicle for close, cross-sectoral working between Welsh Government, the City Council and other key stakeholders.

Recommendations for Future Interventions

Understanding Your Towns: Baseline Data for Monitoring & Management

The Swansea Business Improvement District (BID) 2011 Business Plan provides evidence of progress for specific performance indicators, including attracting over 150,000 visitors to events and a 25% reduction in anti-social behaviour. Wider indicators such as continued slippage in national retail rankings from 68th in 2006 to 86th in 2010 and one of the highest vacancy rates in Wales (24%; 2012) are harder to directly correlate to Regeneration Area interventions.

Integrated Regeneration and Investment Planning

Swansea's Urban Village is an example of how to combine broad regeneration policy objectives with commercial development interest to create a large-scale, mixed-use.

Local Partnership Building and Organisational Development

The BID was the first such initiative in Wales and, as the case study shows, has established an independent identity to foster local commitment from 800 businesses.

Strategic Planning and Development Control

The strategic focus of the Regeneration Area Board appears to have helped create a much stronger commitment to align plans and policies to focus on improving the city centre offer against a background of high levels of existing "out-of-town" retail provision.

Prioritisation and Sustainability of Investment in Physical Infrastructure

The Swansea Urban Village project is an example of an approach that combine its primary focus on the construction of affordable housing with the creation of a commercial income stream to support a long-term, wider development programme.

Regeneration Skills

Swansea City Council has successfully established dedicated project delivery teams drawing together the comprehensive skills necessary to tackle major commercial development projects and engage with the private sector.

Responses to the on-line survey indicated significant accomplishments with respect to BID development, transport improvements, heritage, key buildings and public realm investment and that future skills development challenges were around town centre promotion, events and attracting private investment.

Development and Inward Investment

The *Swansea City Centre Framework* and an ambitious *Economic Regeneration Strategy*, set out wider proposals for economic prosperity, working with Hammerson Plc as a strategic development partner to bring forward major retail expansion of the city in 2008. Whilst major investment remains on-hold in light of the recession, the Regeneration Area status and Welsh Government involvement has enabled continued progress to be made with enabling preparatory works and maintaining Hammerson's commitment to the city.

Managing Transition and Maintaining Momentum

The special status and cross-sector working of the Welsh Government enabled by the Regeneration Area, remains important in maintaining the coordination of stakeholders and confidence of private investors during what will hopefully be a continued period of transition and transformation as the economy emerges from recession.

Swansea's Urban Village: Integrated Mixed-use Development¹³

This case study shows the value of collaboration in bringing together broad regeneration policy objectives with commercial development interest to create a mixed-use scheme of a scale to make a significant local impact.

Registered Social Landlords (RSLs) are playing an increasingly important role in "people and place" regeneration. As Social Housing Grant allocations are under increasing pressure, many RSLs have established very strong development teams and are actively seeking ways to diversify their portfolio, lever grant more effectively, and to generate additional revenue streams to support future housing investment. By aligning their social objectives with commercial development awareness, they bring a different approach to make investment happen in otherwise difficult circumstances and can be very important agents of change; stimulating future commercial confidence.



¹³ The full list of case studies is set out in Appendix 2 of this report.

Swansea Business Improvement District: Adding Value

This case study shows how a Business Improvement Districts (BIDS) launched with City & County input can become very firmly business-led and driven. Indeed, a BID has to be able to establish an independent identity to foster local commitment and demonstrate clear “added value” rather than the business rate levy being viewed simply as an additional tax burden. This, in turn, puts pressure on local authorities to be fully accountable for their town centre services setting a clear baseline for service delivery and avoid the often fragmented nature of operations we still see today.



8.8. Western Valleys

Impact and Value for Money

The dispersed nature of the Western Valleys programme area has been difficult to measure in terms of impact and value for money as the various town centres are in various stages of regeneration investment. The Neath case study shows that the use of local assets converging on a strategic aim is bringing about incremental changes in terms of the town centre offer and strengthening the town as a key shopping and visitor destination such as the Gwyn Hall, Victoria Gardens and other key capital projects.

Partnership Working and Added Value

The geographical spread of the local authorities and contrasting needs across the Western Valleys area is not perceived as having a common goal or vision, with the programme lacking any rationale for town centre regeneration investment or a sense of direction at a strategic level. At a local level there are examples of using local assets and using innovation on single projects but this is due to local delivery and priorities.

Recommendations for Future Interventions

Understanding Your Towns: Baseline data for Monitoring & Management

The town centres need to identify ways of collecting and monitoring basic vitality and viability data, as projects have no evidence base to track future performance from.

Integrated Regeneration and Investment Planning

The Neath case study demonstrates the role of the local authority in promoting a key development site that could unlock a number of town centre objectives in terms of strengthening the comparison retail offer, improving parking and accessibility and creating a stronger retail offer and circuit within the town centre.

Local Partnership Building and Organisational Development

Town centres vary in scale across the Western Valleys with the local authority tending to lead town centre management, with Ammanford developing a town centre group and Neath forming a new town centre consortium that is looking towards a BIDs model.

Strategic Planning and Development Control

Due to the M4 wrapping itself around the western edge of the area and the A465 providing strong east-west links, the area is exposed to competition from larger centres and retail parks. At a district level, the objective has been to retain local custom around basic services, with the larger centres such as Neath being about strengthening the range, choice and variety of attractors within their towns.

Prioritisation and Sustainability of Investment in Physical Infrastructure

The fact that the town centres are situated within ex coalfield areas means the physical condition of the environment has been a priority in terms of public realm, retail frontages and re-use of key note buildings to meet community need, e.g. Maesteg Market Hall. Transport improvements and making town centres accessible has also been a priority, for example through train station improvements in Neath and bus station improvements in Maesteg. Where town centres are in their initial phases of regeneration, design studies have been completed, identifying priorities for physical regeneration which focus on public space, traffic management and linking key amenities.

Development and Inward Investment

As the town centres are mainly at district or community level in retail hierarchy terms, the only real commercial centre is Neath, which has been actively promoting its Water Street development site for an anchor store and complementary uses, along with improved accessibility and parking. This is subject to securing developer funding, Jessica funds and a contribution from the local authority.

Neath Town Centre: Connecting the Assets¹⁴

The approach taken and investment to date is situated within a mid-term phase of investment with some notable schemes becoming part of the town centre offer such as the Gwyn Hall, starting to put the town on the map. A number of key traffic management, public realm and development schemes will strengthen the role and function of the town, whilst ensuring its character as an independent shopping destination.

Key learning points include the role that gardens and parks can play within town centres in terms of activity and community life, event led regeneration that celebrates local history and culture and thirdly how the local authority is realising its assets to meet local priorities through key town centre sites as well as facilitating new ways of working through the town centre consortium.



¹⁴ The full list of case studies is set out in Appendix 2 of this report.

9. Comparator Case Studies

9.1. Introduction

This section summarises analysis and key learning points from the following three comparator case studies undertaken as part of this study:

- The Upper Calder Valley Renaissance Programme, Yorkshire
- The Town Centre Regeneration Fund, Scotland
- Flintshire Town Action Plan Programme

The case studies from Yorkshire and Scotland were selected to capture learning points from programmes of a comparable scale and budget that operated across a similarly large variety of communities. The third case study from Flintshire covers a strategic approach to town centre regeneration in Wales that is taking place outside the Regeneration Areas.

Upper Calder Valley Renaissance: Weaving it all Together

The Upper Calder Valley Renaissance (UCVR) was part of the Yorkshire Forward Renaissance Market Towns (RMT) Programme and was a groundbreaking initiative in a number of ways.

This case study seeks to objectively and accurately capture key learning points from UCVR's pioneering approach to taking a coordinated and area-wide perspective on town regeneration. This was underpinned by a commitment to long-term planning, significant injections of public funding and access to a support programme aimed at building the capacity of local 'town teams'. Though ambitiously proposed as a 25 year approach, the fact that events have conspired to at least temporarily stall its forward momentum, in some senses only adds to the learning points around the design and management of area-based regeneration initiatives and relationship with public funding programmes elsewhere.

Key lessons to be gleaned from this case study relate to: The effectiveness Upper Calder Valley Renaissance (UCVR) of targeting coordinated interventions in five neighbouring towns; the value of combining community capacity building, key enabling projects and long-term investment planning; the extent to which increases in local community capacity resulted from the associated support programme or an existing culture of self-reliance; reflections on timescales necessary to achieve both an independence of institutions able to lead a local renaissance and a 'tipping point' in renewing the economic viability of the respective town centres.



Impact and Value for Money

The Yorkshire case study demonstrates how a long-term and holistic regeneration programme needs to be sub-divided in to discernible milestones if it is to be adaptable to public funding cuts. Whilst investment in local capacity building may have paid dividends, it should be enshrined in financially viable organisations and its impact needs to be objectively measured.

The Scottish case study shows how a competitive bidding process with a short turn-around, favours pre-planned, viable projects rather than long-term or holistic regeneration impacts.

The investment in Flintshire in long-term, strategic planning for its town centres and some local capacity building and involvement, prepares the communities to take advantage of potential investment opportunities in a coordinated way but impacts are dependent on securing other resources and are only likely to be apparent over an extended period.

Partnership Working and Added Value

In Yorkshire, activity in specific towns was also supported by region-wide assistance involving a partnership skills training programme; mentoring support; study tours; interim project management assistance and a series of research projects on shared issues.

The Kirkcaldy and Jedburgh regeneration schemes show existing, local partnerships that were boosted incidentally by the short-term injection of project funds including asset acquisition.

Whilst led by the County Council, the approach in Flintshire is predicated on strategic and local partnership working to make the most of available funds and support but it is too early to tell if available resources are sufficient to maintain the necessary momentum.

Interventions

Understanding Towns: Baseline Data for Monitoring & Management

UCVR activity in Yorkshire was guided by an extensive consultation and master-planning process and high-levels outputs were tracked against this. Despite an emphasis on capacity building, there is little evidence of how progress in developing this was monitored.

Flintshire undertakes annual town centre performance monitoring using a range of indicators to understand and track the outcomes of regeneration activity. This allows comparisons over time and between towns.

Integrated Regeneration and Investment Planning

Evaluation of Scotland's Town Centre Regeneration Fund programme highlighted a number of shortcomings including recognition that town centre regeneration is a complex concept requiring integrated strategies. The project-orientated nature of the funding meant that in contrast, the investments made were mostly piece-meal and disjointed.

Flintshire County Council has supported healthchecks, town partnership formation and masterplanning in all of its eight towns that provides complementary roles and identifies public and private investment opportunities to fund delivery.

Scotland's Town Centre Regeneration Fund: Coherent Strategy or 'Leap of Faith'?¹⁵



The Kirkcaldy and Jedburgh town centre regeneration schemes are examples of initiatives delivered to tight timescales as part of the Scottish Government's £60 million Town Centre Regeneration Fund (TCRF) in 2010. The case studies consider the success of both schemes against wider lessons about the management of national funding for regeneration drawn from the Scottish Government's very informative review of the Town Centre Regeneration Fund.

Both the Kirkcaldy and Jedburgh schemes illustrate the importance of longer-term preparatory work in developing a shared town vision, strategy & action plan to create the readiness to take advantage of funding opportunities and mobilise partners. The financial support provided through TCRF helped deliver discrete physical investments within the context of at least a partial appreciation of wider town centre issues.

Part of the lasting legacies of the schemes in Kirkcaldy and Jedburgh in particular is the way that the schemes indirectly contributed to increasing the capacity of a Business Improvement District and community-based trusts respectively, as well as strengthening their links with the local authorities. There is however, a sense that these legacies and the delivery of ongoing action plans, are to some extent 'leaps of faith' dependent on other opportunities arising, rather than staged strategies that are significantly more viable because of TCRF interventions. A prime example of this is that though a significant town centre asset has been brought in to community ownership in Jedburgh; its use and refurbishment costs are presented as a future activity with its own fund raising challenges.

Local Partnership Building and Organisational Development

Whilst it operated, the Yorkshire Renaissance programme provided the twin enabling forces of available funding and local capacity building but it is not evident whether the present day, community culture of self-reliance, is a legacy of the investment or largely pre-dates it.

The evaluation of the Scottish TCRF indicates that whilst local partnerships are commonplace, there is a need for more clarity on roles and responsibilities and the value added. Civic leaders/project champions are needed to prioritise town centres over a longer period and to initiate confidence in the agreed vision and action plan.

Flintshire Council has supported the development of local town partnerships and the challenge is for these to have an increasingly involved and defined local Strategic Planning and Development Control.

¹⁵ The full list of case studies is set out in Appendix 2 of this report.

Prioritisation and Sustainability of Investment in Physical Infrastructure

One of the incisive conclusions of the Scottish TCRF evaluation was that town centre needs more than physical regeneration investment should be matched by other types of intervention including business development, joint marketing and events promotion.

Regeneration Skills

A pan-Yorkshire Partnerships Skills Programme was part of the wider support provided by the Regional Development Agency and was specifically aimed at developing a breadth of regeneration skills including leadership within communities, mentoring support; study tours; interim project management assistance and a series of research projects on shared issues.

Development and Inward Investment

The County Council provides around £40,000 per town of 'pump-priming' funding to achieve some quick win projects as part of the Flintshire Town Action Plan programme, but the plans focus heavily on attracting inward investment for proposed development.

Managing Transition and Maintaining Momentum

The sudden and unforeseen cessation of funding in Yorkshire impacted on the sustainability of town activity with a stronger dependence on local council and community leadership. In Scotland the TCRF was very much a short-term injection of capital and to some extent 'leaps of faith' dependent on other opportunities arising in future. In Flintshire, the relatively modest levels of start-up funds and the focus on local involvement with strategic council support mean that the challenges of maintaining momentum need to be addressed from the start.

Flintshire Town Action Plan Programme: Strategic Planning and Local Involvement¹⁶

This case study shows how a local authority has used its own resources to facilitate a locally-based approach to town centre regeneration through the development of town centre action plans and partnerships for seven small towns. This authority-wide approach has helped identify key interventions and investments for each town and develop a strategic understanding of the complementary future roles of the neighbouring towns.



The case study focuses specifically on the application of this approach in the small town of Flint to show how this "top-down meets bottom-up" approach works and in particular how it will address the pressing challenge of town centre housing renewal and the health of the High Street. In undertaking this authority-wide approach, the Flintshire County Council acknowledges that there have been important lessons learned about the flexibility of approach needed for different towns balanced with clarity about the role, function, composition and operation of town partnerships. While the small-scale funding has been important in developing action plans and providing 'quick win' outcomes, it is a coming together of different stakeholders that has been a key outcome of this work.

¹⁶ The full list of case studies is set out in Appendix 2 of this report.

10. Key Findings

Town Centre Data Analysis. The emphasis of investment and degree of progress made to date varies significantly across the Regeneration Areas, in line with factors such as their scope and the maturity of the partnerships. Likewise, there is considerable variation in the availability of standardised data to monitor basic vitality and viability indicators, such as footfall and vacancy rates. However, national datasets can be combined with the data available from Regeneration Areas to provide some insights into relative performance in Regeneration Area town centres. Probably the starkest finding from this is the relative under-representation of retail - both convenience and especially comparison - in Regeneration Area town centres. This also implies a stronger role for service businesses than across UK towns as a whole.

Vacancy data from across all Regeneration Area town centres suggests that although larger centres such as Swansea and Newport have above average vacancy rates, the majority of Regeneration Area towns are below the UK average in this respect and the average rate across all Regeneration Area towns has converged with the UK average over the last year. Whilst footfall in larger centres has fallen substantially over the last five years, smaller towns have in general maintained or increased footfall over the period.

Footfall and vacancy data above seems to suggest that small town centres have proved more resilient to the recession than their larger counterparts. Whilst to some extent this will reflect the nature of the use mix in smaller towns and a lack of competition in key areas of retail, it also indicates a relative fragility in terms of national retailer representation on the High Street in city centres. This may however, be influenced by a continuing shift to out of town sites by these major players. The implications of this may be that for smaller towns to compete more effectively, they need to continue with local investment plans and enhance the quality of offer within the existing model, develop their local identity and key selling points. This seems to suggest that some small town centres have proved more resilient to the recession than their larger counterparts, although there are some significant challenges facing these smaller town centres in terms of out of town retail, perception issues and accessibility, amongst other factors.

It is difficult to comment on whether town centre regeneration activities have a direct correlation to trends in town centre data due to the lack of a consistent approach to data gathering and analysis, in addition to the wider national/global conditions that have changed the way that we use town centres in recent times. There is also a need in future monitoring to also recognise that in addition to retail datasets, that a more enriched and holistic set of data needs to be captured in terms of community, cultural, enterprise and well-being type indicators which will help us shaping the future role of our town centres.

On-line Survey Results. The on-line survey results show that town centres have been the main focus for around half of all Regeneration Areas, with main issues relating to external perceptions and the lack of an attractive offer to visitors, along with more familiar concerns about vacancy rates and, maintaining or developing the retail mix. The results have shown that Regeneration Areas s have been good at engagement at a strategic level in terms of delivering town centre programmes and but need to go further with facilitating local engagement and town centre management that is representative and sustainable in terms of resourcing. Whilst there are some good examples of town centre management within the

Regeneration Areas, there is a perception that there is no common ground for people to share experiences and learn from each other.

There is a need to develop more innovative approaches to the delivery of projects in terms of linking projects and activities as well as use of technology in terms of modern day shopping and how town centres connect in terms of our growing on-line culture. Whilst some Regeneration Areas have been outwardly marketing their town centres, there is a need to be more proactive in promoting commercial investment opportunities and presenting an image of “meaning business”.

It is evident that over recent years and building on predecessor regeneration programmes in town centres, that projects have tended to focus on public realm, environmental improvements and property related enhancements. Delivery teams and town centre regeneration practitioners recognise that in addition to the “bricks and mortar” and looking beyond physical investment there is a need to develop the “product” with town centre promotion, events led activity and wider brand development seen as key to raising awareness amongst local residents and visitors. The need for more mixed use economies is identified by respondents and that town centres need to become destinations for a wide mix of activities.

The need for an extended skillset for town centres is therefore acknowledged by practitioners through the on-line survey and through workshops within the respective Regeneration Areas. This involves a mix of technical skills such as land assembly/acquisition through to softer regeneration skills in place management and community leadership. To retain and develop this holistic set of skills is a challenge within the current economic climate in terms of local authority priorities but does present opportunities by sharing responsibilities and developing local governance models.

Reflections on Individual Regeneration Areas. In visiting the seven Regeneration Areas and Newport Unlimited Urban Regeneration Company it is recognised that where partnerships have a clear vision, strategy and action plan, there is a rationale for decision-making and strategic and local partners understand why and where investments are taking place. Whilst such documents help with the organisational delivery of projects they also project a confidence to investors as in the case of the Mill Street development in Aberystwyth and the realisation of the masterplan in Newport City Centre. There are however, examples of where planning decisions such as in Holyhead are creating conflict with town centre visions with a need to plan for “town centres first” rather than accommodating large retail box schemes.

Once Regeneration Areas have set out their plans for investment it is acknowledged that the development, design and implementation of projects takes time and those “younger” Regeneration Area partnerships have quite an intense period of delivery especially when there is a physical regeneration focus. The resultant impact of these will take time to jell together and consolidate activity, expenditure and wider benefits. It is also evident that single focus Regeneration Areas such as Aberystwyth and Swansea are tending to see more focussed activities than dispersed investment across wider geographical Regeneration Areas which helps in building relationships and leveraging in private sector investments.

In more mature Regeneration Areas such as Heads of the Valleys, relationship building is leading to opportunities for integration as well as succession plans such as local

partnerships moving towards Business Improvement District models and piloting ideas in relation to on-line retailing, loyalty cards and use of technology. An integrated approach to regeneration is also seen in Holyhead with the Mon a Menai Programme and the Empty Shops Initiative is tackling physical condition issues through community based action.

Comparator Case Studies. The comparator studies from Yorkshire and Scotland capture learning points from programmes of a comparable scale and budget; whilst the Flintshire example demonstrates what can be achieved by a strategic approach to town centre regeneration in Wales outside of the Regeneration Areas.

Key lessons gleaned include: the importance of longer-term preparatory work in developing a shared town vision, strategy & action plan; the value of integrated delivery combining quick win projects, community capacity building and long-term investment planning; and the effectiveness of coordinating interventions between neighbouring towns in a way that recognises their distinctive roles. Civic leadership needs to nurture over a long period to be able to deliver agreed action plans and physical regeneration should be matched by other types of intervention and skills including enterprise support, marketing and events promotion.

The Scottish Government's review of its own Town Centre Regeneration Fund activity, in particular, highlighted necessary good practice pertinent to this study. The Scottish experience demonstrated that successful delivery of town centre regeneration requires coordination amongst partners and within local authorities with greater clarity on respective roles, responsibilities and the value added. It also indicated the importance a clear strategy to frame project interventions with tightly defined outputs, outcomes and interrelated 'results chains' that can be easily monitored and reviewed.



PART THREE: CONCLUSIONS AND RECOMMENDATIONS

11. Conclusions and Recommendations

11.1. Impact and Value for Money

Prior to making recommendations about future town centre interventions, this section defines the criteria for determining how to optimise local impact and value for money, based on a review of existing town centre projects and programmes within the Regeneration Areas.

Optimising Impact

The “art” of regeneration is about preparing for and facilitating change to improve social, environmental and economic well-being. It is about “people” and “places” and the important interaction between communities. As such the regeneration of town centres is a sophisticated process involving defining and balancing a number of outcomes.

This review of town centre investment across the Regeneration Areas suggests the real 'impact' of activity on town centres is still very much a 'work in progress'. It should be recognised, however, that whilst most Regeneration Areas include reference to improving town centres they were not primarily established as vehicles solely for town centre regeneration but have a much broader social and economic well-being brief, generally across a wide area. Nevertheless, the research shows there is very often insufficient focus on the clarity of town centre visions or ambitions for town centres, with a limited attention or appreciation of the underlying baseline conditions.

Rarely, if ever, is regeneration about the pursuit of a single issue such as lowering the number of empty town centre retail units - though such measures may be important indicators of wider outcomes. Neither can single projects be considered without an appreciation of the wider context and planned/desired outcomes. To be able to optimise the impact of town centre regeneration it is, therefore, essential firstly that there is clarity of vision & desired outcomes for individual towns within the wider context of the regeneration areas. This involves consideration and understanding of:

- The current condition of the town centre - this is based on assessment of baseline indicators of its function and the perceived or quantifiable issues that it faces
- The breadth of outcomes sought - these can be categorised as economic, social or environmental outcomes or more pointedly as commercial, cultural and community concerns
- The targeted beneficiaries of improvements - this could be considered in terms of town centre businesses, the local community, visitors or tourists
- An appreciation of the inter-relationship between a specific town, its neighbours and other competing commercial or cultural centres and activities
- A sense of the potential improvements and desired outcomes for the town centre - the so-called 'town trajectory' which can be broadly defined in terms of towns '*of need*' or '*of opportunity*'.

To define the above criteria and map their inter-relationship in a specific location, a matrix should be created that provides a checklist that can be used in defining and balancing desired outcomes, prior to determining appropriate interventions and monitoring of town centre regeneration.

Achieving Value for Money

Value for money is of course about much more than just controlling costs. It is more about achieving lasting impacts from funding and the influence achievable through working in collaboration. Value for money in this instance is defined as the relative cost to the Welsh Government or wider public purse in optimising the outcomes from town centre regeneration.

There is a need for consistent town centre monitoring data across the Regeneration Areas to help establish the underlying trends and measure overall value for money. This needs to be tracked alongside evidence of the emerging value in using Regeneration Funding to unlock other sources of funding and to leverage public and private investment into regeneration projects (for example through programme bending). It would also be an opportune time to undertake more detailed sustainability appraisals of existing Regeneration Area investment plans in relation to a tighter focus on town centres and local 'vehicles' for maintaining these in the longer-term.

Factors that affect the value for money achieved extend from routine housekeeping to ensuring a lasting legacy from interventions and include:

- The management and administrative overheads associated with running a regeneration programme by Welsh Government and its partners.
- The preparation and delivery of realistic investment plans predicting the financial viability of project investments and the inter-relationships with other aspects, areas, ventures and outcomes sought.
- The effectiveness of levering-in additional private, public or charitable funding for the development and delivery of town centre regeneration.
- The ability for investments to generate a self-financing return that will help sustain regeneration activity and outcomes to deliver lasting impacts.
- The capacity for funding to 'unlock' wider investment to take a whole town's 'trajectory' beyond its 'tipping point' so that 'need' becomes 'opportunity'.

11.2. Partnership Working and Added Value

This section considers criteria for determining the extent to which the strategic, partnership approach employed in the Regeneration Areas can add value to town centre regeneration.

Before considering the 'interventions' or sequence of activities necessary to deliver successful town centre regeneration, it is important to learn lessons about the added value achieved through the collaborative or partnership approach pursued in the existing regeneration areas. In short, what added value is achieved from the Regeneration Area management arrangements (both internal and external to the Welsh Government) that encourage neighbouring towns, local authorities and other key stakeholders to collaborate? These considerations go beyond the necessary brokering and monitoring of project funding, to consider different levels of collaboration and how these can help optimise impact and deliver value for money.

It is important to recognise that there is a differential within partnership working when focusing on a single town or city centre such as Swansea in contrast to a larger spatial area such as Heads of the Valleys. In larger areas, mature partnership working is necessary to provide support and added value through joint spatial strategies, prioritisation of hubs and shared specialist support.

The partnership and project development process needs to be refined to fill the 'gap' between the strategic partnership and delivery teams, so that the appraisal includes consideration of how physical regeneration opportunities lead to "people" based benefits such as skills development, capacity building, business mentoring, etc.

A clear rationale for town centre investment in Regeneration Areas setting out long term, sustainable aims and objectives will strengthen an emerging image of confidence and "meaning business" which has given positive signals to the private sector in some locations.

The list below is proposed to help guide Welsh Government in determining how best it can add value through managing the Regeneration Area programmes in future using a collaborative approach and working across geographical, organisational and sector boundaries. In general these proposed methods of collaboration increase in intensity as they switch from policy to delivery and focus on more in-depth interactions within towns:

- Wider geographic influence beyond Regeneration Area boundaries as necessary including integrated strategic planning to determine the roles and inter-relationships of neighbouring towns.
- Collaboration with key partners as part of Regeneration Area boards and delivery teams to review and agree area-wide regeneration frameworks for targeting and agreeing projects that are holistic and integrated.
- Working across other Government departments and programmes to test and achieve alignment with other Welsh Government strategies/services - 'town centre proofing' and 'bending spend'.
- Working with local authorities and other partners across sectors and departments to apply and develop joined-up thinking in a way that that has local and national learning points, e.g. integrated transport, application of planning policy.
- Working as active partner members within individual towns to support local organisational development, masterplanning, influence and delivery of regeneration
- Working with local authorities and other town-based organisations to facilitate, advise and integrate project development and delivery in terms of piloting ideas, mentoring, knowledge transfer and funding advice.
- Helping provide specialist advice and facilitating the sharing of good practice on town centre regeneration across Wales (both between and beyond Regeneration Areas) through established networks such as the Centre for Regeneration Excellence Wales

10.10 Recommendations for Future Interventions

Against the background of the guidance already provided on impact, value and partnership working from previous experience across the Regeneration Areas, this section provides recommendations about the types of interventions which should be prioritised by the Welsh Government to deliver town centre regeneration.

In doing so, the recommendations seek to build on a track record of delivering physical regeneration and to increase the emphasis on 'softer' regeneration skills and business development necessary to deliver holistic outcomes and sustain regeneration activity beyond this period of 'transition'. Indeed, this approach is consistent with the changing focus of regeneration in Wales from physical enhancement towards more integrated approaches; linking the renewal of places to outcomes for people and communities.

The place-based focus and additional resources available to assist town centre regeneration within the Regeneration Areas, also offer an opportunity to advance Welsh Government policy and practice in relation to other departments and sectors -from health and housing to education and economic development - as well as the improvement of towns across Wales. It is important, for example, to consider these recommendations in relation to Welsh Government's own recent response to the Enterprise and Business Committee report on the Regeneration of Town Centres.

The list of recommended interventions presented below should be considered as a necessary sequence of activities to ensure optimum impact and value for money in delivering town centre regeneration:

Understanding Your Towns: Baseline Data for Monitoring & Management

An essential prerequisite to undertaking regeneration in any town centre, should be to 'understand the place' by collecting key indicators that provide baseline data that can be monitored annually to track progress and influence decision-making. In the way that the Regeneration Areas approach seeks outcomes from local investment to address market failure and deliver social and economic outcomes, the choice of indicators should reflect this.

Welsh Government should encourage greater consistency in town centre monitoring and determination of appropriate performance indicators as a pre-requisite for regeneration funding aimed at town centre improvement. The Centre for Regeneration Excellence Wales is working towards an "enriched benchmarking" tool which will help local authorities and town partnership develop a deeper understanding of the context of their towns and contribute to better visioning and prioritization of regeneration activity.

Importantly this information should be manageable to collect and should be both accessible and understandable to a range of stakeholders in a town and enable comparisons between towns. This understanding of place will involve:

- *Clarifying the town centre vision and desired outcomes:* Applying a matrix covering holistic outcomes, target beneficiaries & inter-relationships prior to determining appropriate interventions and monitoring of town centre regeneration.
- *Setting economic benchmarks:* Collecting key performance indicators about town function, issues and trends including economic performance, business confidence and user perceptions

- *Developing 'enriched' indicators:* Supplementing economic indicators with new 'benchmarks' of social and environmental performance including 'sense of place'; connectivity; cultural and leisure facilities; carbon impact; partnership development
- *Recognising different types of towns:* Development of 'town typologies' incorporating Census data and CADW's characterisation work or our own work on Retail Distinctiveness would enable better strategic planning and comparisons about competition and compatibility of roles and 'trajectories' between different towns.
- *Measuring and managing progress:* Annual monitoring and review of indicators to track progress and perceptions against required regeneration outcomes.

Integrated Regeneration and Investment Planning

Through its regeneration work, Welsh Government is well-placed to coordinate town centre regeneration as a complex process dealing with inter-related issues that are driven by the wider economy and other factors. As such this requires an integrated/ holistic approach to town centre regeneration articulated through clear physical, social and environmental planning that shows an appreciation of the financial inter-relationship between sites, issues and outcomes sought. From the review of existing Regeneration Area practice undertaken here and with reference to comparator studies (in particular the case study on the Scottish Town Centre Investment Fund), key factors to consider in this integrated planning are:

- *Agreeing a clear vision, strategy & action plan:* Successful town centre regeneration requires a clear vision, strategy and action plan to provide a strategic fit for project interventions. Outputs and outcomes need to be clearly defined so that progress can be readily monitored. The agreed strategy should identify the targeted beneficiaries of improvements in terms of town centre businesses, sections of the local community, visitors and tourists (reference Newport 2020 Vision, Swansea City Centre Framework and Colwyn Bay case study).
- *Looking beyond physical investment:* There is a strong case for considering other types of intervention including social issues, capacity building, business development, Unique Selling Point identification, joint marketing and events promotion alongside physical investment (reference Holyhead case study and link to Welsh Government Communities First programme and ongoing review, strategic Business Improvement District partnerships and effective "place-management").
- *Understanding 'town trajectories':* Town centre regeneration strategies and action plans need to show awareness of wider strategic planning within and beyond Regeneration Area boundaries including the inter-relationships of neighbouring towns, respective 'town trajectories' (*need* or *of opportunity*) and the application of related Welsh Government strategies/services (reference inter-relationships between coastal settlements across Mon and Menai and North Wales Regeneration Areas, Caerphilly County Borough town visions).
- *Foreseeing a changing context:* Twenty-first century drivers, such as the transition to a low carbon economy, higher quality urban design aspirations, the knowledge economy and the internet present real challenges and opportunities to town centre regeneration. It is important that plans reflect this ever-changing context and show awareness of related Welsh Government strategies/services (reference Mon a Menai Regeneration Framework and Swansea City Centre Framework).

Local Partnership Building and Organisational Development

An important part of meeting the Welsh Government's objective of optimising the impacts and value for money from town centre regeneration is to facilitate delivery through a holistic

and collaborative approach. Ensuring long-term benefits in this way requires co-ordination with partners and across sectors through engagement, empowerment and clarity of roles and responsibilities. Whereas in the case of the current Regeneration Area programme, resources are only available over limited timescales, it is particularly important that a long-term commitment to regeneration is embedded in the thinking of civic leaders and other local community leaders. The menu of approaches available to the Welsh Government to help embed such partnership building and local organisational development include:

- *Facilitating locally-led planning*: Thorough community consultation and town action planning involving a breadth of business, public and voluntary sector stakeholders is key to underpinning long-term regeneration that meets local needs (reference Flintshire Town Action Planning, Bargoed's Big Idea and Swansea City Centre Framework).
- *Developing cohesive partnerships*: Supporting the development of town partnerships as recommended in the NAFW Report on Town Centres (Recommendations 6,13 and 14) with strong local leadership and defined roles for partners will improve the coordination and long-term management of town regeneration (reference, Bargoed Town Partnership, Merthyr Town Centre Partnership and Colwyn Bay).
- *Creating local delivery bodies*: Helping to develop financially viable local delivery bodies capable of sustaining regeneration outcomes is critical to long-term success and maintaining a return on investment. Such bodies can have a range of forms including Development Trusts or Business Improvement Districts but need to be capable of financial independence through asset management, trading and business contributions linked to regeneration success. There is also a need to maximize the potential role of Registered Social Landlords as development agents with capacity to create integrated mixed-use development.

Strategic Planning and Development Control

The spatial focus on town centres offered by Welsh Government involvement in the Regeneration Areas provides an opportunity to test and develop national policy and local practice in relation to strategic planning and development control:

- *Formalising strategic understanding*: Strategic and spatial planning across and between neighbouring local authorities is necessary to recognise the distinctive roles and future potential of neighbouring towns (reference Flintshire Town Action Planning comparator case study and the Upper Calder Valley Renaissance Programme). The potential revamp of the Wales Spatial Plan as recommended in the City Regions Final Report as a basis for stronger regional planning could play an important role in this regard.
- *Planning for 'town-centres-first'*: As recommended in the NAFW report (recommendations 1, 2, 4, 5 and 12) it is important to test, develop and apply development control policies and retail planning between and within towns in a way that complements regeneration activity and puts 'town-centres-first'. (reference Caerphilly County Council approach to creating capacity for retail development adjacent to Bargoed town centre, work in Neath Town centre and Aberystwyth to create an opportunity to expand the town centre in contrast to the experience in North Wales Coast in respect of Prestatyn or the creation of Holyhead Retail Park.
- *Establishing Action for Change, where* out-of-town development is permitted to take place, it is even more imperative that there is a clear action plan for change to re-

focus the town centre as a complementary retail / food / community / cultural hub or service centre which can add value to a new retail location.

- *Planning for Change* – town centre planning policy tends to focus on maintaining retail frontages regardless of the underlying commercial potential or need. A more flexible and appropriate response is needed to facilitate a wider range of town centre activities that encourage and support greater diversity, facilitate destination functions and complement commercial activity, whilst avoiding loss of critical mass through fragmented residential conversion. Core town centre boundaries need to be more realistically drawn and more regularly assessed in context of the town vision and strategic action plan.

Regeneration Skills

In tackling current issues and opportunities in town centres, there is a call from town centre regeneration delivery bodies and practitioners for a mix of technical, cross professional skills and softer skills that enable holistic town centre regeneration.

- *Sharing expertise in physical regeneration:* Existing skills and good practice can be shared within and between Regeneration Areas to develop an integrated approach to public space, buildings and other town centre generators; conservation, heritage and design advice.
- *Developing the skills or capacity for acquisition/land assembly:* Complex projects require available expertise in land negotiation, Compulsory Purchase Order advice and other property related expertise. This should help enable the smarter targeting of investment through proactive and complementary approaches involving developing town centre portfolios, investment fairs and tailored account management for specific town centre businesses.
- *Promoting importance of 'softer' skills:* Product development, place management, marketing and promotion, business mentoring/training, enterprise support and community leadership skills in town centre regeneration are equally important skills, which can provide substantial leverage of investment. These need to be developed and shared within and between Regeneration Areas.
- *Developing regeneration skills:* There is scope to run short courses in softer, holistic regeneration skills such as town centre product development, place management, mentoring and training, etc.
- *Creating a property/land development advisory panel:* Specific property related opportunities can be facilitated by preliminary/scoping advice leading to property-led strategies for local authorities and other organisations. This could be enabled by a strategic fund for facilitating and accelerating targeted development opportunities.
- Finally, there is a need to develop and maintain core skills in *process/management and monitoring* areas of strategic regeneration work, specifically visioning, business case development, monitoring and evaluation work:

Creative Retail Growth & Support

This review has indicated that the current economic climate and changing shopping patterns are fundamentally impacting on the role and function of our town centres, resulting in an increase in empty retail units. A creative approach is needed to find viable new and transitional uses for these empty premises and this should include:

- The flexible application of business rates: activity in the Regeneration Areas should be used to test and develop approaches identified in the Welsh Government

Business Rates Review Task and Finish group to manage business rates in a way that reflects local circumstances and helps stimulate local economic development, such as empty property rates, rate relief measures and to develop differing approaches to larger out of town retailers to city or town centre businesses.

- *Creating new and transitional uses for empty shops:* Guidance and specialist support should be made available to facilitate “pop up” and “meanwhile” uses. These can support the transition of town centres as well as providing a pathway for new enterprises, piloting products and providing more diverse activities that support community services, arts, culture, as well as retail.
- *Forming a pan-Wales approach to enabling 'meanwhile' use:* Through an umbrella organisation or vehicle (possibly underwritten by Welsh Government), standard approaches could be rolled-out around lease/occupancy licence agreements and insurance provision in order to minimise individual set-up costs and administration. Care should, however, be taken to ensure the process is part of a genuine evolution of place rather than simply a means to reduce operating costs of otherwise commercial enterprises.

Development and Inward Investment

Commercial retail investment is becoming increasingly polarised towards major and often sub-regional town centres, with the middle ground/traditional district centres potentially having an uncertain future. In devising future vision and strategy for town centres, partners must be realistic about the commercial development and investment and this could involve:

- *Re-designing the focus of town centres:* Future proposals could involve taking a more radical approach including even shrinking the core retail area and enhancing other social, community and even residential development to enhance the physical context and focus of the town.
- *Stimulating new local/independent businesses:* Innovative approaches to creating new business growth may need to encourage an alternative and more distinctive local character and retail offer/experience. Expectations for rental growth and assumptions about future property values will need to be addressed and public intervention to facilitate more appropriate redevelopment may be necessary using CPO powers to properly determine market value against “aspirations” in order to address market failure in smaller town centres.

Managing Transition and Maintaining Momentum

Effective town centre regeneration demands a long term and comprehensive approach based on a clear sense of place and future direction. Targeted Government funding can help mobilise initiatives and unlock investment potential, but is not the only source of funding available. The Welsh Government can also assist town centres through the promotion of good practice initiatives and the deployment of professional skills and resources to establish future vision and direction which may help capture other funding sources and/or prepare a town to take advantage of any future Government funding which may become available.

There is clear evidence with the Regeneration Area process that delays in determining the vision and action plan created difficulties in committing funds and resources to the most effective long term regeneration projects and this situation should be avoided at all costs in the future. Having said that, there is also now evidence that Regeneration Areas are perhaps beginning to mature into effective delivery partnerships and Government support to maintain their strategic prioritisation and co-ordinating remit to respond to local needs should be

encouraged. This will allow existing Regeneration Areas to adjust to changing priorities and more effectively establish a stronger town centre vision for the future.

It is recommended that the Welsh Government can assist with a smooth transition in the Regeneration Areas by:

- *Investing in need and effectiveness:* By offering early, clear guidance on future priorities and interventions including the requirements and levels for future Welsh Government support. Future funding decisions should be based on need, balanced with a clear demonstration of impact, added value and long-term sustainability through identification of alternative support mechanisms.
- *Supporting transition:* Providing guidance and revenue support as necessary to help prepare at least three-year succession plans for Regeneration Areas and towns within them that show how they will respond to changing circumstances, including the development of long-term regeneration partnerships with a great proportion of local support.
- *Maintaining 'special' status:* Continuing to recognise the special status of the Regeneration Areas in a way that helps test and develop cross-sector approaches within Government and maintains a suitably high profile to help lever-in other funds.



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An Evaluation of Current Practice in Relation to Seaside Town Regeneration

A report by Wavehill Ltd and Planning Solutions Consulting Ltd for the Welsh Government

October 2012

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Report prepared by:	Oliver Allies, Senior Consultant oliver.allies@wavehill.com David Howells, Planning Solutions Consulting
Quality assurance:	Richard Brooks, Director
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Executive Summary

In June 2012 Wavehill Ltd in partnership with Planning Solutions Consulting, were appointed by the Regeneration Division of the Welsh Government to evaluate the local impact of regeneration activities in seaside towns within the designated Regeneration Areas (RA). The report has focused on providing clear, evidence-based findings to:

- Determine the effectiveness of the impact of the investment in seaside towns;
- Consider the extent to which the strategic, partnership approach employed in the Regeneration Areas adds value to seaside town regeneration
- Suggest priorities that could be embedded within future regeneration policy for seaside towns.

The coast of Wales has played a unique role in the history, heritage and culture of the country. Today, 60% of the population live and work in the coastal zone and 70% of the Welsh coastline is recognised for its environmental importance and beauty. Whilst the RA programme does not have a specific focus on seaside towns, five of the seven RAs were considered to encompass conurbations that could be considered seaside towns, although there are differences in the scale and scope of seaside town's regeneration activities within these areas¹.

The approach in the **North Wales Coast** RA, centred on Rhyl and Colwyn Bay, has focused on an integrated programme of economic, environmental and social interventions to bring about sustainable change and having to cope with "post-mass tourism legacy. The **Mon a Menai** programme includes a strong coastal emphasis, but the programme is more a response to the general economic downturn and the transition to a low carbon economy. **Swansea** is slightly different again, where the focus is on addressing key social and economic issues and capitalising on opportunities that exist with regional 'capital' (and subsequent city-region) status. The RA investment in **Aberystwyth** is focused on maximising its key settlement status as well as addressing local deprivation issues, specifically unemployment and economic inactivity and poor housing quality. **Barry** still retains the characteristics of a seaside town, particularly on the island, however the programme remit has been broad ranging with a distinct focus on the community alongside a desire to target the three key areas of Barry Island, the waterfront and the town centre.

The review has involved consultation with key stakeholders in the five RAs, a review of existing monitoring data, socio-economic analysis of the comparative performance of the identified seaside towns against thirteen other seaside towns identified in Wales and primary research with businesses, residents and visitors in the seaside towns within the RAs.

The review has been undertaken whilst the programme is still in operation; indeed, three out of the five RAs have only been 'operational' since 2010/11. This has made an analysis of impact arising from the investment difficult with the outcomes of RA investment only beginning to be realised.

The socio-economic analysis provides little evidence of the RA areas out-performing the comparator seaside towns² although Aberystwyth has, against some measures, out-performed comparator areas. More generally, the seaside towns within North Wales have suffered over the 2008-2010 period to a greater extent than elsewhere and this is particularly the case in Holyhead.

¹ The "seaside towns" within RAs were identified as: Aberystwyth, Barry, Beaumaris, Benllech, Colwyn Bay, Holyhead, Prestatyn, Rhosneigr, Rhyl, Swansea

² Comparator seaside towns were identified from: Seaside Towns in Wales: A benchmarking study, CRESR Sheffield Hallam University November 2009

Investment has funded a relatively large portfolio of projects, consisting of multiple components, across the spectrum of regeneration activity. It is important to recognise that in some instances the investment has catalysed regeneration by becoming the 'dealmaker' enabling projects to be brought forward more quickly. Whilst quantifiable impact is difficult to identify, there are a number of good examples of successful resort regeneration activities. Visitors and businesses were quick to identify public realm, promenade and town centre improvements and their role in uplifting the quality of experience within the towns.

In terms of outputs and results arising from RA investment, the crude value for money assessment suggests poor value for money. However, the breadth of potential outputs and outcomes that RA investment can target, undermines the accuracy of value for money assessments based on cost per output alone. The estimated rate of private sector funding "induced" in the RAs is also considered to be a poor return and whilst it can be partly attributed to a weak economy and market failure, is also likely to have been influenced by the lack of an intervention rate for the programme. It is also apparent from our review of monitoring information that the capture of outputs and outcomes is not comprehensive which severely impacts upon the accuracy of (and serves to under-value) a value for money assessment.

A more positive picture however is evident from the primary research undertaken with visitors with almost 60% of visitors to the seaside towns stating the towns had improved in recent years. However, feedback from businesses was mixed, but this should be considered in the context of the current economic climate and the poor seasonal weather in 2012.

Our research found that investment has galvanised commitment and momentum at a strategic level and also amongst delivery partners and communities. Certainly at the outset of designation, there appeared to be more of a "can do" attitude in a number of RAs, with clearer ideas of direction and many pipeline projects emerging. RA Board and Delivery partnerships have (rightly) been given the lead to refine and develop their action and implementation plans for delivery. The level of flexibility brings with it innovation and there are some very effective practices being adopted.

There have been a number of 'process' deficiencies, which make the task of assessing performance and impact difficult, particularly the lack of consistent baseline data and the lack of systems and procedures for collecting and managing output data.

At a local level, there are a number of examples of good practice at a process and project level. The review of best practice suggests that securing successful coastal regeneration requires a number of key building blocks / themes, including:

- local leadership and ownership;
- alignment of private and public sector policies and agendas;
- clarity on outcomes – where partners have divergent views of the big picture, the prospects of success are severely compromised;
- maximising the impact of private and public sector investment in specific places;
- engagement and involvement of local people;
- an understanding that physical development on its own will not revive communities;
- a long timescale – regeneration does not happen overnight.

Whilst investment has been a significant step in the right direction, long term problems remain in coastal communities. A clear priority is the need to grow the economy in a sustainable way; the focus needs to be on economic growth in coastal communities (jobs and employment), which leads to prosperity and provides the means to tackle poverty and disadvantage. Regeneration addresses market failure in economic terms and builds confidence in communities to invest in their economy. The untapped opportunities of individual locations need to be realised; their distinctive assets, their past heritage, new cultures and proximity to other regional assets. Long term transformational change requires a balance between need and opportunity, with a smaller number of strategic priorities.

Where market failure in seaside towns exists, the towns need to diversify away from their traditional narrow “bucket and spade tourism” focus, reflecting the needs of visitors whilst at the same time not losing sight of the USP of being located along the coast.

There is general consensus emerging through our research that there needs to be greater strategic alignment across WG departments (education, business and skills) to better address the needs of coastal communities. On some indicators, Welsh seaside towns emerge as more disadvantaged than Wales as a whole, including employment rate; working-age benefit claimant rate; seasonal unemployment; earnings and housing lacking key amenities. However, one key feature is the diversity between *individual* seaside towns. Many seaside towns are performing well; whereas others (notably Rhyl and Holyhead) continue to experience severe levels of multiple deprivation. The challenges and problems facing seaside towns are complex and will take time to address but the scale of need and opportunity does provide a case for a strategic response to coastal regeneration in Wales.

The report makes a number of recommendations.

1. Consider broadening the terminology (and therefore focus) from “seaside town” to “coastal town/coastal community”.
2. Review and up-date the *Seaside Towns in Wales: A benchmarking study* and develop a robust coastal baseline to provide an information base on coastal towns and communities in Wales.
3. Develop a more sophisticated management information system to capture outputs, outcomes and impacts arising from investment.
4. Consider increasing the Coastal Communities Fund ‘pot’ for Wales to drive forward economic development and job creation in coastal areas.
5. Provide targeted resources to back major investment plans that have a ‘catalytic’ effect to stimulate the growth in areas of greatest need.
6. Provide greater incentives to encourage funding leverage particularly from the private sector.
7. Improve the sharing of lessons between public agencies, stakeholders and other partners exploring ways to support coastal communities, particularly cross-RA programme learning and wider dissemination.
8. Put in place formal mechanisms in the WG to increase strategic co-ordination, alignment and partnership working
9. Encourage and support investment into developing a dynamic visitor offer associated with “place-making” based on local assets and distinctiveness.
10. The strategic partnerships established as part of RA designation need to continue to provide strategic direction, influence and drive delivery. A greater sense of ownership over project activity may provide the impetus required.

1. Introduction

1.1. Background

In June 2012, Wavehill Ltd in partnership with Planning Solutions Consulting, were appointed by the Regeneration Division in the Welsh Government to evaluate the local impact of regeneration activities in seaside towns within the designated Regeneration Areas (RA). The overarching aim is to contribute to the evidence base for the regeneration policy review currently being undertaken by the Welsh Government.

It is hoped that in reviewing regeneration activities and identifying lessons learnt in the practice of seaside town regeneration that this will assist in the development of a future approach and methodology for regeneration investment. An important driver for the study is the Welsh Labour manifesto commitment to address some of the unique issues and challenges facing seaside towns in Wales. As such, the report focuses on the local impact of Welsh Government investment in seaside towns within appropriate RAs and not an overall evaluation of the RAs programme.

1.2. The brief

The objectives of the evaluation study, as set out within the brief are to:

- Evaluate the local impact, and value for money of seaside town projects and programmes within the seven Regeneration Areas.
- Consider the extent to which the strategic, partnership approach employed in the Regeneration Areas adds value to seaside town regeneration.
- Make recommendations about the types of interventions which should be prioritised by the Welsh Government to deliver the optimum impact and value for money in terms of seaside town regeneration, based on the experience of delivery in the Regeneration Areas. Interventions to be considered should include the Heritage and Tourism offer.
- Compare, as far as possible in the time available, delivery in Regeneration Areas against similar interventions across the UK and beyond.

In terms of addressing these objectives, the brief identifies two Work Packages, which have shaped the structure of the final report.

Work Package 1: Determine how individual investments have impacted on the overall viability of seaside towns

The aim of this work package is to demonstrate (or otherwise) the effectiveness of the impact of the investment on Seaside Towns in Wales, including a suggested way forward of building this process into any future programmes including the range of indicators to be used.

Work package 2: To comment on the effectiveness of the current regeneration delivery model and future scheme/policy development

The focus of this work package is to assess the effectiveness and efficiency of the delivery model adopted; review how the various schemes and interventions could be further developed to support regeneration in this area and to provide a clear set of recommendations to assist the Welsh Government with its future approaches to regeneration in the planning of any future intervention.

1.3. Defining seaside towns

The definition of what constitutes a seaside town is widely recognised as lacking clarity and has been an initial priority in the evaluation process to determine the focus for our baseline review and primary research activities.

There is no archetypal seaside or coastal town. A distinction can be made between ‘seaside towns’, which refer to resorts / former resorts and ‘coastal towns’, which casts a net to include a diversity of urban areas by the sea. Our priority is to focus the evaluation on Welsh Government regeneration spend on seaside towns, which have a strong association with the rise of seaside tourism. Because of their role in the history of tourism, and in most cases the continuing significance of this sector, they tend to share a number of features that distinguish them from other places along the coast or inland. This includes:

- a specialist tourist infrastructure (promenades, piers, parks, beach etc.);
- holiday accommodation (hotels, boarding houses, holiday parks and caravan sites); and
- a distinctive resort character that is often reflected in the built environment.

Moreover, while some resorts have fared better than others, they have all to a greater or lesser extent faced challenges arising from the changing structure of the UK holiday trade, most notably the decline of long domestic holidays and the growth of short breaks and cheaper overseas holidays.

A study to investigate the seaside tourism industry in England and Wales undertaken by Sheffield Hallam University³ categorised seaside towns by scale and scope of visitor activity. The categories included:

- Principal seaside towns: generally towns with a population of over 10,000, where the town’s economy was heavily dependent on visitor activity (both day and staying visitors);
- Smaller seaside towns: towns with a population of less than 10,000 (with a minimum population of 1,500) with similar characteristics to principal towns;
- Other seaside towns: towns which have resort characteristics but tourism is not the primary economic driver of the town.

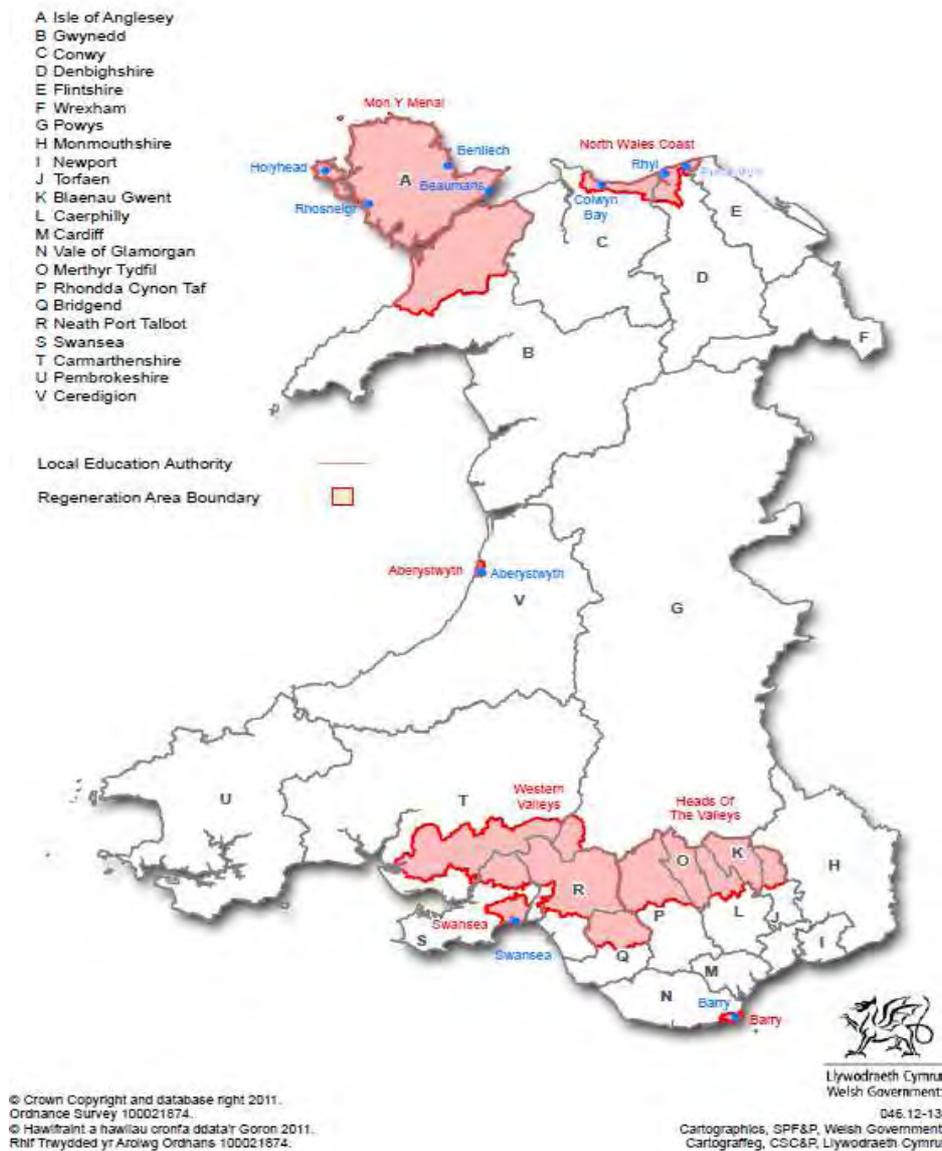
We have adapted this to categorise seaside towns within the five Regeneration Areas (RAs). The table below sets out the main seaside towns that have been the focus of our evaluation work.

³ The Seaside Tourism in England and Wales, Centre for Regional Economic and Social Research, Sheffield Hallam June 2010

Table: 1 Seaside towns and categorisation

Regeneration Area	Barry 2010 2013	Mon a Menai 2008 2013	North Wales Coast 2009 2014	Aberystwyth 2010 2013	Swansea 2010 2013
Resort Categorisation					
Principal seaside resort	Barry		Rhyl Prestatyn Colwyn Bay		
Smaller seaside town		Benllech Rhosneigr Beaumaris			
Other seaside region		Holyhead		Aberystwyth	
City Region					Swansea

Figure 1: Map of Seaside Towns



1.4. Our approach

Our approach has included a combination of qualitative and quantitative research techniques, including:

- An analysis of available monitoring data;
- Formal discussions with Board representatives in the RAs;
- Meetings with Regeneration Teams in the five RAs at a management and operational level;
- Selective discussions with key stakeholders and delivery partners.

Additional primary research was undertaken in each of the seaside towns (apart from Holyhead which was considered by stakeholders to be less of a seaside town than Beaumaris, Benllech and Rhosneigr) with the RAs. Primary research was undertaken through a street survey with residents and tourists along with door-to-door surveys of local businesses.

1.5. Structure of report

The remainder of the report is structured as follows:

Section 2 outlines the policy and programme context with regards to seaside towns;

Section 3 addresses Work Package 1 in terms of assessing the impact of RA investment on the overall viability of seaside towns, including:

- A review of the RA programmes and priorities;
- An assessment of the impact of RA investment; and
- A review of how interventions compare against similar interventions across the UK.

Section 4 addresses Work Package 2 and reviews the effectiveness of delivery and future priorities, including:

- A commentary on delivery models and management systems; and
- Consideration of future priorities.

The final section suggests a set of recommendations to assist the Welsh Government with its future approaches to regeneration in the planning of any future interventions.

2. Welsh Seaside Towns: Policy and Programme Context

2.1. Background

It is important to place the evaluation work in the context of the wider policy and programme framework which is in place to support coastal regeneration.

Regeneration is about improving the lives of the people and places they live in and covers a range of activities, from large-scale physical renewal projects to neighbourhood interventions that improve quality of life.

The majority of the Regeneration Division budget of c.£60m per year is invested in the seven Regeneration Areas, with the remainder committed to other programmes. Welsh Government policy and interventions in the seven Regeneration Areas has the overall aim to invest in people and places in order to achieve long-lasting economic, environmental and social change. The objective is to maximise the impact of limited regeneration resources to make a real difference to communities in the priority areas. A raft of regeneration programmes and projects are being delivered by local agencies and partners to meet this aim. The “Framework for Regeneration Areas” (October 2010) emphasises the belief that co-ordinated effort and investment in defined geographic areas can inspire the prosperity of that area as well as the quality of life of the people living and working there.

In relation to the Welsh Government’s commitment to address seaside towns, the Labour Manifesto has a strong commitment to “revive our seaside towns by investing in the infrastructure, renewal and regeneration of communities.” Five of the Regeneration Areas in Wales have a strong coastal theme. Although there are differences in scale and scope, there are a series of common issues facing seaside towns in the Regeneration Areas:

- changes in tourism trends;
- the seasonality of the seaside economy;
- frequent high levels of deprivation;
- a range of housing issues;
- declining town centres;
- issues concerning coastal erosion;
- physical isolation;
- high levels of in-migration of older people and out-migration of young people placing pressures on social and community services.

This is particularly the case of the North Wales Coast RA (and to a lesser extent Mon a Menai and Barry), which suffers from structural problems linked to the demise since the 1970s of traditional seaside resort tourism. Swansea is slightly different, where the focus is on addressing key social issues and capitalising on opportunities that exist within the ‘regional’ capital.

2.2. Seaside towns: Coastal Tourism Strategy and key priorities

There is a wide recognition that tourism is often a catalyst for wider economic and local regeneration activity. In terms of seaside resort regeneration, the Welsh Government's Coastal Tourism Strategy was launched in December 2008 and sets out a common strategy for the development of coastal tourism, which realises and builds on the economic potential of Wales, whilst respecting its environmental quality and recognising the importance of achieving community benefits. The strategy sets out the following vision for coastal tourism:

'An integrated year round coastal tourism industry, based on an outstanding natural environment and a quality tourism product that exceeds visitor expectations, whilst bringing economic, social, cultural and environmental benefits to coastal communities'.

The strategy continues to provide a strategic focus towards delivery of a wide range of project opportunities in order to realise the full potential of the Welsh coastline. An up-dated Action Plan is being prepared. As the strategy doesn't have a dedicated budget, delivery is dependent upon co-operation and partnership working. Under the direction of VisitWales, a Steering Group of key stakeholders and partners continues to meet to coordinate the implementation of the strategy at a national level.

In addition to the RAs, the Welsh Government has a number of strategies and policies that aim to support the regeneration of coastal communities and seaside towns in Wales, including Communities First, Rural Development Programme etc. The Welsh Government also uses investment across a range of departments to stimulate regeneration.

Key investment priorities have included:

- Wales Coastal Path
- Strengthen resorts/resort regeneration
- Encourage improvements in accommodation stock
- Strengthen community involvement (encourage engagement in the management of the rural coast)

2.3. Coastal Communities Fund

The Government has made a commitment to support coastal communities to address some of the unique challenges they face and enable them to realise their potential. In March 2012 the Government launched a new programme called the Coastal Communities Fund (CCF) to support economic development projects in coastal areas across the UK. This is being delivered on behalf of the government by the Big Lottery Fund, operating as the Big Fund a non-Lottery arm.

The Coastal Communities Fund is designed to support the economic development of coastal communities by promoting sustainable economic growth and jobs, so that people are better able to respond to the changing economic needs and opportunities of their area.

Round 1 of CCF has recently been announced and demand for the programme in Wales is shown in the table below:

Table 2: Demand for Coastal Communities Fund

Budget	Number of Eols	Value of Eols	Projects Invited to Stage 2	Value of Stage 2 Applications	Percentage Invited to Stage 2	Ratio of Stage 2 Value to Budget
£1,150,000	107	£16,753,409	13	£2,612,726	12%	2.3

The successful applicants in Wales for this year are:

- **Bay Leisure Limited** – £140,000 to a Swansea based scheme with the aim of creating a Watersports Centre of Excellence to provide a range of activities using the natural assets of the beach and waterfront.
- **Coastal Hawks Project CIC** – based in Conwy, this one year project aims to transform the former disused butterfly jungle on the Conwy Estuary into a falconry centre (£103,000).
- **Menter Y Felin Uchaf Cyf** – £204,000 for a two year project on the Llyn Peninsula to create a permanent resource for the training of local people in specialist skills for developing new green and cultural tourist enterprises and volunteering opportunities.
- **Penarth Arts and Crafts Ltd.** – £199,000 for a two year project will support a Marketing and Activities Office for Penarth Pavilion.
- **Rhyl City Strategy Community Interest Company** - £300,000 to a project concerned with increasing micro-businesses, self-employment and entrepreneurship in the area.

Discussions with partners seem to confirm support to the focus and general thrust of the fund objectives, although there are some concerns about the fund management by the Big Lottery. Despite a commitment for a further 2 years, the biggest issue for Wales is the scale and scope of the funding pot, which is seen as being too small to really make an impact and support local economic development in coastal communities that will have a real impact.

2.4. EU Programmes

The European Regional Development Fund (ERDF) has often been used as a resource to match Welsh Government investment in RAs, particularly within the Convergence area. Other EU funding streams appear to have rarely been used as part of RA. The next programme of Structural Funds is due to begin in January 2014 with West Wales and the Valleys likely to qualify for the successor to Convergence with anticipated funding levels similar to those within the current programme. There is a desire within the next programme for closer integration of the various funding strands (Dr. Grahame Guildford has recently been commissioned by the Welsh Government to undertake a review of EU funds to identify how best to integrate them).

Priorities for the forthcoming programme, across the funding streams are:

- Education, skills and lifelong learning
- Research and innovation
- Helping people into work
- Sustainable transport and network infrastructure
- SME Competitiveness
- Sustainable (renewable) energy and energy efficiency
- Access to and exploitation of the digital economy

The proposals for ERDF Programmes in Wales suggest a focus around:

- SME Competitiveness
- Research and Innovation
- Energy and Energy Efficiency
- Infrastructure (including ICT infrastructure)

However it is important to note that at least 80% of ERDF monies in the current Competitiveness areas will need to be invested in the first three areas, whereas the proportion falls to at least 50% of ERDF monies in the current Convergence areas.

2.5. Summary

The Welsh Government's commitment to address seaside towns is evidenced within the Labour Manifesto which looks to "revive...seaside towns by investing in the infrastructure, renewal and regeneration of communities". There is a recognition that coastal towns and cities around the coast of Wales vary greatly in size and character from the capital city to small resorts and fishing ports. It is accepted that the future prosperity of resort communities will depend not only on tourism activity but also on strengthening the local economy to provide additional employment and income opportunities for residents. Having said that, in contrast to other British destinations, trips to the seaside/coast dominate the Welsh holiday market with 34% of all visits and 33% of all spend compared to 18% and 17% in England and 12% and 11% in Scotland.

The Coastal Communities Fund is a dedicated programme to support the economic development of coastal communities but there is concern that the scale of funding available is not sufficient to address the social and economic challenges facing coastal communities in Wales. Whilst European funds provide significant additional resource this is spatially targeted to the Convergence region and increasingly targeting economic development.

3. The five RAs: Programmes and Priorities

3.1. Introduction

As set out in the previous section, five out of the seven RAs have a strong coastal theme, although there are differences in the scale and scope of seaside town's regeneration activities.

The North Wales Coast, centred on the towns of Rhyl and Colwyn Bay, consist primarily of coastal towns. The main driver for economic growth during the middle and latter half of the twentieth century was seaside tourism, but with the decline in mass tourism, the area is having to cope with a "post-mass tourism" legacy. The approach has focused on an integrated programme of economic, environmental and social interventions to bring about sustainable change.

The Mon a Menai programme includes a strong coastal emphasis, including developing a strong tourism offer maximising the area's natural assets including the coast. However, the programme has not been designed to address the traditional structural problems associated with changing tourism patterns, but were more a response to the general economic downturn.

Swansea is slightly different again, where the focus is on addressing key social and economic issues and capitalising on opportunities that exist with regional 'capital' status. Indeed, the main seaside 'hub' in the Mumbles is not within the RA boundary.

Aberystwyth is an important administrative, service and cultural centre, which has a key service function for the wider sub region and Central Wales. Although it remains the leading tourist resort in Cardigan Bay, the RA investment is focused on maximising this key settlement status as well as addressing local deprivation issues, specifically unemployment and economic inactivity and poor housing quality.

Barry still retains the characteristics of a seaside town, particularly on the Island, however the programme remit has been broad ranging with a distinct focus on the community (supporting the development of Barry as an attractive place to live) alongside a desire to target the three key areas of Barry Island (and its role as a destination for activity-based day trips), the waterfront and the town centre.

The remainder of this section includes a description of the five RAs, based on a review of strategies and Action Plans and meetings with Regeneration Managers and staff and discussions with key stakeholders. In the following tables, we summarise the programme priorities of each of the five RAs, together with a commentary on key interventions and delivery mechanisms.

RA	Aberystwyth
Year Approved	2010
Operational Timescale	Initially 2010-2013 (subsequently extended to 2015)
RA Budget (spend to date)	£10.3m (£1.65m as of March 31st 2012)
<p>Aberystwyth secured RA status in 2010 and in announcing its designation Aberystwyth was described as “offering significant opportunity to realise the benefits of a more strategic approach to regeneration in the Central Wales region” This perception, which could be considered a rationale for Aberystwyth’s designation as an RA was largely echoed amongst the representatives of the RA steering group. Others went a little further in their justification for its designation, describing Aberystwyth in 2010 as being at something of a tipping point with the potential for significant decline, but also with clear opportunity; however the town needed public investment to mitigate the risk of the former and to maximise the latter.</p> <p>Prior to its designation as an RA, Aberystwyth’s focus for regeneration was informed by a Masterplan developed for the town in 2007. The action plan developed in response to Aberystwyth’s designation as an RA is said to have replaced the Masterplan, however in doing so, it has drawn upon some elements that were initially identified.</p> <p>The action plan for Aberystwyth is driven by five objectives:</p> <ul style="list-style-type: none"> • Creative a thriving and attractive town centre • Improving the quality of homes for local people • Enhancing transport in and around the town • Re-invigorating the seafront and promenade • Boosting the economy and employment <p>Whilst several of these objectives are broad-ranging, each is underpinned by a clear and succinct suite of actions that tie the objectives down to specific areas (of geography and/or society) which provides clear direction for RA investment and activity.</p> <p>Aberystwyth’s RA is governed by a Board and a Delivery Team with representatives from the public (including the local authority, Wesh Government and the University) and the private sector (represented by the local Chamber and by Menter Aberystwyth).</p> <p>The RA is promoted through various means including local fliers and posters, encouraging the public to contact the Welsh Government representatives for further information and with the scope to allow for interested parties to apply to the programme.</p> <p>Progress in terms of RA expenditure in Aberystwyth has been limited, largely due to one of the flagship schemes (a new retail development and multi-storey car park at Mill Street), which had £3.5m of gap funding allocated to meet the anticipated viability gap, receiving a tender application that ultimately required no public sector investment. Concerns regarding the ability to spend the allocated RA budget have led to a reprofiling of spend and extension of the RA until 2015.</p> <p>A number of key schemes are now progressing in the town, including the transport interchange and a series of property improvement schemes. Specifically in relation to the coastal area, the focus has been on property improvement with many of the facades of properties on the seafront having been improved and public realm improvements, particularly along the promenade. In addition the promenade has been subject to a wider public consultation and a design study with the bandstand, street improvements and the paddling pool seen as the priorities.</p> <p>In terms of a future focus, there is recognition that the town is not making the most of the coastal path and also of the need to enhance the visitor offer, in terms of accommodation and the standard of service within accommodation. There is also a desire for a greater sense of place, a sense of distinction for the town which could be related to the cultural and environmental assets that exist.</p>	

RA	Mon a Menai
Year Approved	2008
Operational Timescale	Initially 2008-2014
RA Budget (spend to date)	£33m

The original 2008 Mon a Menai Action Framework was a pre-emptive response to the planned closure and decommissioning of Wylfa Power Station and to set out a programme to strengthen the economic competitiveness in the wider sub-region. As well as economic change, the Action Plan was also designed to address a number of other challenges and issues facing the area including out migration of young people; pockets of severe deprivation; low levels of GVA per head of population etc. The revised Mon a Menai Strategic Framework (2011-2014) focuses on the development of a Low Carbon Economy for the region. The original 2008 Strategy was designed and driven by the Welsh Government, with little consultation with Gwynedd Council. This has been addressed in the revised strategy, which is felt as being a more inclusive framework for action.

The aim is to “take facilitative and pre-emptive action to ensure that appropriate infrastructure and skills enablers are in place for the development of low carbon opportunities”.

The Action Plan is driven by the following objectives:

- Low Carbon Energy: to increase low carbon energy generation
- Innovation, knowledge and skills: to establish the skills and technology needed to drive a low carbon economy
- Infrastructure, mobility and transport projects: to develop a sustainable infrastructure and more sustainable means of movement
- Natural environment, heritage and coastal assets: to ensure that the natural environment and local heritage are managed and developed as assets to encourage low carbon economic development
- Sustainable communities and well-being: to continue to support the development of assets that serve the community in a more sustainable way

The broad themes provide a basis for actions and project development and flexibility in terms of project design. The new strategy and action plan is also more reflective of the wider Welsh Government strategy.

A number of successful schemes have been progressed with RA funding. From 2010 – 2012, the Mon a Menai Regeneration Area has provided funding to over 60 projects. The programme makes a clear distinction between coastal regeneration activities (which is a strong focus of the programme) and actions to support resort development (specifically bucket & spade product development), which isn’t a programme priority. In relation to the coastal area, RA investment has focused on infrastructure and physical improvements, e.g.

- Holyhead Cruise Berth capital investment
- Victoria Dock berthing facilities
- Gallows Point, Beaumaris
- Town centre improvements

Investment has also been focused on activities to make better use of the Anglesey coastline, including the Mon Menai Coast Action Plan which includes a range of projects to improve and upgrade work to enhance the tourism offer.

A Strategic Board representing all major stakeholders and project sponsors has been in place since 2008, although the Board doesn’t meet on a regular basis and is not involved at an operational level.

RA	North Wales Coast
Year Approved	2009-2010
Operational Timescale	2009-2012
RA Budget (spend to date)	£20m

The North Wales Coast (NWC) was designated as a RA in October 2008 in recognition of the deep rooted issues of multiple deprivation experienced along the coastal strip. £20m was allocated to support the initial delivery of an Action Plan, which was designed to “transform the RA into a thriving and vibrant coastal area that is welcoming and friendly within a locally sustained economy.” The funding has also been used to draw down European Convergence money. Six themes have been identified for action:

- Space for Living
- Health and well-being
- Education and skills
- Community cohesion
- Environment and Transport
- Diverse and Sustainable economy

Six Theme Leads and sub groups were established to design the thematic actions and provide rationale for the projects. The Action Plan is being implemented by the North Wales Coast RA Partnership Board, which is responsible for setting the direction of travel and monitoring progress. In reality, most of the strategic and operational work is undertaken by the two Area Boards. Concerns have been expressed regarding the effectiveness of the NWC Regeneration Board. In practice, the RA is made of two distinct programmes:

- Bay Life+: which sets out a clear regeneration programme for Colwyn Bay to move it away from the traditional seaside town into a modern, vibrant centre for commerce, tourism, employment and leisure.
- Rhyl Going Forward: a strategy and delivery plan to meet the vision of “recreating Rhyl as a place where people choose to live and stay and rediscover Rhyl as a place to visit.”

A review of the programme indicates some distinctive cultural difference in the design, development and implementation of programme.

Bay Life+

- Masterplan focused
- Political and officer buy-in
- Interventions focused on town centre, waterfront and Parc Eirias
- Some local impact, particularly in terms of improving the image and perceptions of Colwyn Bay

Rhyl Going Forward

- Complex socio-economic environment
- Strong focus on West Rhyl Regeneration Area, specifically housing renewal
- Limited impact to date (due to housing ‘strategy’)
- Strategic focus improving: ‘work in progress’

The priority has been to spend the allocation; but the RA has funded a range of successful coastal regeneration activities, including Parc Eirias, Apollo Cinema and various physical improvement schemes. The priority focus has been on the West Rhyl Housing project, which has secured over 65% of RA funds. Despite RA investment and concerns regarding the future of the programme, the main issue has been the lack of private sector investment, particularly in Rhyl, which could be in part be due to the current economic climate. There has also been little strategic alignment with other Welsh Government programmes.

RA	Swansea
Year Approved	2009
Operational Timescale	2009-2013
RA Budget (spend to date)	£18m (£11.881m as of March 2012)

Swansea was designated as an RA in January 2009 with a rationale based on its recognition as an area of considerable need (particularly in relation to social issues and as evidenced through the Welsh Indices of Multiple Deprivation) but that also offers abundant opportunities. Swansea's strategic status as the recognised regional capital, prior to RA designation has led to the designation of Swansea Bay as a city region. A strategy was developed for the Swansea Regeneration Area in 2010 that draws on previous evidence with a vision for the RA that "by 2016 Swansea will be a proud, vibrant, ambitious city at the heart of the wider region, where people want to live, work and visit, as confident about its future as it is proud of its past".

The strategic approach to regeneration in Swansea is guided by several elements; Swansea's Economic Regeneration Strategy 2020 (itself a joint venture between CCS and Welsh Government) is seen as providing the broad footprint for the RA. Further strategic direction is offered through the City Centre Strategic Framework. Whilst the governance and strategic approach is a little confused, there is nevertheless clear ambition and focus (as evidenced within these and other documentation) on the future success of the city.

The work undertaken in Swansea falls under five themes:

- Cohesive Communities
- Providing Opportunities for all
- Regional Capital
- Sustainable Wealth Creation
- Housing and the Environment

Swansea's RA is governed by a Board and Delivery Group with the Board's role as providing an oversight on spend, and progress with project delivery. A Delivery Group operates below the Board with representatives from the council and the third sector. The lead in terms of delivery of RA projects is dependent on location and "ownership" with the City Centre Strategic Framework Management Team leading on the majority of regeneration works within the city.

There is little/no promotion of RA as a funding pot to apply into with the emphasis on strategic partners bringing forward key schemes that align with the various strategies and frameworks in place.

Swansea RA has made good progress in delivering key projects associated with the RA. From a seaside town/coastal communities perspective there has been a clear emphasis on continuing the promotion of Swansea as a "Waterfront City" with an emphasis on improving the visitor's experience of Swansea waterfront and the linkages between the city and the coastal area.

Furthermore, the Watersports Centre of Excellence in Swansea Bay has been particularly successful in leveraging in various funding (in addition to RA) and will provide a facility for beach and water sports within the city. Additional investment to facilitate an improved visitor experience particularly at the gateway to the city has taken place at Swansea train station. Furthermore, there are plans to establish a creative quarter within the city linked to the creation of a creative industries hub as part of the urban village and through the redevelopment of Glynn Vivian Art Gallery and potential enhancements to the Swansea Museum. Further cultural enhancements are planned for the city associated with the refurbishment and opening of Hafod Copperworks to the public.

There are also plans to utilise the existing knowledge base and waterside location to develop significant water-based research and development alongside a Hydro Hub within Swansea Bay.

RA	Barry
Year Approved	2010
Operational Timescale	2010-2013
RA Budget (spend to date)	£9.8m (£5.489m as of March 2012)

Barry was announced as the last of the Regeneration Areas in March 2010 linked to the regeneration potential of housing initiatives and the opportunities to arise from the investment at St. Athan (however the Defence Training Centre project was subsequently axed, albeit that the location now benefits from being within the Aviation Enterprise Zone). At a local level, there is a perception that an element of lobbying associated with a desire amongst local groups for the reinvestment of some of the monies generated through the sale of land surrounding Barry Docks may have contributed to RA designation. The RA partnership has broad representation from the public, private and voluntary sectors. The meetings are well-represented.

As part of the action plan for Barry the RA Partnership agreed to focus on two objectives:

- Supporting the development of Barry as an attractive place to live
- Supporting the development of Barry Island as a destination primarily for activity-based day trips

To see the realisation of these objectives a number of key themes (with associated priorities) were identified:

- Physical regeneration and tourism (town centre, waterfront, Barry Island)
- Health and well-being (housing, lifestyle and behaviours, leisure facilities)
- Housing and environment (housing, energy efficiency and micro generation)
- Overarching theme of skills and employment

As the last RA, Barry has had the shortest period of time to incur the allocated spending. The drive for expenditure was particularly acute in the first year of the RA and led to a number of visible, community based projects already in the pipeline securing investment. However, in doing so, concerns were raised that the council was displacing their own monies with RA funds to fund council projects.

To attract viable applications from external partners, an element of RA resources has been promoted within Barry to encourage project applications from within the community. Additional resources have been provided to support project development amongst the community to help bring forth an innovative approach and a greater diversity of interested parties. The nature of investments are said to be limited however due to a perceived lack of third sector capacity and collaboration, this furthers very localised projects at the expense of more strategic collaborative investments (although capacity is seen as building).

The more strategic projects within Barry have been seen as too long term and too expensive for RA investment, specifically (in relation to tourism in terms of a link between the island and the town/waterfront and works on Barry Island itself). However there is an increased recognition amongst the board that RA resources should be used to facilitate the realisation of some of these schemes and is a reflection of the emergence of a more strategic perspective and approach amongst the RA Board.

In terms of visitor related investment, RA monies have been used to create a playground at Porthkerry Country Park along with improvements to two leisure centres. Public realm investment has also taken place in Thompson Street which links the Docks area with Barry town centre, there has also been investment in an open-air gymnasium on Barry Island.

4. The Impact of RA Investment

4.1. Baseline

The rather fluid nature of RA designation has offered little consistency in the scale and comprehensiveness of baseline data. In Aberystwyth and Swansea there is evidence of socio-economic analysis although much of this is associated with Masterplans (in relation to the former) and regeneration strategies (in relation to the latter) which pre-date RA designation. In Barry a discrete socio-economic analysis was undertaken specifically in relation to the RA.

In addition to the secondary data, Aberystwyth RA also subsequently commissioned extensive primary research, again as a precursor to RA designation with a clear mandate at the time (from the Welsh Assembly Government) for establishing a baseline from which the future impact of any regeneration activities in the town could be measured.⁴

In Mon Menai, the towns attributed with seaside status make up a small portion of the entire RA area and therefore any baseline evidence is not necessarily co-terminus with the boundaries of these towns.

With this context in mind, our focus has been on retrospectively establishing a baseline for the designated seaside towns within the RAs.

Whilst the designation and commencement of each RA has been staggered, a consistent year (2008) to capture baseline evidence has been chosen. This pre-dates RA designation in all areas and also signifies a time when the economic downturn was just starting to take hold.

Since 2008 the UK economy has subsequently fallen into a double-dip recession and considering the performance of each town in isolation may present a series of rather bleak trends. A series of comparator seaside towns have therefore been identified and those, along with wider geographical areas, have been used to benchmark trends to provide a more considered assessment of relative performance given the context within which we find ourselves.

The designation of comparator seaside towns has drawn heavily upon research undertaken in 2009⁵ the designation of seaside towns within this research was informed by research undertaken into principal seaside towns (in excess of 10,000 people) with four “areas” (some towns have been amalgamated where urban sprawl has made the areas continuous)

- Barry
- Llandudno/Colwyn Bay/Conwy
- Porthcawl
- Rhyl/Prestatyn

⁴ Perceptions in Aberystwyth: Baseline Study, Wavehill (2009)

⁵ Seaside towns in Wales: A benchmarking study, Centre for Regional Economic and Social Research (2009)

With a further group of smaller towns (each with a population below 10,000) drawn from a range of research, providing a further 13 destinations

- Aberaeron
- Benllech
- New Quay
- Rhosneigr
- Twywyn
- Abersoch
- Criccieth
- Porthmadog
- Saundersfoot
- Barmouth
- Fishguard
- Pwllheli
- Tenby

Most notably, neither Swansea, nor Aberystwyth were recognised within this analysis as seaside destinations and are perhaps best described as coastal communities.

The disaggregation of the amalgamated towns alongside the additional inclusion of Aberystwyth and Swansea within the analysis provides a collection of 22 separate locations.

4.2. Performance Analysis⁶

Table 3 below provides a series of ranking figures for the RA towns in relation to population, demographic profile and employment in each town. The rankings reflect scale of need and are therefore inversely related to performance, for example it is estimated that Aberystwyth's population grew by 2.9% between 2008 and 2010, it was the fastest growth of all towns included in the analysis and therefore ranked 22nd out of 22 in terms of need. This compares to Rhosneigr where the population fell by 2.7% which was the fourth fastest rate of population loss of all towns (including the comparator towns).

The table highlights population losses, primarily along the NWC and within Mon Menai. Employment losses have been particularly severe along the NWC and within Aberystwyth.

Table 3: Population and Employment Trends

Area	Population change 08 10		Working age pop n change 08 10		Employment change 08 10	
	Change %	Rank	Change %	Rank	Change %	Rank
Wales	0.5		-0.3		-3.1	
Comparators ⁷	-1.2		-0.8		-0.1	
Swansea	1.5	21	0.5	21	1.5	17
Barry	1.2	20	0.3	20	0.0	16
Aberystwyth	2.9	22	0.6	22	-12.7	4
Holyhead	-0.9	11	0.5	19	-10.6	7
Beaumaris	-0.7	13	0.1	9	6.9	18
Benllech	-0.9	10	-1.4	3	8.1	19
Rhosneigr	-2.7	4	-0.3	5	-2.9	12
Colwyn Bay	-0.9	9	-0.2	15	-6.2	10
Rhyl	-0.8	12	-0.4	14	-8.9	9
Prestatyn	-0.1	17	-0.5	12	-14.3	3

⁶ Further detail on performance is contained within a technical annex to this report

⁷ The average change in the 12 comparator seaside towns

Table 4 below presents data on benefit claimants with consideration of the change in the proportion of the working age claiming an out of work benefit (ESA, JSA, IB etc.) and the change in the proportion claiming jobseekers allowance (JSA) between 2008 -2011. The rates are based on yearly averages and again highlight a particularly poor performance in seaside towns based in NWC and Mon Menai when considering all types of out of work benefits (with the vast majority of towns increasing at a greater rate than the Welsh average). Aberystwyth stood out as the only RA town to reduce the rate of out of work claimants.

In relation to JSA claimants the seaside towns have tended to perform better than what was typically experienced throughout Wales and within the comparator seaside towns with only Holyhead surpassing the rate of increase experienced elsewhere. This is particularly concerning given that of all the seaside towns, Holyhead had the highest claimant count rate for 2011 (10.8% of the working age population).

Table 4: Out of Work/Benefit Claimants

Area	All out of work benefits			JSA Claimants		
	% Change 2008-11	Ranking Change	Ranking 2011	% Change in rate 2008-11	Ranking Change	Ranking 2011
Wales	4.3			62.8		
Comparators	1.6			71.5		
Swansea	4.2	12	3	58.2	10	6
Barry	7.0	7	5	61.4	9	3
Aberystwyth	-4.0	16	21	31.0	17	19
Holyhead	9.8	4	2	76.2	7	1
Beaumaris	2.0	13	16	30.9	18	9
Benllech	7.9	6	18	26.9	19	14
Rhosneigr	6.7	8	10	58.1	11	4
Colwyn Bay	10.3	3	6	41.1	13	5
Rhyl	5.5	10	1	39.2	16	2
Prestatyn	8.5	5	8	61.8	8	12

Table 5 below ranks the average rank for all lower super output areas within the RA seaside towns based on the 2008 and 2010 Welsh Indices of Multiple Deprivation. The scale of movement in rankings has been relatively small, however again Holyhead's poor average and worsening rank is notable. However a number of caveats need to be taken into account when reviewing the rankings set out within table 5 below; the index cannot be used to:

- monitor change over time
- say how much more deprived one area is than another
- aggregate to different geographies by taking an average of the ranks of the LSOAs which make up that geography.

Table 5: Average WIMD Score – 2008 & 2010

Area	2008	2010	Change	Ranking (avg rank change)	Town Ranking 2010
Comparators	986	1003	17		
Swansea	809	814	6	12	5
Barry	930	900	-30	4	9
Aberystwyth	1138	1212	75	18	20
Holyhead	351	332	-19	7	1
Beaumaris	1137	1032	-105	2	15
Benllech	932	907	-25	5	10
Rhosneigr	702	792	90	19	4
Colwyn Bay	1050	1066	16	14	17
Rhyl	567	561	-6	9	3
Prestatyn	938	924	-14	8	11

Figure 2 below illustrates the seasonal trends in JSA claimants amongst each of the towns or groups of towns by RA. The chart provides an indication of both the scale of unemployment as an issue and the extent to which seasonality influences the rate. The designated seaside towns in Mon Menai show a high rate of unemployment combined with a high level of seasonal fluctuation. Whilst Barry also exhibits a high unemployment rate, the seasonal fluctuations are far less marked.

Swansea and Aberystwyth show little in the way of fluctuation and reinforces the research that suggests they are not seaside towns and/or that their economies are far less reliant upon seasonal influences.

Figure 2: Seasonal Fluctuations in Claimant Count (JSA) rates (as a % of Working Age Population)⁸

⁸ North Wales Coast and Mon Menai data relates to the seaside towns within those SRAs only and not to the entire designated area of the SRA

In contrast to other GB destinations, trips to the seaside/coast dominate the Welsh holiday market with 34% of all visits and 33% of all spend compared to 18% and 17% in England and 12% and 11% in Scotland. It has been difficult to source consistent baseline data for the RA seaside towns and comparators to analyse changes in tourism patterns and trends for 2008-2011.

Table 6 below explores the rate of employment within two broad industrial sectors within each location; accommodation and food services and arts, entertainment, recreation and other services. Interestingly, Holyhead is least reliant upon these sectors as a source of employment (with the employment in relation to the port likely to sit within the transport sector this is perhaps unsurprising), whilst Swansea and Barry have rates very similar to the Welsh average. Other towns within Mon Menai are particularly reliant upon these sectors with significant fluctuations in performance over the 2008-2010 period from one town to the next.

Table 6: Employees: Accommodation & food services and arts, entertainment, recreation & other services. % of all sectors

Area	2008	2010	% change 2008 2010	Ranking: Sector Performance	Ranking Sector Reliance
Wales	11.2	11.6	3.6		
Comparators	31.8	30.8	-3.1		
Swansea	10.8	10.9	1.1	12	19
Barry	10.3	11.7	13.4	14	18
Aberystwyth	15.1	19.3	27.9	15	13
Holyhead	11.9	8.3	-30.0	2	22
Beaumaris	30.7	35.8	16.6	21	7
Benllech	32.3	34.1	5.6	18	8
Rhosneigr	26.7	47.1	76.4	22	3
Colwyn Bay	10.7	12.3	14.7	17	17
Rhyl	12.8	12.7	-0.9	9	16
Prestatyn	28.4	27.9	-1.9	10	11

Table 7 indicates the total number of trips to a selection of seaside towns within the RA areas. The visits show a net decrease of 3.1% which compares to the Wales total increasing by 4.8%.

Table 7: Trips to coastal towns

Staying visits by UK residents	Average 08 10	Average 09 11	
Source: UKTS	thousands	thousands	% change
Wales	8,669	9,085	4.8
Aberystwyth	231	237	2.6
Swansea	151	185	22.5
Bangor	147	127	-13.6
Caernarfon	125	122	-2.4
Beaumaris	27	27	0.0
Colwyn Bay	48	20	-58.3
Barry	23	11	-52.2
Coastal Towns Net	752	729	-3.1

Using data collected by Visit Wales, we have analysed visits to tourist attractions within 2 miles of the coast located within the respective RAs, which are outlined in the table below.

Table 8: Visitor Numbers at (selective) Tourist Attractions within 2 miles of the coast

	2008	2009	2010	% change 2008 2010
NWC				
Sky Tower	17,103	20,585	18,937	+11%
Nova	81,529	n/a	94,635	+16%
Mon a Menai				
Penrhyn Castle	187,271	186,875	227,443	+21%
Caernarfon Castle	174,964	193,683	192,543	+10%
Plas Newydd	74,589	73,455	96,721	+30%
Beaumaris Castle	67,329	78,231	80,645	+20%
Green Wood Forest Park		135,646	117,446	-14%
Aberystwyth				
Aberystwyth Cliff Railway		131,767	129,026	-2%
Ceredigion Museum	35,010	34,688	31,814	-9%
Swansea				
Nat. Waterfront Museum	228,760	257,888	262,799	+15%
The Leisure Centre	451,138	592,276	649,053	+44%
Plantasia		88,970	73,647	-17%

Within the RA areas, the average percentage increase in visitor numbers to attractions within two miles of the coast between 2008 and 2010 is just over 10%. This compares with an increase of just under 8% for visitor numbers to larger tourist attractions in the whole of Wales (those attracting over 10,000 visitors per annum) within two miles of the coast. However, without extensive primary research of the visitors to these sites it is not possible to attribute any of the increase to RA related investment.

4.3. Quantitative Impact

The role of RA investment has been about achieving additional economic, social and environmental outcomes that would not otherwise have occurred, whilst also representing good value for money in terms of public investment. Investment in physical regeneration interventions are long-term investments. This is a result of the structural economic and social challenges that are being addressed and the nature of many of the interventions which usually involve legal and planning processes and additional timing for construction of large scale projects. It is this long-term nature of physical regeneration projects, exacerbated by local socio-economic conditions, that increases the risk profile and viability for the private sector.

It is recognised that no consistent analytical framework was put in place to measure performance in each of the RAs, which makes the task of assessing impact difficult. In addition, by its very definition, regeneration covers a broad range of programme activities designed to reverse economic, social and physical decay in the RAs. As such, although there are some common themes and priorities, each of the regeneration areas has designed different programmes and activities to meet local needs leading to the delivery of different outputs and outcomes. It has also been difficult to disaggregate those activities primarily designed to address seaside town regeneration needs and priorities. Finally, the RAs have different timeframes, so whereas Mon a Menai, a mature partnership programme, has delivered a number of tangible outputs, Aberystwyth is only just entering 'delivery-mode'.

Clearly it is important to capture the range and diversity of regeneration benefits, recognising that a number of different markets and beneficiaries may be affected. In terms of the process, all projects submitted by the Regeneration Areas are expected to produce outputs as evidence of return on investment. Discussions with the Regeneration Division indicate that the process and practice of capturing performance output data was not embedded into the regeneration programme at the programme inception; hence data is only available from 2009 and there are some issues regarding reliability and consistency.

One of the questions for the evaluation is to assess what sort of projects and outputs have been funded through the RA investment. In terms of our analysis, we have collected performance output data for the three year period 2009 – 2012. What is clear is that the £55,263,000 Welsh Government investment during this period into the five Regeneration Areas has funded many (and varied) regeneration projects and delivered a 'bundle' of outputs for beneficiaries and areas.

Capital investment in physical regeneration is the essential component for the RA, where capital funding has been provided for interventions to address barriers to regional market success. There are a range of different types of physical regeneration that have (and continue to be) funded in the five RAs, e.g.

- Bringing land and buildings back into economic / social use: e.g. the external refurbishment of the Pumphouse in Barry.
- Improving public realm and facilities: the majority of RAs are involved in a programme of public realm improvements in the main focused on seafront improvements and programmes to improve the quality, appearance and economic performance of town centres.
- Boosting the image of the region: as well as providing excellent sporting facilities, Parc Eirias is changing the image and profile of Colwyn Bay as well as positioning the town as a central attraction on the North Wales coast.
- Land remediation, and
- Cross-cutting regeneration initiatives: e.g. the West Rhyl Regeneration programme is to reduce the over-supply of one-bedroom, multi-occupancy housing in West Rhyl and create a better mix of housing in terms of type and tenure, which will also deliver a number of social outcomes.

Initially, the Welsh Government introduced a range of 'dashboard indicators' to assist measure performance against five key performance targets, including:

A260 Land developed – employment: the number of gross hectares of brown / greenfield land developed for employment use.

A270 Land developed – other: the number of gross hectares of brown / greenfield land developed for other uses.

R220 Investment induced – capital: the gross amount of direct tangible or intangible investment from the private sector, commercial, charitable and not for profit organisations.

R320 Premises created or refurbished: the number of metres of building space created or refurbished for business and/or education use.

R240 Jobs accommodated: the number of jobs accommodated within sites and premises referred to in R320.

These performance indicators were seen as being a proxy to assess key regeneration outputs associated with the physical priorities of the RA programmes. The table below summarises the outputs delivered by the five RAs with regards to these performance targets.

Table 9: Dashboard Performance Indicators: 2009/10 – 2011/12

	Aberystwyth	Barry	Mon a Menai	NWC	Swansea	TOTAL
RA Investment	£1,714,000	£5,509,000	£17,893,000	£18,125,000	£12,022,000	£55,263,000
A260:Land developed – employment			7ha	91ha	0.9ha	98.9ha
A270:Land developed – other		2ha	3ha	.74ha	3.78ha	9.52ha
R220:Investment induced	£363,000	£1,105,000	£12,137,000	£7,217,000	£2,095,000	£22,917,000
R240:Jobs accommodated		15	290	127	392	824
R320:Premises created or refurbished	13m2	1,387m2	12,328m2	16,300m2	747m2	30,775m2

The Dashboard Performance Indicators are no longer used to collect key regeneration outputs associated with RA investment, which perhaps demonstrates the increased diversity of RA activities and/or the lack of management performance information provided by the RAs.

It should also be recognised that the capital investment has generated other social, economic and environmental benefits, which are much more difficult to measure, such as improving public sentiment, building investor confidence and tackling deprivation.

Overall, the results indicate that a range of positive outputs have been secured from RA investment. Physical regeneration projects take a long time to complete and to realise their full potential, so it can be assumed that the Gross Value Added from physical regeneration projects could be increased. However, the medium to long term impact will need to take into account the current economic climate. It is likely that the full impact from intervention is expected to manifest in the medium to long term, particularly from those where the activity will generate outputs but has not yet commenced (e.g. investment into the West Rhyl Housing Renewal Area).

An important consideration is value for money, i.e. the ratio of benefits to cost. In order to judge the value for money of the regeneration investment and with little management information available for analysis, we have used evaluation work undertaken by the National Audit Office during 2010⁹ as a benchmark of projects with similar activities and objectives. Based on the net RA expenditure of project outputs, we get the following value for money (VfM) ratios for the whole population of physical regeneration projects in the five RAs for 2009-2012:

⁹ NAO: Regenerating the English Regions – RDAs' support to physical regeneration projects.

Table 10: VfM Assessment of RA spend

	Total RA Expenditure	Total gross outcomes	VfM measure	NAO Benchmark VfM measurement
Hectares (A260 / A270)	£55,263,000	108.42ha	£509,712 per hectare	
Employment (R170)	£55,263,000	50	£1,105,260 per job	£30,000 per (estimated cost of gross jobs created)
Induced investment	£55,263,000	£22,917,000	£0.41 'induced' private sector investment from every £1 RA investment	£1.51 'induced' private sector investment from every £1 RDA investment

Regeneration initiatives should seek to be cost effective and represent good VfM. On the surface, RA investment has provided poor value for money, particularly with regards to job creation. This is perhaps misleading. The RAs are not an explicit job creation programme; many of the schemes are about improving the environment and stimulating the workings of land, property and housing. Indeed, if the Jobs Accommodated indicator (R240) is included, then an additional 824 jobs have been accommodated, which would ultimately lead to a significant increase in jobs created. The “private sector induced” benchmark is perhaps of more concern and demonstrates the problem of securing private sector investment in physical regeneration activities. Given the outlook for public finances, the over-reliance on public sector investment is no longer viable and future efforts must focus on how areas can provide confidence and facilitate greater private sector involvement and investment.

4.4. Primary Research

Additional primary research was undertaken in each of the seaside towns (apart from Holyhead which was considered by stakeholders to be less of a seaside town than Beaumaris, Benllech and Rhosneigr) with the RAs. Primary research was undertaken through a street survey with residents and tourists along with door-to-door surveys of local businesses. The geographical focus for the street surveys and business consultations in each town was in known visitor “hot spots” (typically along the promenade or near to a waterfront). This in part, reflected the brief but also reflected recognition of separate primary research being undertaken as part of the review of regeneration in town centres and the need to avoid duplicating the research undertaken in each town.

4.4.1. Residents and Visitors

With the available resource our team budgeted for consulting with 60 businesses and 60 visitors/residents within each RA. A total of 324 residents and visitors were consulted as part of the research with almost 70% (225/324) visitors and the remainder residents. The researchers were most likely to encounter visitors in Mon Menai (91% of those surveyed), Barry (86% of those surveyed) and Aberystwyth (73% of those surveyed) and were least likely to encounter visitors in Swansea (31% of those surveyed).

Resident responses

Almost 55% of residents who responded to the survey had resided within the town for over 20 years; this may reflect the timing of the survey, which in the majority of occasions took place during the week, during the day. 74% of respondents were aware of major physical regeneration works within their town.

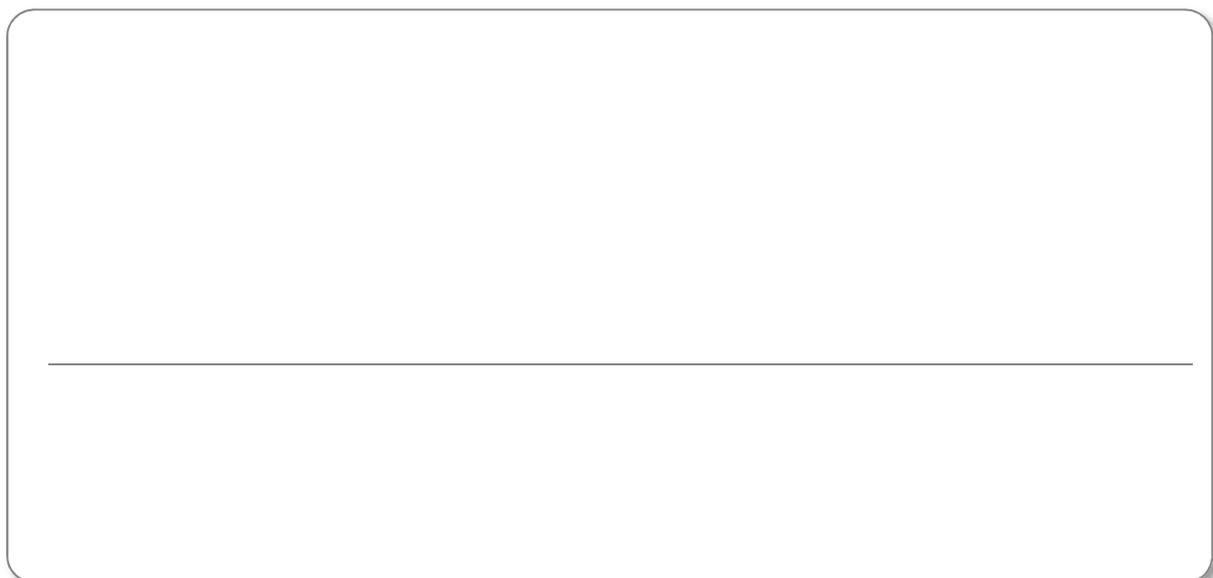
The proportion of resident respondents in each of the towns (apart from Swansea) was insufficient in number for any meaningful resident perception analysis on a town-by-town basis to be undertaken. In Swansea, where a greater proportion of respondents were residents, they tended to be very positive about the town as a place to study (97% describing the town as good or very good) and a place to live (84% of respondents describing it as good or very good) they were also positive regarding Swansea as a town for visitor/leisure purposes (67.5% describing as good or very good). Swansea residents were most negative about the town when asked to rate it as a place to shop (45% of respondents describing it as good or very good).

When Swansea residents were asked what should be celebrated or promoted almost half (47%) specifically referred to the beaches, the Mumbles or the Gower. When asked about improvements the most popular response related to improving the cleanliness of the town and the waterfront, several residents also cited the need for improvements in the Mumbles and the need to improve the retail offering in Swansea.

Visitor Responses

In terms of the visitors surveyed, 41% were visiting from within Wales, 56% were from England or Scotland with the remainder, visitors from overseas. Over 81% of the respondents were visiting the various towns for leisure reasons and 40% were day visitors. Figure 3 below provides a breakdown on where the surveyed were planning to stay. The chart highlights a broadly consistent trend aside from Barry where respondents were almost entirely made up of day visitors whereas there were no day visitors to Rhyl.

Figure 3: Visitor Profile



The majority of visitors (79%) had visited the towns on a previous occasion. Aberystwyth was the town where visitors were most likely to have visited on a previous occasion (93%) whilst 41% of visitors to Rhosneigr were visiting the town for the first time.

Those who considered themselves to be repeat visitors were asked whether they felt the town had improved or worsened over recent years. The trend across the towns was positive with almost 60% of respondents stating the town had improved, whilst 11.2% felt that the town had worsened. The most positive feedback from visitors came in Barry where 86% of visitors felt that the town had improved over recent years.

In terms of priorities for improvements, the most commonly cited elements in towns where a significant number of visitors were consultant are outlined within table 11 below.

Table 11: Most Commonly cited elements for improvements

Town	Perceived Priorities for Investment
Colwyn Bay	Promenade and pier improvements, better quality more variety of shops
Rhyl	Reopen the fun fair/redevelop that location
Beaumaris	More facilities on the pier/seafront (café for example), improved car park signage
Barry	More public toilets and benches on the seafront, outdoors swimming/paddling area, reopen the fun fair
Aberystwyth	More/improved parking, Painting/improve the buildings along the promenade

4.4.2. Businesses

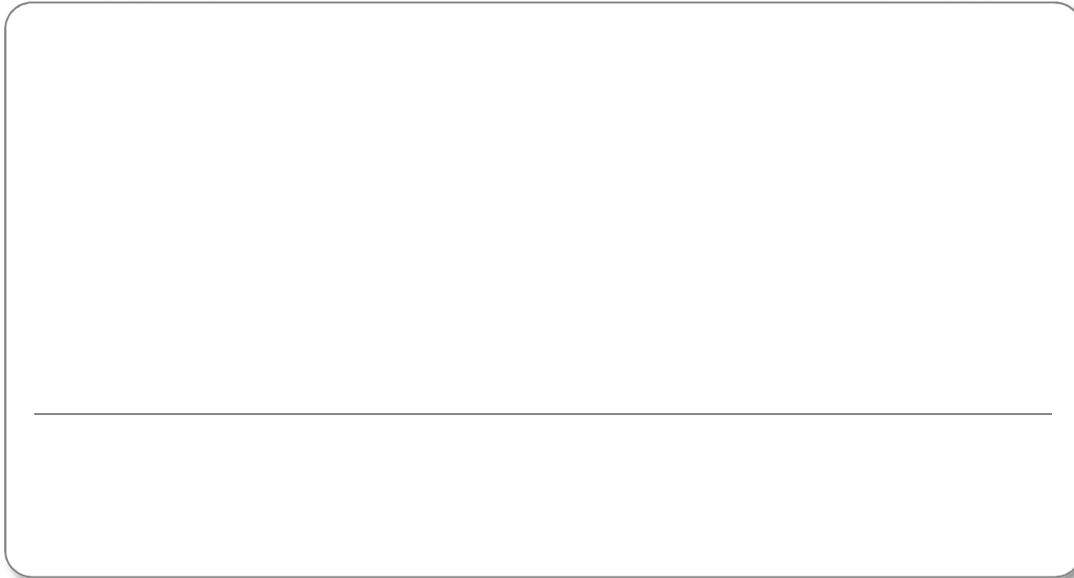
A total of 323 businesses were surveyed, again with the aim of capturing opinions from at least 60 businesses within each RA. The total number of businesses surveyed by town is set out in the table below.

Table 12: Total number of businesses surveyed by town

	N	%
Aberystwyth	66	20.4
Barry	60	18.6
Swansea	64	19.8
Beaumaris	21	6.5
Benllech	10	3.1
Holyhead	24	7.4
Rhosneigr	8	2.5
Rhyl	35	10.8
Colwyn Bay	35	10.8
Total	323	100

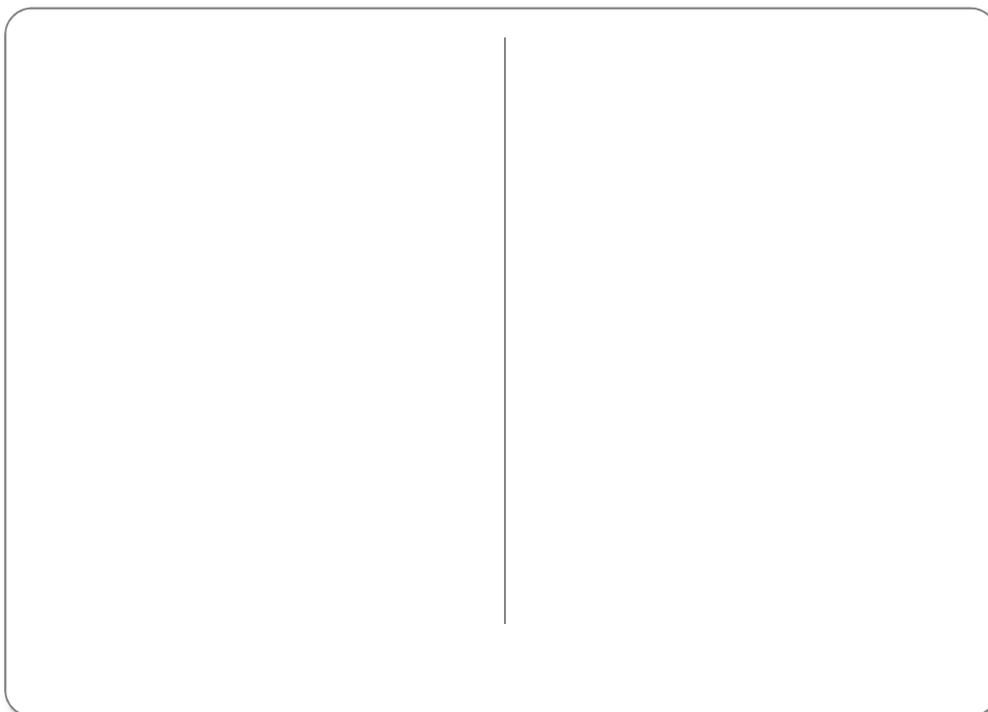
Two-thirds of businesses consulted had been trading for over five years and over 83% of businesses had been trading for at least two years and therefore the majority of businesses were able to offer an opinion on performance trends within their town. Businesses were asked whether the performance of their business had changed over the last two years. Figure 4 provides a break down by RA of the responses received and highlights that Swansea businesses had the most positive performance over the last two years whilst Colwyn Bay and Rhyl had the least positive.

Figure 4: In terms of your business, over the last two years, has your business performance improved, stayed the same or worsened?



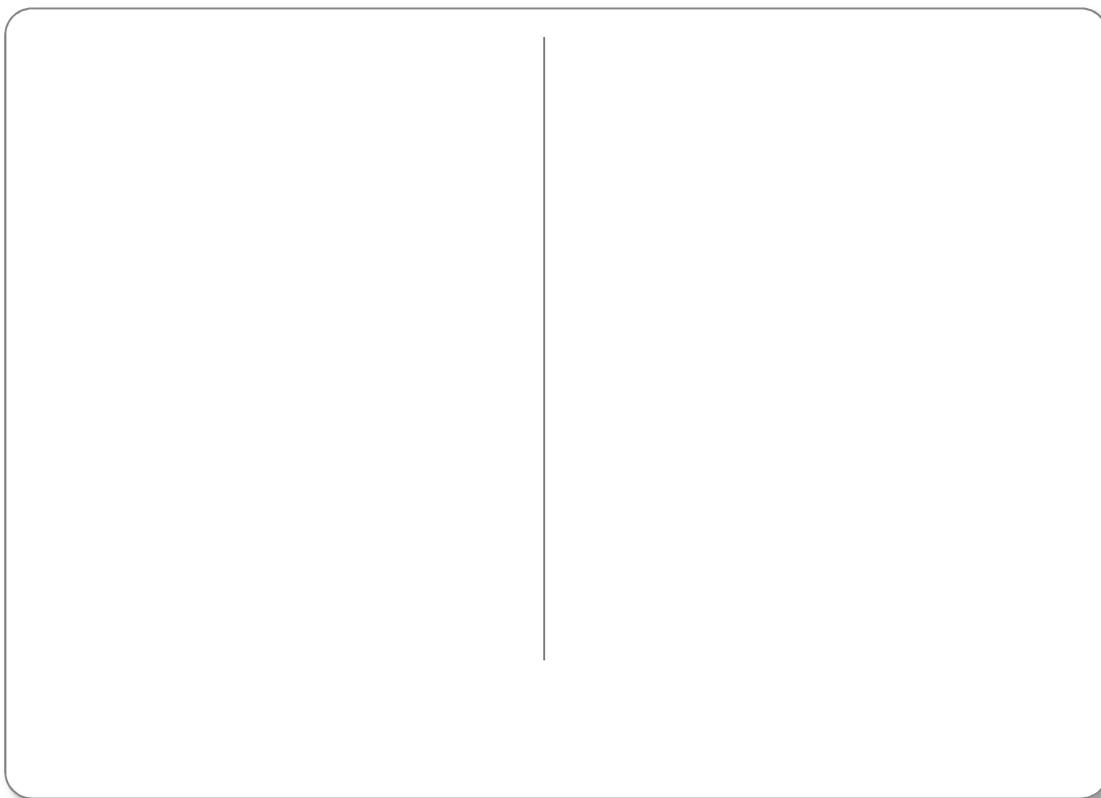
Businesses were asked the extent to which they were aware of regeneration activities within their town, figure 5 highlights a high degree of awareness, particularly so in Colwyn Bay and Rhyl. In terms of the nature of regeneration businesses were most aware of general improvements to the physical appearance of the town (particularly in Barry with 85% of businesses aware), followed by specific improvements to the seafront/promenade (with awareness of seafront/promenade works at 81% in Rhyl/Colwyn Bay).

Figure 5: Overall awareness of each element of regeneration:



Businesses were then asked to consider whether the nature of works that they were aware of were positive for their business, the community or the local economy. Figure 6 highlights that respondents were least positive about the works in terms of their own business (which may relate to the economic context at the time of the survey), particularly in relation to seafront and promenade improvements (with just 8% of respondent businesses citing these as positive in Colwyn Bay and Rhyl). However they were more positive for the economy and the community in general particularly where works were undertaken to provide facilities and activities for visitors to the town. Business in Barry and Aberystwyth were most positive about the improvements to the shopping environment on their business (67% of business respondents in both locations) which as a whole drew the most positive feedback from respondent businesses.

Figure 6: General perceptions of regeneration being positive for the business, community and local economy:



When asked which elements of the town and its hinterland should be promoted more, the coastal elements of each town were typically the most popular with Barry the only town where the high street was referred to more often than an element associated with the coast. Further details on the verbatim comments can be found within the annex to this report.

Table 13: What elements should be promoted more?

Location	Top Responses
Aberystwyth	Seafront/Promenade (34%), Town/Shops (12%)
Barry	High Street (33%), Barry Island (31%)
Mon Menai	Beaches (29%), Heritage/History (27%)
Rhyl and Colwyn Bay	Beach (26%), Promenade (11%)
Swansea	Beaches (27%), Gower (20%), Mumbles (14%)

4.5. Overall Programme Commentary

This chapter has explored socio-economic performance within the RAs, the outcomes arising from RA investment and the perceptions of the visitors and residents within the towns.

The socio-economic analysis explores the baseline and the existing socio-economic data and provides little evidence of RA areas out-performing the comparator seaside towns although Aberystwyth has, against some measures, out-performed other areas. More generally the seaside towns within North Wales have suffered over the 2008-2010 period to a greater extent than elsewhere and this is particularly the case in Holyhead.

In terms of results and outcomes arising from seaside town investment the crude value for money assessment suggests poor value for money from investment. However, the breadth of potential outputs, results and outcomes that RA investment can target, undermines the accuracy of value for money assessments based on cost per output alone (without assigning specific proportions of investment to the realisations of specific outputs or outcomes).

The estimated rate of private sector funding “induced” in the RAs is also considered to be a poor return and whilst it can be partly attributed to a weak economy and market failure, is also likely to have been influenced by the lack of an intervention rate for the programme. However, it is apparent from our review of monitoring information that the capture of outputs and outcomes is not comprehensive which severely impacts upon the accuracy of (and serves to under-value) a value for money assessment.

A more positive picture however is evident from the primary research undertaken with visitors and residents with almost 60% of visitors to the seaside towns stating that they had improved in recent years. Whilst businesses were less positive and their feedback has to be considered in the context of the current economic climate and the poor seasonal weather in 2012. With this in mind, aside from Barry, Colwyn Bay and Rhyl, where feedback was on the whole rather negative the business feedback would appear to be mixed.

Work Package 2: The Effectiveness of delivery and future priorities

5. Good Practice in Seaside Town Regeneration

5.1. Good practice

Seaside towns face a unique combination of challenges, many of which are complex and will take time to address. Many of these problems are as a result of changing patterns of tourism. Seaside towns, like other places, vary considerably, but there are examples of seaside towns and resorts that have developed and delivered a range of new and innovative approaches to address current socio-economic challenges. This section outlines some of the key ingredients for success and provides some example of seaside towns that have successfully implemented coherent regeneration programmes.

There is a growing body of evidence on seaside town regeneration. English Heritage and the Commission for Architecture and the Built Environment have both demonstrated success stories throughout England and the UK. Their joint report, "Shifting Sands" (2003) identified a number of key lessons for success, including:

- The importance of forming effective partnerships for success;
- Creating living communities, where people want to live, work and visit;
- Agreeing ways of measuring success;
- Recognising the effects of the seaside environment;
- Protecting the quality of beaches and the public realm;
- Stretching ambition;
- Promoting good design; and
- Restoring confidence.

5.1.1. Ingredients for success

We have reviewed examples of best practice in seaside town regeneration throughout the UK. From a long list of possible exemplars, we have identified two coastal towns whose experiences may be relevant to Wales.

Littlehampton is typical of a number of small seaside towns which have experienced difficulty in adapting to changing economic fortunes. The town has suffered the same decline as many other traditional seaside resorts and small manufacturing centres following the gradual demise of both industries between the 1960s and 1980s. Since that time, the town has suffered mixed fortunes although there are noticeable pockets of deprivation and the town's existing employment base is very fragile. The starting point was the Littlehampton Vision, a 25 year plan (produced in July 2004) setting out how the town centre and surrounding area could be developed. The Vision concept originally came from the Littlehampton Town Centre Action Group, which is a cross-sectoral group aiming to make the town centre more prosperous, vibrant and attractive to residents and visitors alike. The Vision indicates the rich natural assets of the town and how they could be better developed and identifies various "areas of opportunity" where existing land use is viewed as under-utilised.

The Vision findings have been accepted and approved by Arun District Council and the conclusions used to guide planning applications. The Vision provided the framework for a number of Early Wins projects, using limited regeneration funding from the RDA. Such work has included new decorative railings to planters, picnic benches and preparatory work for the new East Beach Café, which has been designed by the iconic architect Thomas Heatherwick.

Infrastructure regeneration in Littlehampton has had a flying start with the redevelopment of the previously derelict East Bank of the River Arun. The development encompasses housing of various types and tenures and cafes / restaurants, a riverside walkway which links to town to the seafront, the new "Look and See" Centre, a new youth hostel and an attractive street scene including sculptures. This development has won several national design and regeneration prizes. Further iconic developments have included the Long Bench, the UK's largest bench along Littlehampton seafront.

Key Lessons

- The importance of having a long-term plan, with community and stakeholder support, which also influences statutory planning and development;
- The 'domino effect' of using comparatively small investment in iconic, but not necessarily grandiose, cultural and functional buildings to inspire further development and attract businesses, new residents and visitors;
- The importance of joint, flexible working between the local authority, statutory funders and the private sector.

Weymouth has felt the combined impact of a collapse in traditional tourism, the decline of the commercial port and the loss (in the mid 1990s) of the naval base. Together, these trends accounted for an estimated loss to the local economy in the order of £40m a year, and were reflected in the run down condition of many of the town's Georgian and Victorian terraces. A long-term programme of investment in the Esplanade helped to create the conditions for the diversification of the local economy. External grant funding was important, but success was driven by a passionate commitment from all stakeholders (including the local community) to the town. The town has been able to take advantage of the harbour vacated by the Royal Navy with immediate access to challenging open-water sailing conditions. Becoming the centre to host the sailing events for the Olympic and Paralympic Games of 2012, the town gained a major advantage for inward investment at a crucial time.

Leadership by the council and effective partnership working (particularly with the business community) has been critical in driving forward regeneration in Weymouth and Portland.

Key Lessons

- The regeneration of historic buildings and the public realm has helped to restore the confidence of businesses and to act as a catalyst for private sector investment;
- Recognising the need to change leading to the local community taking control of their own destiny;
- Active drive to build on its unique assets, specifically water sports and other outdoor activities as well as branding itself as the gateway to the Jurassic Coast;
- Again, the importance of joint, flexible working between the local authority, statutory funders and the private sector.

What lessons can be learnt from these success stories? One feature that they have in common is a willingness to treat change as an opportunity. In addition, our experiences suggest that securing successful regeneration requires a number of key building blocks / themes, including:

- local leadership and ownership;
- alignment of private and public sector policies and agendas;
- clarity on outcomes – where partners have divergent views of the big picture, the prospects of success are severely compromised;
- maximising the impact of private and public sector investment in specific places;
- engagement and involvement of local people throughout the regeneration process, including an emphasis on creative partnerships and cooperation;
- the existence of economic opportunity – investment, whether public or private, cannot bring about sustained transformation where there is no opportunity for the market to work;
- an understanding that physical development on its own will not revive communities;
- a long timescale – regeneration does not happen overnight.

5.2. Local examples of good practice

Our research has identified many examples of good practice within all of the Regeneration Areas.

5.2.1. Dedicated Resource

Regeneration schemes are typically brought forward with greater efficacy where the Welsh Government, local authority(ies) or other organisations represented on the RA Board have expertise that can be dedicated to the realisation of projects. Close partnership working amongst representatives can enable the sharing and utilisation of expertise to accelerate this process but ultimately, a dedicated project manager provides the ability to drive project activity.

Case Study Swansea and North Wales

The provision of dedicated project management resources for major regeneration schemes has assisted the City and County of Swansea in the realisation of several of its projects. Dedicated resource with clear, direct links to representatives for the RA Board/Delivery team enables close scrutiny of schemes as they evolve and also provides the necessary resource to explore, identify and potential lever in other monies. Similarly, in North Wales, each of the local partnerships (Rhyl Going Forward, Bay +) have programme teams in place, which have been key in project inception and implementation and in refreshing local action plans.

5.2.2. Localised role of Welsh Government

It is apparent that where Welsh Government representatives are based within or near RAs, with close linkages both at a strategic and community level provides a more effective working relationship. A number of RA Welsh Government representatives highlight the sometime ad hoc, reactive/responsive (in addition to the more proactive and strategic) role that they play which often demands personnel in situ to build informal relationships, identify key players and gain a first hand perspective of the issues and opportunities within the town.

5.2.3. Tightening the Scope of the RA Agenda

The RA programme and framework has a necessarily broad remit with what are described as three very broad outcomes, outlined within the Regeneration Framework:

- Increasing prosperity and wellbeing for the whole community;
- Moving towards low carbon communities;
- Improving life chances for children and young people.

The determination for how these outcomes are to be achieved was assigned to the RA Board and Delivery Partners in each of the RAs to set out within their action plans.

In some areas action plans have perhaps been insufficiently “tight” and in being so, has led to a plethora of project ideas emerging which in turn are difficult to reject purely on the basis of misalignment with the action plan. In other areas the scope of these outcomes has been tightened effectively both in terms of the nature and location of activity sought.

Case Study – Aberystwyth and the Bay Life+ Programme

The action plan for Aberystwyth is driven by five objectives:

- Creative a thriving and attractive town centre
- Improving the quality of homes for local people
- Enhancing transport in and around the town
- Re-invigorating the seafront and promenade
- Boosting the economy and employment

Whilst several of these objectives are broad ranging, each is underpinned by a clear and succinct suite of actions that tie the objectives down to specific areas (of geography and/or society) which provides clear direction for RA investment and activity without being so prescribed that innovation is restricted. By way of example, the objective of reinvigorating the seafront and promenade of Aberystwyth is underpinned by a series of key action points:

- Consider the future of empty properties and improve the appearance of key buildings
- Make improvements to the public spaces
- Increase the number of activities held on the promenade

This approach has enabled the RA to actively promote the types of activities on offer to facilitate increased community interest whilst minimising the danger of being overrun with expressions of interest for the realisation of small scale isolated projects.

The Bay Life+ programme in Colwyn Bay has focused on a small number of ‘game-changing’ projects that together will radically improve the performance of the town. RA investment in the town centre, waterfront and Parc Eirias is already having a major impact in restoring confidence and acting as a catalyst to attract further investment (public and private).

5.2.4. Establishing a strong baseline/evidence base

Baseline evidence within each of the RAs is often minimal in scope and scale or incidental (in that it was developed for preceding initiatives and subsequently usurped through the arrival/designation of the town as an RA. This is of particular pertinence within seaside towns where an understanding of the nature of the visitor market and the local business climate (particularly in terms of issues/opportunities associated with both groups) is of critical importance for their continued resilience and future success.

Furthermore, from an evaluation perspective, the ability to track change and impact arising from capital investment and then to attribute this investment to change is constrained where primary and secondary data is inappropriate or absent.

Case Study – Aberystwyth

Aberystwyth benefitted from a comprehensive socio-economic evidence base of predominantly secondary research developed as part of the master-planning process which preceded its designation as an RA. However in addition, comprehensive primary research was undertaken with almost 700 interviews with businesses and residents to capture perceptions people have of living and working in Aberystwyth. Whilst the research was not specifically linked to RA designation, it was resourced an undertaken in support of the Assembly Government’s work to develop a baseline against which the impact of any future regeneration activities in the town could be measured.

Whilst the research would have been aided by an additional cohort of visitors that were surveyed to capture perceptions of their experience of the town, it nevertheless provides a strong evidence base for revisiting at an appropriate juncture, later within the RA process.

5.2.5. Effective Future Planning

The onus on annualised spending combined with a general emphasis on expenditure is reported to have limited the ability of RA Boards to retain a strategic focus and to forward plan project activity.

Case Study – Swansea and Mon a Menai

Swansea RA have developed a schedule of pipeline and existing RA projects detailing likely RA spend over a five year period to assist in planning and appraising project applications. The approach allows the team to plan for schemes in the pipeline whilst ensure that project spend remains within the annualised spending plans. A similar forward planning process for Mon a Menai has identified a range of project ideas to meet the aspiration of creating a low carbon economy for the area.

5.2.6. Supporting Third Sector Involvement

The project application process for RA funding is rigorous and can be somewhat daunting for potential applicants. In seaside towns where there is a desire to promote the funding pot to facilitate new ideas, particularly from community based groups the lack of capacity can lead to significant WG resource (in the form of personnel) being drawn upon to assist with the application process. Revenue monies and RA staffing quotas are small and therefore resource to facilitate this support is limited.

Case Study – Barry

Barry RA have introduced a project development fund which provides small-scale resources to assist third sector organisations with bidding for RA monies. It is hoped that this will strengthen the third sector and increase collaboration between third sector organisations within and around Barry.

6. Strategic Design and Development

In considering the nature of investment in seaside towns within RAs it is important to consider the strategic context associated with the development of the RA programme.

The Regeneration Area programme emerged from the two headline commitments in “One Wales”¹⁰ relating to regeneration, namely “*we will continue key regeneration programmes in the Heads of Valleys and Môn a Menai*”. In addition to the continuation of these two programmes an additional five regeneration areas were established with the aim of “*establishing integrated and cross-cutting initiatives aimed at economic development and regeneration, particularly in areas of high deprivation*”. The five additional RAs were to use the existing models within the two key regeneration programmes as exemplars.¹¹

There are three very broad outcomes associated with RA delivery:

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

Whilst the RA programme does not have a specific focus on seaside towns, six of the designated RAs incorporated coastal areas within them, of which five were considered to encompass conurbations that could be considered seaside towns.

The designation of RAs was rather sporadic with designations (excluding Heads of the Valleys RA) taking place from 2008-2010. The rationale for designation was specific to each RA. It sought to utilise opportunities where need and opportunity existed, in reality (it is perceived) that the former took greater precedence in driving designation than the latter. Furthermore, there was a lack of clarity over rationale which served to confuse initial focus and to stoke up concerns amongst non-designated areas as to why they had missed out.

Following RA designation, each area established a Regeneration Area Board, chaired by the Welsh Government with additional regeneration area team resource. The Board included representatives from the local authority and representatives of other public, private and third sector organisations. RAs were tasked with developing a strategic plan and annual investment plan for ministerial sign off. This provided a useful opportunity to tailor the rather broad based ambitions of RA to the specific needs and opportunities within that RA (this was seen to be particularly effective in Aberystwyth – further details are contained within the good practice case study in section 4 of the report).

In RAs where there was a poor history of strategic direction and governance for this specific RA area this triggered intense activity to put this in place. This took time which, in turn created additional pressures in relation to incurring project and programme expenditure. Conversely, where strategic direction and some form of governance already existed the designation of RA provided useful impetus to begin enabling the realisation of pipeline projects and to galvanise project ideas of appropriate alignment.

¹⁰ One Wales. A Progressive Agenda for the Government of Wales. An Agreement between Labour and the Plaid Cymru Groups, (2007)

¹¹ Framework for Regeneration Areas, Welsh Government (2010)

Case Study: Swansea

The development of the Swansea implementation plan was aided by a clear strategic direction within the city driven by a joint venture agreement between Swansea and the Welsh Government associated with the realisation of Swansea's Economic Regeneration Strategy 2020 and also through the City Centre Strategic Framework.

All RAs were allocated a specific budget and associated period over which that budget was to be spent. In addition, in accordance with Welsh Government protocol, each RA had annualised spending targets.

Focus on seaside towns

The focus on regeneration of seaside towns fluctuates from one RA to the next. Barry's RA is co-terminus with the town boundaries and as a principal seaside town, arguably all RA investment is linked to seaside town regeneration. A similar point can be made for Swansea and Aberystwyth (albeit that their role as a traditional seaside town is less salient).

In the North Wales Coast, the design of the strategy and action plan reflected the seaside nature of the coastal economy, and had a specific focus on addressing the deep rooted structural problems linked to the demise of the traditional seaside resort. Although RA investment is funding a range of projects in Rhyl, the overwhelming priority is 'needs-driven', specifically to address the higher than average proportion of (poor quality) small and cheap private sector housing units. The Bay Life+ programme in Colwyn Bay is more focused on using RA (and other public sector investment) to take forward the opportunities within the town, e.g. Parc Eirias and the Colwyn Bay Waterfront project (including the iconic Watersports Centre). Indeed, the masterplan that has provided a framework for physical regeneration activities set out as its challenge:

*"to re-invent Colwyn Bay as a 21st century town with a renewed focus on its role as a seaside town and an attractive place to live, visit and invest."*¹²

The Mon a Menai programme was a pre-emptive response to the planned closure and decommissioning of Wylfa power station and set out a programme to strengthen the economic competitiveness in the wider sub-region.

All of the 5 RAs recognise the importance of the tourism sector and have introduced a range of projects to strengthen the sector to meet the changing patterns of visitors. Many have introduced niche projects to diversify the tourism product offer through building on coastal assets, e.g. the watersports centres in Colwyn Bay and Swansea.

¹² Colwyn Bay: Masterplan, Shape, October 2010

Board and Steering Group Evolution

The governance models for each RA has brought together strategic representatives from the public, private and voluntary sectors. In many instances RA catalysed the bringing together of the partnerships which in turn took some time to bed down and gel. The emphasis on incurring expenditure, particularly within the early stages of each RA gave real impetus to the role of the Board but did, reportedly, limit the extent to which they could have a strategic focus. In the more latter stages of the programme there appears to have been something of a divergence in the role and remit of the Board with some RAs describing the role as maturing into a partnership that offers strategic insight and focus with others feeling that the momentum of the Board has waned somewhat. Some referred to a diminishing ministerial presence and Board meetings as a contributory factor in the loss of enthusiasm whilst others referred to a lack of budgetary responsibility and accountability (as highlighted elsewhere in the report the funds were very much seen as the Welsh Government's and in particular the Minister's resources to ultimately spend as they wished) and that this may limit the likely sustainability of the Boards following the cessation of the RA programme.

Across all RA there is also an apparent lack of sharing of practice and lessons learnt. Given that the RAs are geographically disparate, information sharing can prove challenging although it was felt that alternative methods of information sharing could and should be explored.

7. Delivery Models and Management Systems

As outlined within section 6, the model of approach for RAs was originally conceived to follow the models applied within the Heads of Valley and Mon a Menai RAs.

All RAs have a Board and Delivery Partnership and all have developed an implementation plan and action plan (albeit the title and form of these plans fluctuates from one RA to the next). Indeed, in the North Wales Coast there are, in effect, two programmes covering Rhyl and Colwyn Bay respectively.

The extent to which RA is promoted as a funding pot again differs from one RA to the next. In Aberystwyth for example there is active promotion of RA to encourage project ideas. Aberystwyth is able to do this in the research team's opinion for two reasons; the action plan tightened the scope of the RA programme significantly, providing clarity the desired objectives and outcomes for RA within the town and in doing so, providing clarity regarding the nature of investment that may be deemed eligible. In addition the smaller scale RA in an area covering a smaller population is likely to generate a smaller number of ideas than more populous RAs.

In other areas, most notably Swansea any active promotion of the RA has been avoided. One reason for the adoption of this approach was a fear of being overrun with potential proposals for investment (however it is noted that a Swansea Regeneration Area Community Fund was made available for capital projects of less than £20,000). The Board were keen to avoid this given the extensive masterplanning and strategic direction developed within Swansea, this background presented an opportunity for a large proportion of the RA funds to be used to realise the specific project ambitions established within these.

In terms of specific project activity, the majority of RAs have sought to invest some of their resource in public realm and accessibility improvements, to and from and along the seafront (Swansea, Aberystwyth, Mon a Menai and North Wales Coast). Many have also sought to improve the nature of services and facilities along the seafront (the watersports centre in Swansea, consultation on the Bandstand in Aberystwyth and Parc Eirias in Colwyn Bay). However, beyond these schemes, there has been a great deal of diversity of approach.

In the North Wales Coast the majority of resources have been invested in the housing stock whilst in Barry, RA investment has primarily targeted small-scale community based schemes. The diversity of investment provides an insight into the flexibility of the programme.

Whilst the initial approach for bringing forward project ideas fluctuates from one RA to the next, there is consistency in WG representatives then adopting a case officer approach. They are typically alerted to a project idea and if it is perceived to align with the action plan, work with the project applicant to develop the project idea further.

A two-tiered project application system is used for new projects based on value of application with "small" grant applications (under £25,000) using one form and those applications for greater than £25,000 using another.

Project applications are appraised by the Welsh Government Regeneration team within each RA with appraisals and applications provided to each RA Board for further consideration. Project applications, if approved by RA Boards are then given to the Minister for sign off. It is interesting to note that Ministerial sign off appeared to influence the perceived level of ownership amongst each Board of RA projects. The Boards typically perceived RA projects as “the Minister’s projects” and not “the RA’s/out town’s projects”.

Forward planning of RA project activity (particularly pipeline projects) does generally appear a little less strategic and forward thinking than would be expected from a programme of this scale. This perhaps reflects the focus on annualised spend and on expenditure in general. In Swansea a project prioritisation spreadsheet which includes pipeline projects and forecasts likely delivery and expenditure over 5 years whilst working within the annualised spending parameters, offers a useful outline of future RA direction and delivery.

Monitoring of Delivery

The project application and appraisal systems utilised as part of the RA programme explore the likely outputs and outcomes resulting from project investment. However, as outlined within Section 4 of this report, the monitoring of the array of outputs and outcomes for these projects does appear however to be a little patchy. Regeneration activities that have drawn in funding from other sources (particularly EU Convergence funding) typically appear to have more comprehensive data associated with project delivery. However it is clear that this is driven by EU funding requirements rather than Welsh Government Regeneration funding requirements and appears a missed opportunity and heightens the danger of under accounting for the returns generated through RA investment.

8. Future Priorities

Our research and discussions with local regeneration practitioners seem to indicate a growing recognition that coastal towns and their challenges and opportunities are a legitimate special interest group. Although in its early days, the extension of the Coastal Communities Fund (although small in scale when compared to other past regeneration programmes) demonstrates that coastal towns and communities should be regarded as places in need of focused attention.

Although there are clear differences in the scale and scope of challenges faced within the five RAs, there are a number of common features, which help to shape future plans, specifically:

- Generally lower economic activity and employment rates;
- High concentrations of economic inactivity and higher ‘structural’ unemployment rates;
- Relatively low skilled profile of its workforce;
- Lower business density and business start-up rates;
- More traditional industrial activities, including lower value added manufacturing and the visitor economy;
- High dependence on public sector employment;
- A low proportion of employment in knowledge based sectors, especially in the private sector;
- A greater proportion of people already over retirement age than the regional average, with projections of further ageing;
- Relatively poor infrastructure and connectivity.

Whilst investment has been a significant step in the right direction, long term problems remain. The features identified above provide a framework for future priorities.

Employment growth and local jobs

Coastal communities continue to face significant economic challenges and it is not surprising that local areas have identified jobs and the local economy as over-riding priorities (which reflect the Growth and Sustainable Jobs priorities outlined in the Welsh Government’s Programme for Government). The principle of investing in infrastructure, skills and supporting the business environment continues to be crucial as is the links and effective integration between physical regeneration, economy, education and skills to address deprivation issues.

Further diversification of the local economy

All partners recognise the need to support the diversification of the local economy away from their traditional offer. Diversification is absolutely crucial for seaside resorts that can no longer rely on the traditional bucket and spade holidays. Although tourism can be the catalyst for regeneration, it is not the only, or even prime, solution in every instance. The illuminations in Blackpool have been extending the season for more than 70 years. Bournemouth and Brighton are excellent examples of seaside towns that have successfully repositioned themselves as venues for conferences, exhibitions and trade fairs. There are also opportunities to develop as heritage centres, bases to visit nearby attractions or any other number of niche markets. Indeed, Colwyn Bay and Swansea are already diversifying their visitor product offer towards new and developing markets through investment in water sports facilities.

Attracting private sector investment

Private sector investment is an essential component in the effective delivery of seaside town regeneration and represents a central theme in current government policy. However, urban regeneration traditionally has been perceived as a high-risk, low-return investment. All RAs, specifically the North Wales Coast and Mon a Menai, have struggled to secure private sector investment to drive forward major regeneration schemes. Given the outlook for public finances, the over-reliance on public sector investment is no longer viable and the future priority is to focus on how areas can provide confidence and facilitate greater private sector involvement and investment.

Strengthening the visitor offer

Tourism continues to be an important sector, which still presents opportunities for the future. Coordinated actions are still needed to create a stronger, sustainable tourist economy. There is now, more than ever, a reliance on successful partnership working between the public and private sector. Destination Management Partnership will continue to have a key strategic role in strengthening and developing the visitor offer and wider product-mix.

9. Conclusions and Recommendations

9.1. Summary conclusions

The report has focused on providing a clear, evidence-based process to:

- Determine the effectiveness of the impact of the investment in seaside towns;
- Assess the effectiveness and efficiency of delivery; and
- Suggest future lessons that can be embedded within future regeneration policy for seaside towns.

The review has been undertaken whilst the programme is still in operation; therefore, whilst there has been a requirement for a review of impact arising from the investment, the timings are such that there is a greater level of evidence to draw on associated with process-based findings. Furthermore, it is important to highlight a number of key factors that have impacted on our ability to provide a robust analysis and assessment of the impact and outcomes of regeneration investment on seaside towns:

9.1.1. Impact of Seaside Town Investment - Limitations

Lack of a distinct focus on seaside towns

The RA programme has a very broad remit and the designated geographies of RAs also encompass inland in addition to coastal areas. These factors have served to dilute any potential distinctive focus on seaside towns. Where geographical focus on a specific town/city does exist (in Swansea, Aberystwyth and Barry), there is a lack of consensus as to whether Swansea and Aberystwyth are “seaside towns” (previous elements of research have suggested not and the data analysis does tend to reinforce this assertion) whilst in Barry, RA investment to date has predominantly been targeted at the community.

Limited timeframe within which to assess outcomes

Whilst Mon a Menai commenced in 2008/09, NWC RA commenced the following financial year and the remaining three commenced in the 2010/11 financial year. Physical regeneration (which has been the emphasis of the RAs given the capital-revenue split) takes far longer than two years to realise significant benefits and outcomes. In successful instances, small-scale projects have been completed whilst major projects are still being finalised; in less-successful instances, these schemes are in the formative period. A significant amount of investment has continued to be made in the West Rhyl Housing Renewal Area; yet it is unlikely that any major outcomes will be realised within the next 5-10 years. However in all cases limited structures exist within the programme for measuring and attributing the outcomes that may emerge.

Changing economic context

The RAs with a coastal element were designated no earlier than in 2008, at a point where the economic downturn was beginning to take hold. Since 2008, the UK economy has suffered a double-dip recession and at the time of writing, remains in the second of those recessions. Amidst a weak economy it is difficult to identify socio-economic impact and progress and whilst a series of comparator towns were identified to benchmark any change, wider issues associated with a reluctance from/inability of the private sector (and following austerity measures, the public sector) to invest have meant that the catalytic impacts synonymous with effective physical regeneration, have been far harder to come by.

No consistent baseline established

A lack of consistent baseline data exists across each of the RAs and in research impact, a retrospective approach to analysis has been adopted. However reliance upon historical secondary data alone is limited in its usefulness, whilst you may be able to identify change, attributing that change to RA investment or otherwise is fraught with difficulty (with the research team resorting to the use of comparator towns). Secondary data is of most use when combined with the perspectives of residents, businesses and visitors. Whilst some primary research has been undertaken as part of this review, it is insufficient in scale to provide the necessary statistical robustness on a town-by-town basis.

Impact Assessment

In spite of the lack of a baseline there are indications that investment is benefiting the RA coastal towns. Sixty per cent of repeat visitors for example felt that the town had improved in recent years (with the figure rising to 86% in Barry), however businesses were less positive about their business performance over the last two years with a net rating of minus 21%. However it is important to bear in mind that the research was undertaken during the wettest summer for 100 years so an element of negativity amongst businesses is inevitable).

9.1.2. Process Based Assessment of Efficacy of Approach –Limitations/Lessons Learnt

The RA programme has suffered from inconsistency in approach. There is a lack of clarity around rationale for investment across all RAs (admittedly this fluctuates from one to the next). A lack of rationale brings forth a lack of clear direction to respond to the rationale which can lead to limited focus on what each RA is trying to achieve strategically.

RA Board and Delivery partnerships have (rightly) been given the lead to refine and develop their action and implementation plans for delivery and whilst there was an initial aspiration to follow the Heads of Valleys structure and process, in reality RAs have conceived their own ideas. This level of flexibility brings with it innovation and there are some very effective practices being adopted (the action plan in Aberystwyth and the project prioritisation process in Swansea are two such examples), however there appears to be a lack of networking and sharing of practice amongst RAs which is a missed opportunity.

Furthermore, whilst Strategic Boards are seen as being important in representing stakeholders interest, they do not influence investment spend, which is very much perceived as being under Welsh Government (and particularly ministerial) control. In addition, a perceived lack of cross-departmental working has meant that regeneration activities have tended not to benefit from other programmes and initiatives (Visit Wales TISS for example).

Whilst project applications utilise a consistent proforma, programme monitoring appears ad hoc and inconsistent, fluctuating from one year to the next with no rigorous collective (cross RA) monitoring of RA investment.

The aforementioned issues associated with a lack of baseline information is compounded by an emphasis on output (rather than outcome or impact) collation for project delivery. It is reported that in appraising project applications this information is captured as part of the ex-ante assessment however it would appear that this isn't revisited as part of monitoring during delivery.

A major hindrance on the efficiency and effectiveness of the regeneration programme is the allocation of a specified budget to be spent over a specified timescale. This approach distorts the focus of RAs towards a priority target of expenditure incurred with all else secondary to this. This distortion is compounded by demands for annualised spending targets which on a positive side focus the mind on delivery but in some instances, at the expense of strategic, flagship regeneration schemes (Barry Island for example) that could bring about fundamental change.

Another issue that has emerged in many of the RAs is the general lack of leveraging of other monies (either from the private, third or indeed public sector). Whilst it is recognised that the economic downturn and public funding cuts will have acted as a major constraint on ability to lever-in funding, in isolated cases it has been successfully achieved (Swansea Watersports Centre for example) indicating underlying potential. A further constraint on attracting other capital is the lack of a specified rate of intervention, which coupled with a lack of clarity around outputs (one of which is investment leverage) and the demand for annualised spend have collectively acted as disincentives to actively exploring this route of investment.

9.1.3. Success – Strategic Outcomes

RA investment has brought with it some significant successes. Investment has galvanised commitment and momentum, at a strategic level but also amongst delivery partners and communities. Certainly at the outset of designation, there appeared to be more of a “can do” attitude in a number of RAs, with clearer ideas of direction and many pipeline projects emerging.

RA investment has also brought key players together representing a wide variety of interests. The Board and (to a lesser extent) Delivery Partnerships acknowledge that whilst as a partnership they took time to gel, debate and constructively develop ideas, that they are now thinking strategically and are perceived to be working effectively.

RA investment in seaside towns has spread over a relatively large number of projects and appears to have significant added value where used as a catalyst to lever in funding or to gap fund initiatives. The investment has catalysed regeneration by becoming the ‘dealmaker’ enabling projects to be brought forward more quickly.

Whilst there is recognition of the importance of the visitor economy across all of the coastal RAs there is also recognition that seaside tourism alone is not the magic bullet for addressing high levels of deprivation. Furthermore the terms “seaside tourism” and “seaside towns” creates images of bucket and spade tourism which is not synonymous with a number of the aspirations for towns (including those designated as being seaside towns).

9.1.4. Successes - Impact

Investment has funded a relatively large portfolio of projects, consisting of multiple components, across the spectrum of regeneration activity. Whilst quantifiable impact is difficult to identify there are a number of good examples of successful resort regeneration activities. There are also patterns and regularities to programme outputs across each of the five RAs. Visitors and businesses were quick to identify public realm, promenade and town centre improvements, which have all had a role in uplifting the quality of experience within seaside towns.

Furthermore RA investment (as outlined earlier) appears to add significant value when used as a catalyst to lever in funding or to gap fund initiatives (although this approach has been more successful in some RAs than others).

There has been a strong focus on physical regeneration (largely driven by the capital-revenue split of the RA programme), for example in the provision of quality new facilities that were not previously present within the seaside town, e.g. Parc Eirias Events Centre, developing cruise tourism in Holyhead. It is too early to assess whether the resort regeneration activities will achieve their aims and actually change the visitor profile at sites and in resorts. But in many instances, the signs are encouraging. The state-of-the-art sporting and events arena at Parc Eirias is not only delivering successful events, it is also increasing media coverage and changing the tone of coverage to be more positive than previously.

Across the 5 RAs, it is noticeable that the design, development and implementation of an area-based masterplan has led to more focused and coherent actions on the ground (even where the masterplan pre-dates and has largely been updated through the RA strategic planning process).

9.1.5. Future priorities

Given the relative failure (over the short / medium term) to induce market forces into seaside economies and a predicted future of low / no economic growth (in the near term) coupled with reduced public and individual spending, what should be the future priorities for coastal regeneration?

Our analysis and discussions with stakeholders on the ground indicate that a clear priority continues to be the need to grow the economy in a sustainable way. The focus needs to be on economic growth in coastal communities (jobs and employment), which leads to prosperity and provides the means to tackle poverty and disadvantage. Regeneration is addressing market failure in economic terms and building the confidence in communities to invest in their economy. It is also about realising the untapped opportunities of individual locations, their distinctive assets, their past heritage, new cultures and proximity to other regional assets. Long term transformational change requires a balance between need and opportunity, with a smaller number of strategic priorities.

Seaside towns need to diversify away from their traditional narrow ‘bucket and spade tourism’ focus, reflecting the needs of visitors whilst at the same time not losing site of the USP of being coastal.

However, there is general consensus emerging through our research that there needs to be better strategic alignment across WG departments (education, business and skills) to address the needs of coastal communities.

9.2. Future recommendations

The coast of Wales has played a unique role in the history, heritage and culture of the country. Today, 60% of the population live and work in the coastal zone and 70% of the Welsh coastline is recognised for its environmental importance and beauty¹³.

Coastal communities in Wales continue to experience economic challenges as a result of:

- the fragile nature of the coastal economy, including changing patterns of tourism
- pockets of high levels of multiple deprivation
- the nature of the housing market and
- peripherality and isolation
- infrastructural issues (road/rail and ICT)
- environmental issues/sensitivities

In contrast to other GB destinations, trips to seaside/coast dominate the Welsh holiday market with 34% of all visits and 33% of all spend compared to 18% and 17% in England and 12% and 11% in Scotland¹⁴. Developing the tourism potential of the coastline in a sustainable way and supporting coastal tourism remains a clear commitment for the Welsh Government. However, the future prosperity of seaside towns will depend not only on tourism activity but also on strengthening the local economy to provide additional employment and income opportunities for residents.

In considering any potential future emphasis on seaside towns it is important to assess the extent to which they are socio-economically disadvantaged compared to other areas within Wales. Our baseline research backs up the benchmarking study undertaken by Sheffield Hallam University in 2009/10.¹⁵ On some indicators, Welsh seaside towns emerge as more disadvantaged than Wales as a whole, including:

- Employment rate
- Working-age benefit claimant rate
- Seasonal unemployment
- Earnings
- Housing lacking key amenities

But, there are substantially more indicators on which the **average** for Welsh seaside towns is not far from the average for Wales as a whole. One key feature is the diversity between **individual** seaside towns. Many coastal towns are performing well; whereas others (notably Rhyl and Holyhead) continue to experience severe levels of multiple deprivation. The challenges and problems facing seaside towns are complex and will take time to address but the scale of need and opportunity does provide a case for a strategic response to coastal regeneration in Wales.

We set out below some suggested recommendations to assist the Welsh Government with its future approaches to regenerating coastal communities.

¹³ Welsh Government website: Environment and Countryside April 2012

¹⁴ Visit Wales Briefing Note, June 2012

¹⁵ Seaside Towns in Wales: A benchmarking study, CRESR Sheffield Hallam University November 2009.

Recommendations

2. Consider broadening the terminology (and therefore focus) from seaside town to coastal town/coastal community.

The term seaside towns can bring forth visions of bucket and spade resorts and therefore precludes settlements utilising marinas, maritime heritage and culture and wider coastal and leisure to attract visitors. These conurbations benefit from similar selling points and opportunities but are also constrained by similar issues and needs.

2. Review and up-date the *Seaside Towns in Wales: A benchmarking study* and develop a robust coastal baseline to provide an information base on coastal towns and communities in Wales.

The benchmarking study provides a good commentary and information base on seaside towns in Wales. The study needs to be up-dated to provide a defined range of baseline socio-economic indicators (based on the baseline analysis included in this report) to measure performance and make comparisons between seaside towns/coastal towns in Wales and elsewhere. There is also a need to identify the nature of the visitor market (seasonal/year round, local/national, day visit/tourist “hub”) that the town serves.

Furthermore, where there are plans for significant investment there is a further need to undertake primary research to capture perspectives and to assess change and impact to help build an understanding of what is needed as well as what is and what isn't effective and why.

4. Develop a more sophisticated management information system to capture outputs, outcomes and impacts arising from investment.

In addition to the primary and secondary research, more comprehensive (and consistent) monitoring and evaluation methodologies need to be factored into project investment. This needs to be implemented throughout the programme rather than merely post investment to improve understanding of the wealth of outcomes and impacts arising.

4. Consider increasing the Coastal Communities Fund ‘pot’ for Wales to drive forward economic development and job creation in coastal areas.

Despite some concerns regarding management, there is support for the economic development / job-creating ‘thematic’ focus of the CCF. The issue for Wales is the scale and scope of the CCF funding pot, which is seen as being too small to really make an impact and support local economic development in coastal communities that will have real impact.

The CCF model brings forth an element of competition which theoretically should drive efficiency in approach. If structured appropriately, it will also galvanise collaboration and can support innovation and address specific needs.

5. Provide targeted resources to back major investment plans that have a 'catalytic' effect to stimulate the growth of seaside resorts in areas of greatest need.

This report is not intended to evaluate the impact of RA in Wales. However, the scale of need and market failure in Mon a Menai and the North Wales Coast demonstrate a continued need for investment to revive seaside communities, which are still struggling to address new economic and social challenges. Investment will need to focus on stimulating economic activity through a total-approach linking physical regeneration opportunities to economic inclusion.

6. Provide greater incentives to encourage funding leverage particularly from the private sector.

RA investment appears to have significant added value where used as a catalyst to lever in funding or to gap fund initiatives. However, there continues to be an enormous challenge in attracting commercial funding into coastal resorts, which is demonstrated in the lack of private sector leverage in many RAs. Greater incentives need to be put in place to encourage funding leverage the implementation of a maximum intervention rate would also strengthen the need to leverage in other monies.

7. Improve the sharing of lessons between public agencies, stakeholders and other partners exploring ways to support coastal communities, particularly cross-RA programme learning and wider dissemination.

There are a number of good examples of project and programme design and delivery; the projects are also notable for the number and range of partnerships with other organisations that are required to develop and deliver projects. Mechanisms need to be put in place to improve the sharing of lessons and good practice in addressing coastal regeneration.

8. Put in place formal mechanisms in the WG to increase strategic co-ordination, alignment and partnership working

The Welsh Government needs to ensure a more joined-up approach to cross-cutting issues affecting seaside/coastal towns. A strengthened cross-department working group (based on the group set up to monitor the Coastal Tourism Strategy for Wales) needs to co-ordinate action across departments on policy and actions for coastal towns.

9. Encourage and support investment into developing a dynamic visitor offer associated with "place-making" based on local assets and distinctiveness.

All the RAs have a priority focus on developing the visitor economy. Concerted actions are needed to encourage investment to extend the season and improve the quality and diversity of the coastal product. Destination Management Partnerships will have a key role in providing leadership and co-ordination.

10. The strategic partnerships established as part of RA designation need to continue to provide strategic direction, influence and drive delivery. A greater sense of ownership over project activity may provide the impetus required.

A significant outcome arising from the RAs is the convening of strategic partnerships to drive investment. The momentum and enthusiasm for these has waned somewhat particularly where Ministerial attendance at meetings has lessened. There is a perception that the programmes and related project activity are the decision of the Minister and are therefore owned by the Minister. Allied to this there is also a fear that the loss/end of funding will lead to the cessation of these partnerships.

A greater level of perceived ownership along with clarity surrounding roles and responsibilities within these partnerships may strengthen the likelihood of their continued existence (particularly if the roles/responsibilities assigned to these partnerships are of greater than they are currently perceived to be).

Annex 1: Verbatim Responses to Surveys

Please see separate document

Annex 2: Detailed Socio-economic Analysis

Please see separate document

wavehill

ymchwil gwerthuso arolygon
research evaluation surveys

Tel / Ffôn: 01545 571 711

Email / Epost: wavehill@wavehill.com

Website / Y We: www.wavehill.com

Wavehill Ltd, 8 Water Street / 8 Heol y Dŵr, Aberaeron, Ceredigion, SA46 0DG

REGENERATION: REVIEW OF ECONOMIC EVIDENCE

1. Purpose

This note updates a brief review of key *economic* evidence relevant to regeneration undertaken in 2008-9¹. It incorporates more recent findings, but is not intended to be a fully comprehensive literature review. Statistics used are not the always latest, but are cited only where there are good grounds for supposing that the picture presented remains representative. Where the Welsh Index of Multiple Deprivation (WIMD) is cited, this refers to the data collected in 2007

2. Summary and key points

Regeneration is a very broad term which encompasses a wide range of possible interventions, each requiring its own justification, although applying interventions in combination may yield additional synergistic benefits.

Clarity over rationale and objectives is a pre-requisite for designing effective interventions.

Evidence of effectiveness in practice is limited because of the difficulties in establishing the counterfactual, but also the multiple, small scale, and temporary nature of many of the interventions.

This may point to the case for a smaller number of more major interventions sustained over the long term.

Long term economic outcomes facing individuals are much more influenced by personal characteristics (for example, qualifications) and family background (for example deprivation) than place of residence.

Deprivation shows some spatial concentration, but many deprived people live outside those areas normally identified as the most deprived.

Better educational outcomes are vital to improving people's long run life chances, and the prospects for effective intervention are greatest during the early stages of life.

Putting these last three points together suggests that policies targeted at areas are unlikely *by themselves* to secure such long lasting improvements in the socio-economic outcomes facing individuals. But the other aspects of the case for area-based interventions remain valid (provided that the individual interventions can be shown to be effective).

Regeneration can aim at correcting economic market failures or securing social and/or environmental objectives.

¹ It is not therefore intended to be the kind of comprehensive assessment undertaken in *The Impact of Devolution: Area-based regeneration in the UK*. Adamson, D. Joseph Rowntree Foundation 2010.

Physical regeneration retains a compelling rationale in terms of addressing economic market failure, but may do little to benefit disadvantaged people directly.

Physical regeneration that is intended to address market failure is most likely to be successful when the other elements necessary for economic success are present, and that success should become self-sustaining (and for this reason the intervention should be time-limited).

Physical and social interventions are also justified as a means of improving the well being of people in deprived areas, although to do this, major interventions securing significant changes in circumstances are probably required.

Important new challenges are emerging, perhaps most importantly the long-run decline of retail in secondary centres, which pose difficult challenges, particularly during a period of fiscal constraint.

In such circumstances, it may be better to manage adaption to the new reality rather than seeking to recapture the past.

At the same time, there is – as ever – great uncertainty about the future. Policies need to be robust across the range of most likely futures, but also flexible enough to adapt to changing circumstances.

(Private sector involvement can represent one indication that a scheme is likely to be self-sustaining over the longer term.)

3. Context and rationale

There is no standard definition of “regeneration”, but the definition employed by the Scottish Government captures the common meaning:

“Regeneration is a holistic process of reversing economic, social and physical decay where it has reached a stage when market forces alone will not suffice”².

This of course represents a very ambitious goal.

Although regeneration is described as a holistic process, specific interventions are undertaken and these interventions must have both a sound rationale and evidence of (cost) effectiveness, although there may of course be additional synergistic benefits secured only through undertaking interventions in combination.

In respect of rationale, there are in principle two reasons why “market forces may not suffice” – these reflect the existence of (economic) **market failure** and the need to address **social and environmental objectives** (consistent with the principles of sustainable development).

Market failure is **not** simply the failure of the market to produce an outcome that might be desired (e.g. higher incomes). It is an identifiable and specific

² Government Urban Regeneration Practice: Review of UK Evidence. Scottish Government 2011.

malfunction of a market that may (or may not) be amenable to correction by government action. Such a correction, if effective, would lead to a higher level of economic output than otherwise.

Even where there is no market failure in this sense, Governments of course intervene to secure social and environmental objectives. Indeed, the desire to secure such objectives probably represents the main reason for government action. (Most obviously, governments generally seek to redistribute income or other benefits towards groups deemed deserving, pre-eminently those on low incomes.)

In respect of regeneration, the clearest example of **economic market failure** that could underpin action relates to the property market, where unused and decaying property blights wider areas, creating a spiral of decline. Another important market failure arises through the inability of market systems to provide appropriate transport infrastructure.

In such cases, the underlying rationale suggests that there may be a case for specific interventions by government to correct such failures, but that once corrected, the market system will operate effectively to optimise the level of economic output (though **not**, of course, to distribute it fairly or secure environmental objectives). Such interventions are therefore most likely to be effective where most of the other fundamental requirements for the economic success of an area are in place.

Market failures of these kinds provide a fundamentally sound rationale for policies aimed at “traditional” physical regeneration, though of course specific interventions still need to be justified on a case-by-case basis. And, as explained above, addressing such market failures may do little or nothing to improve prospects for “target” groups including the disadvantaged.

In respect of **social objectives**, action could in principle be aimed **either** at securing better outcomes for those individuals and families deemed disadvantaged, **or** better average outcomes for particular areas (say areas where incomes are low on average). These objectives are of course not identical – an area could achieve better outcomes as a result of a change in its population mix (for example through “gentrification”). In practice, regeneration to meet social objectives is generally intended to improve outcomes for **individuals** through targeting action on an area (or a community, which may not necessarily have a tight spatial definition). In consequence, improved (average) outcomes that result from a change in population mix would not generally be regarded as evidence of success (though it is often difficult in practice to isolate such effects).

The complexity, depth and variety of the problems that regeneration has aimed to address, coupled with their entrenched nature, and the multi-faceted and often small-scale and short-lived nature of the policy interventions, makes evaluation very challenging. In consequence there is little **definitive** evidence on effectiveness (and hence much reliance on expert judgment, most recently about the critical importance of “community involvement”).

In the recent review of evidence undertaken by the Scottish Government, it is concluded:

“The difficulties of evaluating regeneration have been widely discussed and it has been concluded that it is difficult to come to firm conclusions about long-lasting social and economic change as a result of regeneration.....”³

Similarly, a systematic meta-analysis of the impact of UK urban regeneration programmes, which focused on health outcomes but also examined broader effects, concluded:

“There is little evidence of the impact of national urban regeneration investment on socio economic or health outcomes”.⁴

Notwithstanding the inability to draw definitive conclusions, evidence does provide some broad indications as to what regeneration policy could hope to achieve.

First, there is reasonably strong evidence that by far the most important influences on the long run outcomes facing individuals are their own characteristics and their family background (particularly socio-economic status, education and income) rather than where they live. However, there is some evidence that the characteristics of their area and/or community may have a more important influence on children’s outcomes than on those facing adults. These issues are explored in section 4, but in general the evidence suggests that if the objective is to improve the long-term outcomes facing individuals, activities aimed at changing area characteristics are unlikely to achieve major effects.

Second, there is good evidence that the characteristics of an area and/or community can have a major impact on the current well-being of residents (or example, levels of crime and anti-social behaviour are known to be negatively related to well-being). So effective policies in this area could be effective in ameliorating the effects of disadvantage, and could form a strong rationale for intervention on an area basis. This issue is explored in section 5.

Third, there is a strong prima facie case for supposing that area-based interventions could be effective in addressing market failures in the areas of land and property, and transport, and thus improve overall economic outcomes. This issue is explored further in section 6.

4. Impact of area characteristics on long term outcomes facing individuals

³ Government Urban Regeneration Practice: Review of UK Evidence. Scottish Government 2011

⁴ Do urban regeneration programmes improve public health and reduce health inequalities? A synthesis of evidence from UK policy and practice (1980-2004). *Epidemiology of Community Health* 2006:60 108-115.

This section presents key findings drawing on a wider evidence base set out in the Annex.

Deprivation shows a degree of concentration in certain locations, but the concentration is less than commonly assumed. This is true in general for both material and non-material dimensions of well-being. For instance, the Welsh Index of Multiple Deprivation (WIMD) shows that around 50% of income-deprived people (defined as those in receipt of income related benefits) live in the 30% most income deprived areas (but equivalently 50% do not). See Table. (Even in the 5% most deprived areas, more than one half of the population are *not* deprived.)

Table 1: Percentage of benefit claimants by WIMD grouping

	income domain	employment domain
most deprived 10% LSOAs	20	20
most deprived 20% LSOAs	35	35
most deprived 30% LSOAs	49	49
least deprived 10% LSOAs	3	4

From WIMD 2007

The story is similar in respect of most of the other aspects of deprivation, including not only employment, but also non-material dimensions such as health and education. See Table 2.

Table 2: Spatial concentration of ill-health and low educational attainment

percentage of affected population	limiting long term illness	no qualifications
20	13	13
50	38	37
95	90	90

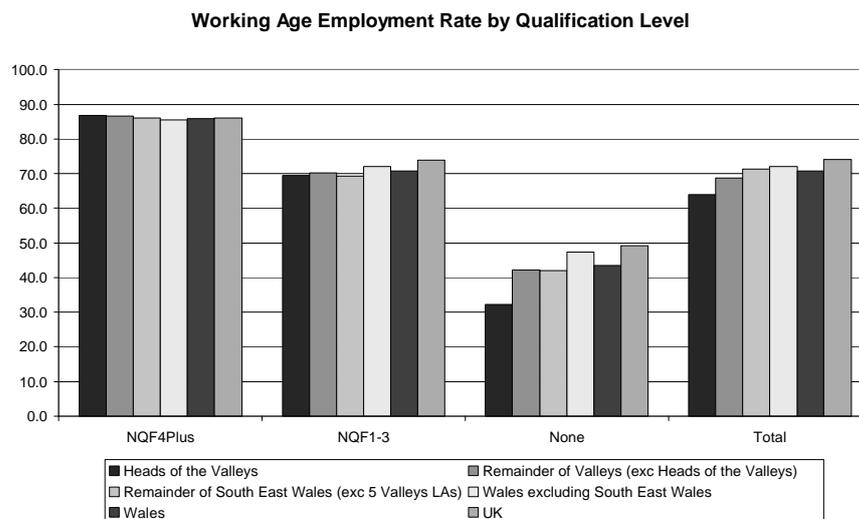
From WIMD 2007

Table 2, using data drawn from WIMD 2007, shows that 20% of those with a limited long term illness live in the 13% of areas with the highest incidence of illness (but therefore 80% do not). The picture is similar for those with no qualifications. These dimensions of deprivation are therefore, if anything, rather *less* spatially concentrated than are low income and lack of employment.

Findings in respect of the labour market can be further illustrated by the data in Chart 1. This chart shows little variation in employment rates by location for those with qualifications (partly as a result of the geographic mobility of those with high qualifications ie they tend to move, or commute, away from areas

where suitable jobs are harder to find)⁵. It also shows that those with no qualifications have low employment rates everywhere, but that in this case there is an extra “penalty” associated with living in particular places. Wider evidence suggests that those with no/low qualifications tend to suffer this extra penalty when they live in areas where there is a concentration of similarly qualified people. This probably reflects the fact that most low skilled jobs are now created in the service sector, generated by the presence of an affluent “customer base”.

Chart 1: Employment rates by qualification and location (pre-recession)⁶



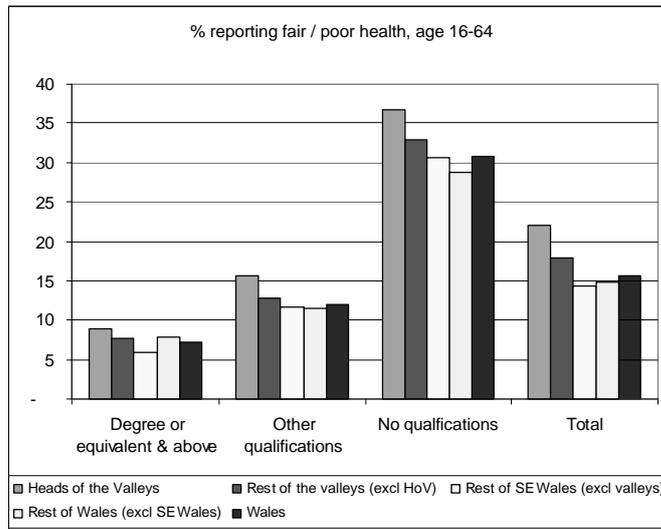
Similar results are found for most other longer-term outcomes, including health, where the poor health found in the Heads of the Valleys, for example, is largely (but not completely) associated with the fact that a high proportion of the population there have other characteristics which are associated with poor health.

In respect of health, simple analysis (which compares rates of self-reported poor health and illness, controlling only for broad qualification levels), shows that, for working age adults, levels of education are more strongly associated with health status than is location (see Chart 2). For those of retirement age the picture is not so clear cut. But as other socio-economic factors apart from education levels (eg income, prior employment status) are likely to influence health, the simple analysis probably *over-estimates* the effect of location

⁵ A related finding with respect to wages data for UK is reported in a recent paper by Gibbons et al. they find that area accounts for only a small part of the variation in wages between individuals, whereas the characteristics of those individuals, particularly their qualifications, is very important. Wage Disparities in Britain: People or Place? Steve Gibbons, Henry G. Overman, Panu Pelkonen, Spatial Economics Research Centre. 2010.

⁶ Data relates to 2007. Since the onset of the recession data shows a high level of volatility and the pre-recessionary position is judged more reflective of the longer run position,

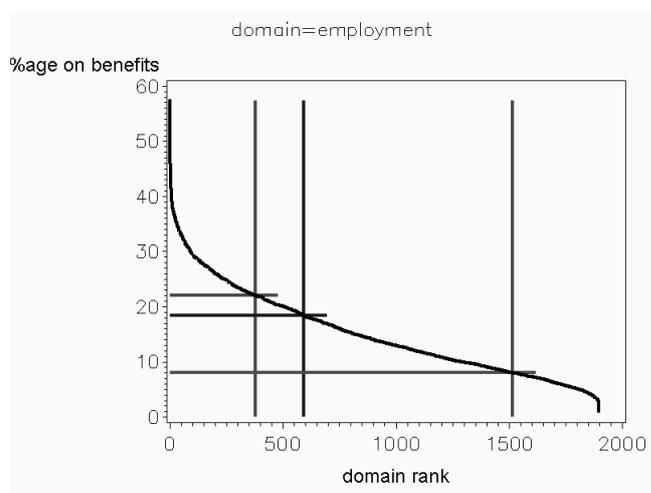
Chart 2: Percentage of working age population reporting fair/poor health



Despite all this, the “quality” of the area remains independently and strongly important for current life satisfaction, and in some studies, for women’s mental health (see section 4).

While a small number of areas do show relatively high concentrations of deprivation (and a small number show low concentrations) for the large majority of areas, differences in the level of deprivation change only gradually, yielding a curve with an elongated “S” shape. Chart 2 shows this result for employment deprivation, which matters not only because employment is a key source of income, but also because employment is directly important for health and well-being.

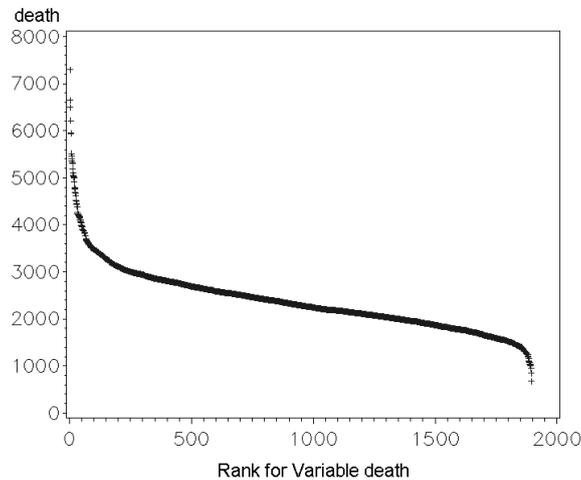
Chart 2: Percentage of benefit claimants by WIMD 2007 grouping (employment domain)



The coloured lines mark: red – the most-deprived 20% of LSOAs (Lower Super Output Areas) ; green – the least deprived 20% of LSOAs; blue – the LSOA rank where half the number of people in receipt of the relevant benefits resides in a more deprived LSOA and half reside in a less deprived LSOA. See text for key points, and Table 1 for key values.

A broadly similar picture emerges for many of the “non-material” dimensions of deprivation, for example health, as proxied by the age-standardised death rate (see Chart 3).

Chart 3: Age-standardised death rate.



Taken in the round, the evidence suggests strongly that the causal processes generating adverse long-term outcomes are, by and large, not geographic in nature – in other words, that people with similar characteristics are likely to have similar outcomes wherever they live.

This picture is supported by a review of research studies which tend to show that in general correlations between areas and adverse long-term outcomes, whether material or non-material, are driven much more by the characteristics of the individuals (and of their families or households) who live in those areas, rather than being a consequence of the area in itself (see Annex). However, the experience of deprivation can be strongly influenced by the characteristics of the area in which deprived people live. Research shows that people are much affected by the characteristics of an area, such as the availability of services, crime, and the general appearance of the physical environment. For people who are unable to move, and/or for those who cannot enter the labour market because of age or disability, improvements to the areas in which they live may be particularly important in increasing well-being.

For children, area seems to play rather more of a role in longer term educational outcomes, although it is still very much secondary to family characteristics, particularly maternal education and to some extent family income. Family behaviours (such as reading to children) appear to be important independently of other family characteristics. The contribution of area in influencing child outcomes may reflect the role of peers and schools in shaping the acquisition of characteristics, particularly cognitive and non-cognitive skills, which become relatively more fixed with age.

In summary, therefore, longer run outcomes, particularly for adults, but also to a large extent for children, are driven primarily by the socio-economic characteristics of individuals and families: geographic location, where it has

an influence, appears to be secondary. Geographic location, however, can matter a lot for the experience of deprivation.

This suggests that improving long-term outcomes for deprived people means addressing the acquisition of these characteristics, of which educational attainment and skills are the clearest markers. And we know from the strong research evidence on the importance of the “early years” that it is typically becomes harder to help children to get back on track the later in life it is attempted, though there are still large gaps in knowledge about what early years interventions work in practice.

The longer run trends (which are common across the developed world) mean that those with low qualifications are likely to face increasing challenges in the labour market, and that inequality is likely to increase, unless a major impact is made through policies that intervene effectively early in life.

The spatial targeting of policies in this area may sometimes be justified on grounds of effective delivery, but if the aim is to improve long-term outcomes, the lack of great geographical concentration means that, with some exceptions, spatial targeting may in fact often be inefficient.

5. Impact of local area on current well-being

As noted in section 4, above, there is a range of evidence that links the characteristics of an area to people’s well being. Some studies have investigated this relationship on the basis of self-reported subjective well being⁷, and in other cases more objective indicators of well-being, such as mental health have been examined. Findings still point to the dominance of individual and family factors, but an influence for area is found, perhaps most significantly for mental health (see Annex), especially amongst women.

The most general findings have probably come from studies that have examined how people’s preferences for area characteristics are expressed in the prices they are prepared to pay for property (the so-called “revealed quality of life”). While all approaches are open to criticism, findings from a recent study of the latter type are broadly representative of the wider field. A recent study by Gibbons et al⁸ found that the key characteristics that influenced the attractiveness of areas included: employment accessibility; climate (especially rainfall); air pollution; (capturing also visual disamenities, eg busy roads); cultural amenities; crime; woodland cover; “hilly” landscape; proximity to the south east of England.

Improving the attractiveness of an area does therefore have the potential, at least, to improve the well-being of residents. By helping to attract and retain

⁷ See for example: On the Use of Subjective Well-Being Data for Environmental Valuation. Susana Ferreira, Mirko Moro. Sterling Discussion Papers in Economics 09/24. 2009

⁸ Real Earnings Disparities in Britain. Stephen Gibbons, Henry Overman, Guilherme Resende Department of Geography and Environment and Spatial Economics Research Centre, London School of Economics. December 2010.

better skilled individuals, it could therefore also place a role in improving the economic performance of the area.

However, in many dimensions, it might be difficult to identify realistic and affordable measures to improve attractiveness. Crime, anti-social behaviour, physical appearance, and accessibility may be among the more tractable features, but the number of robust evaluations appears severely limited (perhaps partly because of the small scale of many of the interventions).

Taken together, this may point to the need for fewer, larger interventions that might make a real difference and which would justify effective monitoring and evaluation.

6. Physical regeneration

Aside from its potential role in helping to improve attractiveness, and thereby well-being, as noted in section 3, physical regeneration retains a compelling economic rationale arising from market failures.

However, conclusive evidence of effectiveness in practice is again quite hard to identify. Addressing market failures should result in a self-sustaining improvement in an area's economic performance, which would be reflected, for example, in an increase in relative land values. The small scale nature of many physical regeneration schemes makes the identification of such effects very challenging, when there are a large range of dominant contextual factors driving outcomes. Evaluations of some very large scale suggest that they have had transformative effects. For example, the evaluation of regeneration in Cardiff Bay, carried out by ESYS for the Welsh Government⁹, concluded:

“Most spectacularly [the regeneration] has created a dynamic residential property market in area once seen as a place to avoid.....Industrial and commercial land values and rental values increased.”

However, the development did not take the form originally intended (with less office and tourist-related development than planned), and as a result lower job creation. Furthermore, but perhaps unsurprisingly in the light of the analysis set out in the sections above, the review judged:

“The limited achievement of socio-economic objectives suggests that while the area has been physically renewed, it has not necessarily been successfully regenerated in economic and social terms....”

However, the report also noted that the regeneration, due to its scale and nature, may well have contributed to a significant improvement in the overall economic performance of Cardiff, and even the wider region, although it was not possible to be definitive about this.

9 Evaluation of Regeneration in Cardiff Bay. Welsh Assembly Government. 2004

Evidence on the impact of transport improvements is also mixed. Recent research carried out for OECD¹⁰ confirms previous findings that while transport infrastructure can play an important role in promoting economic development, it is far from being a panacea. In particular, schemes need to be designed to address effectively real constraints, and if the other elements necessary for growth are not present, transport infrastructure improvements will not be successful.

Although regeneration is normally presented as being aimed at directly benefiting the residents of an area, increasing the attractiveness of an area may also yield important indirect benefits. Attracting and retaining more highly skilled and paid people increases local spending and can generate jobs in the service sector, which is where by far the largest number of jobs are now created for those with lower skill levels. And, of course, attracting and retaining employers could have similar benefits.

A recent summary of evidence on the performance of English cities for the Department of Communities and Local Government¹¹ concluded:

Better housing can attract workers and can indirectly create jobs by attracting employers.

Availability and quality of office space can attract employers, but is only one of a range of important factors.

Crime, visible deprivation and the quality of the public realm all play a role in influencing the location decisions of businesses and individuals.

Good connectivity (both internal and external) can be important both for linking people to employment opportunities and attracting businesses.

There is also some evidence that landmark buildings and structures can generate wider benefits, though such benefits do not always spread far from the structures themselves¹².

In all cases, if action to improve the built environment is to be effective, it must be informed by a sound understanding of the geography of business investment and job creation. This poses particular challenges for areas facing long running decline.

New challenges are also emerging as a result of the decline in retailing in many secondary sectors. While it is difficult to disentangle the effects of the recession, there are signs that we may be experiencing a historic shift that will require innovative solutions to secure the effective re-use of property and land

10 Promoting Growth in All Regions: Lessons from across the OECD. OECD 2011.

11 Updating the Evidence Base on English Cities – Final Report. Department for Communities and Local Government. 2011.

12 The impact of large sporting stadia was examined in: Form or Function? The Impact of New Football Stadia on Property Prices in London Gabriel M. Ahlfeldt, Georgios Kavetsos, July 2011 SERC Paper No DP0087. The wider literature, including in respect of housing, is reviewed in: Valuing Iconic Design: Frank Lloyd Wright Architecture in Oak Park, Illinois Gabriel M. Ahlfeldt, Alexandra Mastro, July 2011 SERC Paper No DP0084.

in order to prevent blight entrenching a downward spiral¹³. In view of the prospective fiscal position, it will be important to explore options that do not involve the use of large sums of public money (perhaps by using the local tax and planning systems to incentivise rapid re-use and/or conversion).

¹³ Comprehensive evidence of the growing difficulties facing town centres was recently assembled for the Portas Review carried out for UK Government. The same research confirmed that there were also major gaps in the evidence, particularly in respect of assessing the effectiveness of policies intended to address those difficulties. Understanding High Street Performance A report prepared by GENECON LLP and Partners. Department for Business, Innovation and Science. December 2011.

Annex

To what extent do deprived people face worse outcomes in some places than in others?

Introduction and summary

As in other countries, most major economic and social problems are much worse in some parts of Wales than in others. The broad facts are well known and not rehearsed in detail here (though a brief snapshot is provided below)¹⁴.

However, this leaves open the question of the extent to which problems are **caused** by factors that have a spatial dimension. It is possible that the spatial concentration of problems is mainly an artefact of the composition of the local population and their particular characteristics, such as skills and qualifications.

Of course, even in the latter case there remains an issue of why certain places attract or retain populations with particular characteristics. If one is concerned with improving outcomes for particular places this is important – but it does not address the drivers of outcomes for the people who currently live there or for the population as a whole.

It is likely that different factors apply over the short and long run. Even if the current concentration of problems is largely a compositional effect reflecting population characteristics, it is possible that over the long run spatial factors shape the acquisition of these characteristics.

The literature contains a wide range of suggestions as to why some causal factors might be intrinsically spatial over either the short or long run. These include:

Variations in natural endowments (such as climate and location).

Variations in “human” endowments (such as the quality of local institutions, culture, and differences in local demand).

“Spillover” effects, whereby individuals or organisations interact creating positive feedback which reinforces particular patterns of behaviour. Spillovers could arise from the “clustering” of firms, from urbanisation more generally, from learning, and from psychological or social processes resulting in role model or peer group effects.

This note briefly reviews the research evidence on the relative importance of the characteristics of people compared with the characteristics of the locations in which they live and work in influencing the outcomes that they face. Much of the evidence comes from outside Wales, though the general conclusions should be broadly applicable to Welsh circumstances.

¹⁴ It should be remembered that on most measures disadvantage is not *all that* concentrated. On the basis of both the employment and income domains of the Welsh Index of Multiple Deprivation, only around 50% of deprived people live in the 30% most deprived areas.

The focus is on the economic outcomes (mainly incomes and employment chances) facing adults, although some consideration is also given to non-economic outcomes and to effects on children.

The focus is on long-lasting and long-term outcomes for residents, not current effects such as impacts on life-satisfaction, well-being and happiness. Such impacts can of course provide an important independent rationale for intervention, and there is good evidence that features such as the appearance of the physical environment, crime and anti-social behaviour matter a great deal in this context.

The stylised story that emerges is that, for adults, the better the study the more of the differences in longer-term outcomes that is explained by individual characteristics. Probably at least one-half of the variation in outcomes in respect of employment and income reflects individual (or household) characteristics¹⁵. There is also evidence of significant agglomeration effects, as people in big cities earn more, or are (with exceptions) more likely to be in employment, than people with similar characteristics in remoter parts. The magnitude of such effects might be about half of that attributable to individual characteristics. The remainder of the total variation, perhaps 10 to 20%, may be attributable to other factors, including specific area effects.

In respect of children, the evidence appears more mixed, but there are grounds for thinking that “local” effects might be important in influencing the characteristics they acquire and therefore their ultimate life chances. It is not clear to what extent these area effects reflect features of the educational system, peer effects, or some other channel of influence.

The studies reviewed consider the affects of area at a range of scales, from regions down to individual streets. The term “area effects” has generally been used when the scale is larger and “neighbourhood effects” when it is smaller, but studies are not entirely consistent in this respect.

Welsh snapshot

Map 1 presents the results for the Welsh Index of Multiple Deprivation. Three observations could be made.

First, the map may fail to give the correct impression of the absolute scale of deprivation in different places, since population density varies significantly across Wales. Cardiff, Swansea and Newport are particularly affected by this.

Second, the degree of concentration of deprivation is generally not that great - see table 1. However, there is a small number of areas, containing perhaps

¹⁵ The proportions of the variance explained by the different sets of factors varies depending on the level of aggregation and the effect of spatial sorting. In respect of the variation in individuals' wages, the better studies suggest that 60-70% is explained by variation in the characteristics of individuals.

5% of the total population, where deprivation is relatively prevalent, with over 50% of the people in such areas being classified as deprived.

Map 1: Overall Index of Multiple Deprivation 2005

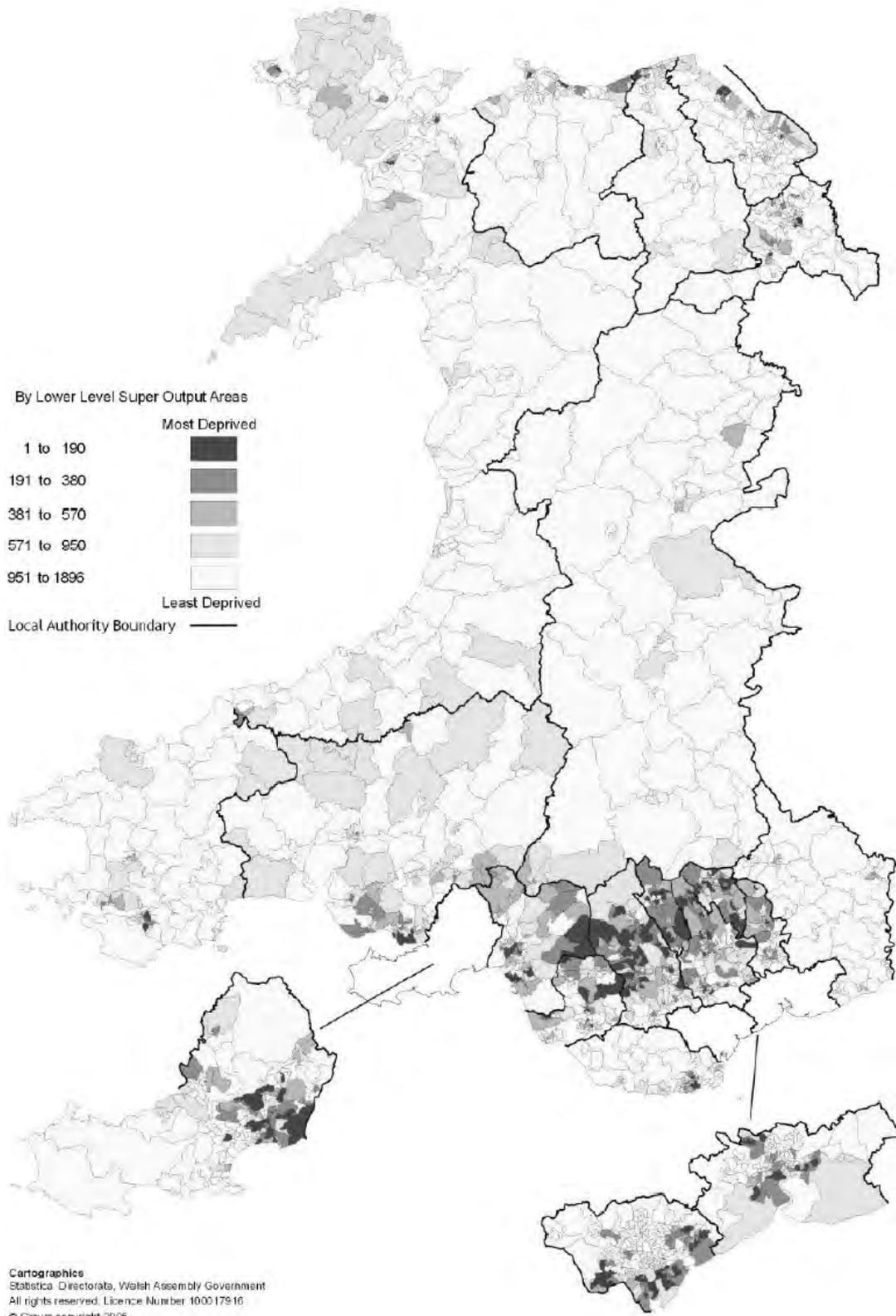


Table 1: Location of deprived people

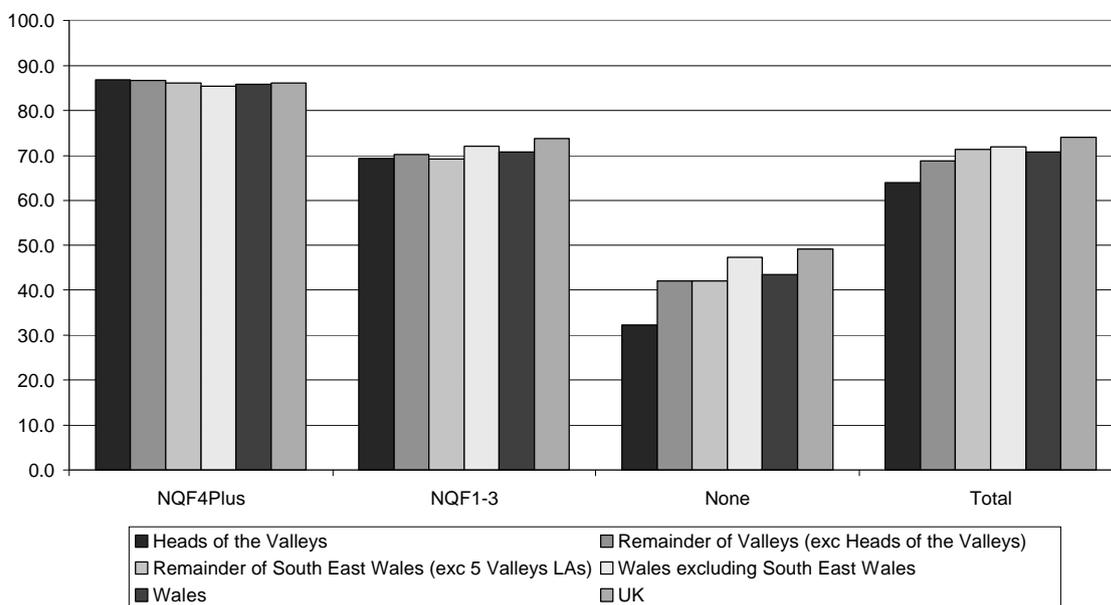
	Income domain	Employment domain
Most deprived 10% areas	23%	19%
Most deprived 20% areas	39%	35%
Most deprived 30% areas	53%	48%
Least deprived 10% areas	2%	4%

Third, while there is a concentration of deprivation in the upper Valleys, there are also many deprived people living in areas that are generally thought to be doing well.

Chart 1 illustrates the importance of individual characteristics in driving economic outcomes. While there is some variation in the propensity to be economically inactive depending on area, this is minor relative to the variation depending on qualification level. Note that if anything this chart probably underplays the role of individual characteristics, since only a crude measure is used.

Chart 1:

Working Age Employment Rate by Qualification Level

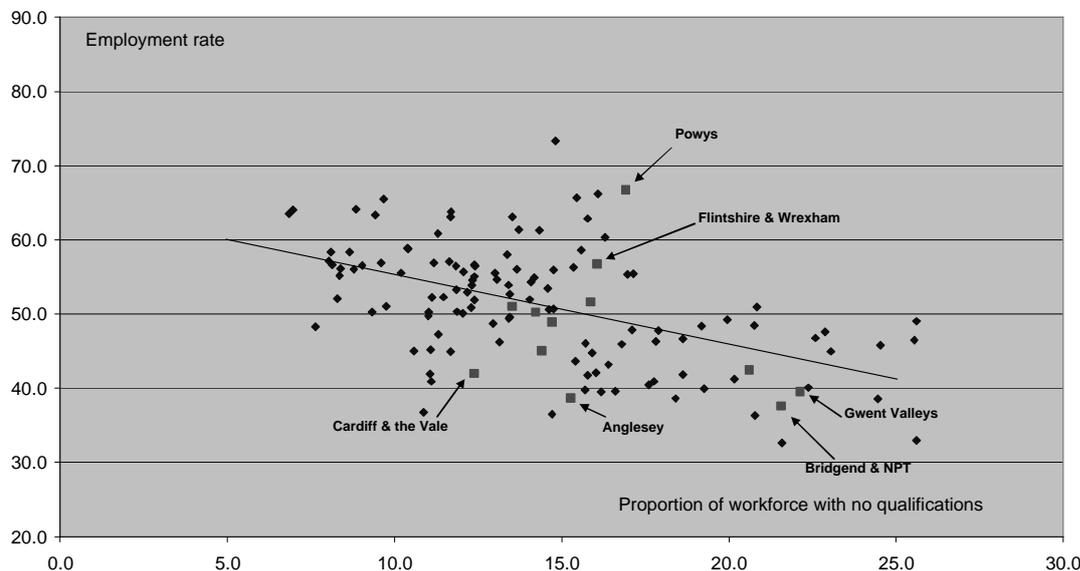


At a more disaggregated level, however, there is some evidence that economic outcomes are also influenced by local labour market conditions, and in particular by the extent to which people reside in an area in which there is a high concentration of people with poor qualifications. This effect may reflect the dependency of many less well-qualified people on jobs created in the service sector. Such job creation often depends on the presence of well-paid (and therefore on average well-qualified) residents.

Chart 2 shows that employment rates for the poorly qualified tend to be lower where there is a high proportion of poorly qualified people in the workforce.

Chart 2:

Employment rates for people with no qualifications, NUTS3 areas 2005



In summary, at least for adults, individual characteristics, particularly qualifications, are crucial for economic outcomes. Area affects look to be secondary at most, albeit with evidence that people in areas with concentrations of low skilled individuals are less likely to be in employment than would otherwise be expected.

The material summarised in this section is suggestive but not definitive. Research is needed to unpick the contribution of different factors to socio-economic outcomes. There has been a wide range of research in this field, and of varying quality. The implications of this research are explored in the remaining sections with the key conclusions included in the summary, above.

Ideal research

Research in this area faces the usual problems of data limitations and of the need to control for unobserved characteristics that influence outcomes.

An “ideal” study would probably take the form of a randomised, controlled trial, in which randomly selected individuals or families were assigned to areas with different features and outcomes monitored over a long period. Such a study would control for many of the unobserved characteristics. However, for both ethical and practical reason, few studies have attempted to follow this route (although a number of US studies have come close – see below).

In view of these difficulties, most research has adopted a statistical approach. The best kind of statistical study would require a large and detailed long-run data set covering the same individuals at different times over a long period, the households within which they live, together and with a hierarchy of contextual data. Because

the data is collected from the same individuals at different points in time, this would both allow the more plausible attribution of causality (because causes should be found to precede effects) and would facilitate control for unobserved factors that affect individuals in the same way across time.

A number of studies have at least approached this standard, but many of them suffer from the relatively small scale of the data sets. An exception is Duranton's study using French data discussed below.

Where panel data is not available, cross-section data (ie looking at how individuals differ at a point in time) can be used to identify associations. In these circumstances, the attribution of causality may be made more plausible by reference to a wider evidence base (for example in respect of associations between skills and incomes).

The statistical modelling techniques themselves vary in complexity from simple regression to sophisticated multi-level modelling methods, such as those pioneered in the educational research literature by Goldstein¹⁶.

Existing literature

An extensive and authoritative survey of the international literature on area and neighbourhood effects is provided by Durlauf (2004)¹⁷. This section highlights key findings. The remaining sections discuss in more detail research that is too recent to have been covered by Durlauf and/or is particularly relevant to circumstances in the UK and Wales.

Durlauf notes the general limitations of research in this area. Even evidence from studies that most closely approximate the randomised controlled trial (so-called "semi-experimental" studies - see below), derived mainly from two programmes in the USA, is problematic and not necessarily generalisable. Attention should therefore be focused on the broad picture, not on the detailed findings of individual studies.

For children, there appears to be agreement that the evidence from the semi-experimental studies shows that moving to better neighbourhoods generally has some positive effects: higher college attendance, better health outcomes and reduced behavioural problems. (However, one piece of recent research has found no long-run effects on labour market outcomes, and another has found little impact on school test scores.)

In respect of adults, the results from semi-experimental studies are more mixed, and a number of studies have reported little impact on adult economic outcomes (although in some cases the time between assignment and survey has been short, and effects might be more likely to emerge over the longer run).

In contrast, the bulk of non-experimental empirical analyses do find some evidence for area and neighbourhood effects on adults. But Durlauf concludes that in most

¹⁶ Goldstein, H.(1995). *Multilevel Statistical Models*. London: Edward Arnold: New York, Wiley.

¹⁷ Durlauf, S. (2004). *Neighbourhood Effects*. Handbook of Urban and Regional Economics, Volume 4, Economics, J. V. Henderson and J.-F. Thisse, eds.

cases this evidence is weak, principally as a result of “selection effects” where individuals with similar characteristics tend to cluster in the same areas.

MacKay (2003)¹⁸ provides a useful summary of relevant UK research. This includes:

Sloggett and Joshi (1994)¹⁹. Area differences in mortality were found to be wholly attributable to the characteristics of the people living in those areas, and not to any neighbourhood effect.

McCulloch and Joshi (2001)²⁰. Examination of test scores of children of National Child Development Survey respondents showed that lower test scores were predominantly the result of family characteristics, though neighbourhood conditions did appear to play a smaller role independent of family conditions.

McCulloch (2001)²¹. Ward-level census based indicators of deprivation were attached to the BHPS to examine their influence on a range of outcomes (including employment status, health and financial expectations). He concluded that “although individual characteristics are very important for the differences in social and economic outcomes observed between people, their geographic setting also has *some significance*” (p 67 – my emphasis). However, once a full range of individual level indicators were introduced, most of the area effects in fact became non-significant (the major exception was “dislike of the area”!)²²

There is also a discussion of UK evidence on neighbourhood effects in Lupton (2003)²³. Lupton focuses on the possible effects of social interactions and on interdependencies between social and physical characteristics, and therefore on processes which tend to operate within smaller physical areas. She notes that most quantitative assessments of neighbourhood effects have found them to be “small”, but argues that such studies have generally operated with crude or arbitrary area definitions, which may have caused an underestimation of effects. She also argues that even if neighbourhood effects are indeed small (or even non-existent) a rationale for area-based policies may still exist – for example, to promote effective delivery where problems are spatially concentrated.

In a review of the evidence on the links between education and economic growth, O’Leary and Sloane (2004)²⁴ note the quite extensive evidence of wage “spillover” effects. Here the wages of less well-qualified workers are raised by the presence of

¹⁸ *Local Area Characteristics and Individual Behaviour*. Stephen Mackay. Social Research Division, Department of Work and Pensions. In-house report 123. 2003

¹⁹ *Higher Mortality in Deprived Areas: Community or Personal Disadvantage?* A Sloggett and H Joshi. *British Medical Journal* 309: 1470-1474. 1994.

²⁰ *Neighbourhood and Family Influences on the Cognitive Ability of Children in the British National Child Development Study*. A McCulloch and H Joshi. *Social Science and Medicine* 53: 579-591. 2001.

²¹ *Ward-level Deprivation and Individual and Social Outcomes in the British Household Panel Study*. *Environment and Planning A* 33:667-684. 2001

²² The study did find some evidence of interaction effects – whereby for men, area deprivation tended to intensify the effects of individual deprivation, whereas the reverse was true for women.

²³ *Neighbourhood Effects: Can We Measure Them and Does it Matter?* Lupton, R, CASE Discussion Paper 73. London School of Economics. 2003

²⁴ *Human Capital and Economic Development*. N O’Leary and PJ Sloane. Welmerc Discussion Paper 2004-07. University of Swansea 2004.

a high proportion of more well-qualified (typically graduate) workers within the firm and/or geographical location. However, much of the underlying evidence is based upon statistical associations in cross-sectional data, and it may be that the analyses have failed to control fully for significant unobserved individual characteristics.

Recent semi-experimental studies.

Under a US government project, deprived families were invited to apply for a randomised housing voucher demonstration known as Moving to Opportunity (MTO). MTO used housing vouchers to encourage families in high-poverty public housing to move to private rental units in low-poverty neighbourhoods. From 1994-97, 4600 households enrolled in MTO in Baltimore, Boston, Chicago, Los Angeles, and New York. Applicants were allocated by lottery to treatment and control groups.

The treatment group therefore consisted of families who were assisted in moving out of some of the most concentrated pockets of poverty. While early studies found some positive results, the better, and more recent studies have been generally disappointing.

One study (Kling et al, 2004²⁵) has found that movement has had no discernible overall effects on employment or income growth for adult members of the families who have moved. (The researchers did, however, sound several notes of caution²⁶.)

Despite the disappointing economic results, the move was associated with better mental (but not physical) health among adults²⁷. A statistically significant reduction in obesity was also found.

A second study examined the effects on the outcomes facing teenage youth (Kling and Liebman, 2004²⁸). The general direction of the effects was that females benefited from programme participation with males seeming to be, if anything, adversely affected.

Among females, the biggest effects were for mental health (major depression, generalised anxiety, and non-specific distress). There was also less risky behaviour (such as use of marijuana, cigarettes, and alcohol) and some better educational outcomes.

²⁵ Kling et al (2004). *Moving to Opportunity and Tranquility: Neighborhood effects on adult economic self-sufficiency and health from a randomized housing voucher experiment*. Jeffrey R. Kling, Jeffrey B. Liebman, Lawrence F. Katz, and Lisa Sanbonmatsu. May 2004

²⁶ First, by some measures, experimental group families moved to declining neighbourhoods, and recent research has emphasised that employment growth rates may be better indicators of job availability than employment levels. Second, the MTO intervention may not have caused enough people to move far enough to experience different local labour market conditions even though poverty rates and the share of employed and middle-class neighbours changed dramatically. Third, neighbourhood effects on employment may exist only for certain subgroups or labour market conditions – for example when labour markets are strong only younger adults may be affected.

²⁷ The researchers believed that the leading hypothesis for the mechanism producing the mental health improvements involved the reduction in stress that occurred when families moved away from dangerous neighbourhoods in which the fear of random violence influenced all aspects of their lives.

²⁸ Kling and Liebman, 2004. *Experimental Analysis of Neighborhood Effects on Youth*. Jeffrey R. Kling and Jeffrey B. Liebman. May 2004.

The average effects for education and mental health were insignificant for males. Males in the treatment groups had *more* physical health problems than in the control group (with especially large effects on injury rates)²⁹.

Panel data studies

Buck (2001)³⁰ used British Household Panel Study (BHPS) data for 1991-1999 and a ward-level deprivation index to examine the relationship between area deprivation and socio-economic outcomes (including indicators of employment status and of income). Buck found that adding in additional individual and household factors reduced the impact of neighbourhood, but the latter remained significant for some outcomes (particularly indicators of flows in and out of disadvantage), although generally quantitatively modest. However, although using the BHPS, Buck did not seek to exploit its longitudinal nature to identify and control for unobserved individual characteristics. It is therefore likely that the effect of area is exaggerated.

Interestingly, the study found little evidence of adverse effects increasing *disproportionately* in more deprived areas (ie “non-linearity”). In fact, the only characteristic to show non-linearity was the probability of poverty exit. There was also only weak evidence of greater social isolation in deprived neighbourhoods.

In another study using the BHPS, Bolster et al³¹ use the first ten waves to examine the effects of neighbourhood on household income trajectories over one, five and ten year windows. By focusing on trajectories, the study abstracts from any individual-level factors (such as skill levels) which are not reflected in the data but which affect levels of income. (This study therefore *does* exploit the panel nature of the BHPS.)

As well as being of interest in its own right, income can serve as a “catch all” for other neighbourhood influences. An individual’s environment may influence their employment, health, marital status, number of children, and so on, and if present these influences are all likely to be reflected in income.

Unsurprisingly, the study finds a strong association between the *level* of income and the disadvantage of the neighbourhood (although this average effect masks a high degree of income heterogeneity within even very small areas). But this is of course consistent either with “poor” neighbourhoods causing low incomes or of people with (independently determined) low incomes living near each other.

²⁹ Regardless of whether the effects of this intervention on males were adverse or negligible, there remained the puzzle of why the female and male results differ. Families with female children and families with male children moved to similar neighbourhoods, suggesting that the differential outcomes by gender are not the result of exposure to different types of environments. Instead, the male and female youth in these families appear to respond to their environments in different ways.

³⁰ *Identifying Neighbourhood Effects on Social Exclusion*. Buck, N. (2001). *Urban Studies*, 38. 2251-2275.

³¹ *Neighbourhoods, Households and Income Dynamics: A semi-parametric investigation of Neighbourhood Effects*. Anne Bolster, Simon Burgess, Ron Johnston, Kelvyn Jones, Carol Propper, and Rebecca Sarker. CMPO Working Paper Series No. 04/106

In respect of changes over time, the study finds no evidence of a negative relationship between neighbourhood of residence in the base period and subsequent income growth. This applies for one-year, five-year and ten-year changes, for almost all population groups, and at different parts of the income growth distribution. If anything, the results show that the distribution of income growth is shifted up somewhat for individuals starting in poorer neighbourhoods. While this could be due to a “rebounding” effect more than offsetting “hidden” neighbourhood disadvantage, on any plausible basis of estimation any negative neighbourhood effect would have to be small.

Social security acts to place a floor under incomes, so it is possible that, for those on the lowest incomes, this has served to prevent relative declines in income that might have otherwise occurred. However, consideration of trends across all income deciles, and of the changes that have taken place in the tax and benefits system over the period in question, do not lend immediate support to the suggestion that different processes are occurring at the bottom of the distribution.

The authors conclude that the results “suggest that the segregation of poor individuals into poor neighbourhoods may not have any substantial long-term detrimental effects” [on adults]. (Bolster et al, 2004, page 25).

In a parallel study using the same data source, Propper et al³² examine the association between neighbourhood and levels and changes in mental health. Overall, they find that the extent of any association between neighbourhood and both levels and changes in mental health is very small.

While there are some sub-groups whose mental health is statistically associated with their neighbourhood composition, any effects are minor. What appears to be important for levels of mental health are the characteristics of individuals and their households, not place. They conclude that “the implications of these results, together with findings from [other] recent UK research.....is that it is people, rather than place, that matter. This suggests the people and their households should be the focus of policy effort to alleviate the common mental disorders examined here” (p 17).

Remaining with non-economic outcomes, Jenkins and Osberg (2003)³³ present evidence, again from the BHPS, indicating (amongst other things) that the likelihood of associational activity for people depends on the percentage of other people that also engage in such activity, both inside and outside the household. In other words, where the level of associational activity of others is higher, individuals are more likely to choose higher levels of such activity for themselves. It is hypothesised that this is because the value of associational activity rises as more people are engaged in it. Since much associational activity depends upon personal contact, this implies that the outcomes for individuals depend upon the level of associational activity in the areas in which they live.

³² *Local Neighbourhood and Mental Health: Evidence from the UK*. Carol Propper, Kelvyn Jones, Anne Bolster, Simon Burgess, Ron Johnston and Rebecca Sarker. CMPO Working Paper No. 04/099.

³³ *Nobody to Play with? The Implications of Leisure Coordination*. Stephen Jenkins and Lars Osberg. ISER Working Paper No 2003-19.

Duranton's important study used a very large panel of French workers (over 2.6 million observations) to examine the factors determining wages across local labour markets³⁴. The study controlled for worker characteristics, worker fixed-effects (ie characteristics of workers, including skills, which do not vary over time), industry fixed-effects, and the characteristics of the local labour market.

Findings suggest that individual skills account for a large fraction of spatial wage disparities, with strong evidence of spatial sorting by skills. Around 70% of the variation in individual wages are explained by worker fixed-effects. This suggests that the productive abilities of workers matter much more than the environment in which they are working.

Differences in the skill composition of the workforce were found to account for 40 to 50% of *average* spatial wage disparities. This results from the tendency of workers to "sort" across locations, and the overall effects are reinforced by a marked propensity for the most productive workers to move to the areas where productivity is already higher because of agglomeration effects. This magnifies true local productivity differences. Not controlling for worker heterogeneity biases estimates of agglomeration economies by up to 100%.

Of secondary importance after skills are true agglomeration (or urbanisation) economies. These benefits seem to arise more from a simple scale effect (measured by local density of employment) than from specialisation in particular industries. In general, non-human endowments (such as natural features, the supply of capital, local institutions and technology) only appear to be of minor significance³⁵.

Gibbons (2002)³⁶ explored a number of different methods for examining the effect of neighbourhoods on final educational attainments using the UK National Child Development Study (NCDS) and the Census. His key finding was that neighbourhoods influence education outcomes, but to a relatively small degree. Gibbons also considered the role of family background and finds that this matters much more.

³⁴ *Spatial Wage Disparities: Sorting Matters!* Pierre-Phillipe Combes, Gilles Duranton, Laurent Gobillon. CEPR Discussion Paper DP4240.

³⁵ Industry fixed-effects are also found to be small, reinforcing the finding in *High Wage Workers and High Wage Firms* John Abowd, Francis Kramarz and David Margolis, *Econometrica* 67(2), 1999. More recent literature has confirmed that individual effects dominate firm effects in explaining the variation in individuals' wages, but suggest that, for some countries at least, spatial variation in wages could nevertheless be mediated through industrial composition effects. This is because firm effects may explain most of the variation in wages between industries, even though not between individuals. See *The Importance of Firms in Wage Determination* Max Gruetter and Rafael Lalive, University of Zurich, September 2004.

³⁶ Gibbons, S., Neighbourhood Effects on Educational Achievement: Evidence from the Census and National Child Development Study, *CEE Discussion Paper*, 18, January 2002.

Patacchini and Zenou (2004)³⁷, also using the NCDS in combination with the Census, found evidence that the (relatively) small direct effects of neighbourhood on educational outcomes may be supplemented by indirect effects. In particular, they found that, for highly-educated parents, the better the quality of the neighbourhood in terms of human capital, the higher the parent's involvement in their children's education. They also found that, for highly educated parents, both parental involvement in education and neighbourhood quality are significantly associated with educational outcomes, the former being more potent than the latter. Low-educated parents do not on average spend much time educating their offspring and it is shown that only the quality of the neighbourhood has a significant impact on their children's educational attainment.

More recent studies, including those for the IFS and drawing on the Millennium Cohort Study³⁸, have tended to confirm this general picture. Maternal characteristics are emerging as of crucial importance, with educational attainment appearing to be at least as important as income. Parental behaviours, for example reading to children, also appear to have an important effect, independently of parent's socio-economic circumstances.

Cross-sectional studies

In general, cross sectional studies suffer from the inability to control fully for individual skills and abilities. They should probably therefore be seen as placing a lower bound on the contribution of individual characteristics to spatial variations in outcomes rather than as providing a central estimate.

The Department for Work and Pensions recently commissioned research (McKay, 2003 – see footnote 3) examining the link between local area characteristics and individual behaviour drawing on the Families and Children Study, which as its name suggests, is a (small) survey of families with children.

Key findings include:

In respect of employment state, the influence of a wide range of individual level characteristics was significant. Some area characteristics appeared significant for those in couples but none at all for lone parents.

In respect of transitions into or out of employment, the influence of individual-level characteristics again appeared to dominate. While local area characteristics were significant in some cases, they followed different patterns for different groups and different transitions, and local area unemployment was not found to be significant.

In respect of the propensity to have income the lowest quintile, a wide range of individual-level characteristics were significant. One area-based characteristic, reflecting average employment levels, was also significant.

In respect of hardship (as proxied by a composite hardship index), the ward level housing score was the only area based statistically significant influence. (And the link with housing probably reflects the high weight given to housing circumstances in the index.)

³⁷ *Intergenerational Education Transmission: Neighbourhood Quality and/or Parent's Involvement*. CEPR Discussion Paper 4744. Eleonora Patacchini, Yves Zenou. November 2004.

³⁸ [References to be added.]

In respect of propensity to be a lone parent, the significant characteristics were mainly individual, though area income and rurality were both significant.

Cross-sectional studies have been used to test for the existence of significant non-linearities in the relationship of area characteristics to outcome variables (ie evidence that outcomes for individuals get *increasingly* worse as area characteristics get worse). Such non-linearities could be regarded as signalling the existence of area effects. The following studies are summarised in Buck (2004)³⁹:

Gordon and Monastiriotis (2004a)⁴⁰ focused on GCSE exam performance, and did find evidence of a significant non-linear effect. However, this was entirely mediated through lone parenthood and its association with absenteeism. In another study⁴¹ the same authors examined whether the greater segregation found in larger cities was associated with worse average outcomes. In fact, the results were the opposite of those hypothesised – higher levels of segregation were actually associated with more students achieving at least “middling” levels of performance.

Gordon and Monastiriotis (2004b)⁴² examined crime, and found (with some exceptions) a general lack of evidence of an accelerating effect of high levels of deprivation on crime.

Gordon and Monastiriotis (2004c)⁴³ considered lone parenthood, with again little evidence of accelerating effects, except perhaps in respect of high male unemployment.

A recent study by Rice and Venables⁴⁴ has examined the contribution of various factors to spatial variations in wages in the UK. The analysis is carried out at the NUTS 3 level, and uses average data on skill levels together with a new indicator of proximity to economic mass in order to capture agglomeration effects. In very broad terms, around one-third of the variation in wages between regions is found to be determined by occupational mix, with the addition of a measure of skills taking the overall contribution of individual-level factors to around one-half of the total. Proximity to economic mass contributes around a further quarter or so to an explanation of the total variance, leaving a relatively small proportion of the total variance as an unexplained residual.

Research undertaken for the Welsh Assembly Government by the University of Wales in 2003⁴⁵ examined the determinants of Wales’s low economic activity rate. Although the study mainly exploited cross-section data from the Labour Force

³⁹ *Does Spatial Concentration of Disadvantage Contribute to Social Exclusion?* Nick Buck and Ian Gordon. In: *City Matters*. Martin Boddy and Michael Parkinson (eds). Policy Press 2004.

⁴⁰ *Spatial Analysis of Neighbourhood Influences on Examination Performance*. I R Gordon and V Monastiriotis. LSE Research Papers in Environmental and Spatial Analysis.

⁴¹ *Urban Size, Spatial Segregation and Educational Outcomes*. I R Gordon and V Monastiriotis. LSE Research Papers in Environmental and Spatial Analysis (forthcoming).

⁴² *Criminal Behaviour and Social Context: The Role of Spatial Effects*. I R Gordon and V Monastiriotis. LSE Research Papers in Environmental and Spatial Analysis (forthcoming).

⁴³ *Using Aggregate Evidence to Test for Neighbourhood Effects on Social Exclusion*. I R Gordon and V Monastiriotis. LSE Research Papers in Environmental and Spatial Analysis (forthcoming).

⁴⁴ *Spatial determinants of productivity: analysis for the regions of Great Britain*. Patricia Rice and Anthony J. Venables. CEPR Discussion Paper 2004.

⁴⁵ *Identifying Barriers to Economic Activity in Wales*. David Blackaby, Melanie Jones, Richard Jones, Paul Latreille, Philip Murphy, Nigel O’Leary and Peter Sloane. University of Wales Swansea, 2003.

Survey, there was also an examination of transitions between employment and inactivity using the BHPS. On the basis of the LFS data, the study found that differences in individuals' characteristics accounted for around half of the "extra" inactivity observed when Wales was compared with GB as a whole⁴⁶. Therefore around one-half was unexplained by such factors, and might therefore be taken as evidence of an area effect. On the other hand, the BHPS data, which controlled for a wider range of characteristics but suffered from a smaller sample size, found little evidence of any significant regional effect on economic activity once all the controls had been included.

The ODPM's Social Exclusion Unit has recently published a report using new data to look at worklessness at a very local (street) level⁴⁷. The report shows that there are high concentrations of worklessness at this level. However, the analysis is largely descriptive and does not seek to address systematically the extent to which such concentrations reflect individual characteristics and "sorting" rather than being the consequences of the characteristics of the areas in question.

Implications

There is a large and diverse literature on the relative importance for various outcomes of the characteristics of individuals, their household, and the places where they live.

For adults, a very general conclusion would be that the effects of location, where they exist, are much less important than the effects of individual characteristics, particularly for economic outcomes. For children, there is rather more evidence of material effects from location, but even here a number of studies suggest that family factors have a considerably greater impact.

It follows that many spatial variations in outcome are likely to reflect differences in the composition of the local population, rather than to result directly from differences in the characteristics of areas. (Of course the composition of population may itself reflect area characteristics, such as housing stock or business structure.)

⁴⁶ Self-reported ill-health was quantitatively much more important than the measures of skills used, but the former may be masking other unobserved characteristics that vary spatially, particularly as the propensity for self-reported ill-health to be associated with inactivity, other things equal, was higher in Wales than elsewhere.

⁴⁷ *Jobs and Enterprise in Deprived Areas*. Social Exclusion Unit Report. ODPM. 2004

CREW Review Evidence: Executive Summary

CREW Evidence to Welsh Government

Review of Regeneration Executive Summary

crew
Regeneration Wales
Adfywio Cymru

Executive Summary

This section summarises the full body of evidence provided in the four Review Papers presented to Welsh Government by CREW.

Evidence presented

This document contributes to the Welsh Government Review of Regeneration by drawing conclusions from an analysis of regeneration practice in the UK and by considering international examples of good practice in different approaches to regeneration. The evidence is presented in a series of related papers available to download from the CREW website and the Regeneration Review website of the Welsh Government. The detailed analysis presented in the series of papers provides an understanding of:

- Paper One: The History of UK Regeneration Policy
- Paper Two: Meanwhile Uses
- Paper Three: Enterprise Facilitation
- Paper Four: High Streets and Town Centres

Paper One: Considers three identified periods of regeneration policy in the UK and tracks the evolution of urban and regeneration policy. The periods considered are

The pre-1968 period

1968 - 1997

1997-present

It also examines the roles of Special Purpose Vehicles employed during these periods.

Pre 1968:

The period before 1968 is effectively characterised by the regional assistance approach which attempted to redress economic under-development and uneven development in the British economy. Responding to spatial difference in economic performance, the policy provided regional assistance largely through the vehicle of the Regional Selective Assistance Programme established in 1932. This approach continued until the early 1980s and remained characteristic of the central approach of the Welsh Development Agency. Continuity with this approach continues in current policies including Economic Renewal: a new direction (WG, 2010) and the newly published Wales Infrastructure Investment Plan (WG, 2012). However, rather than direct assistance to specific companies which would have been the primary methodology in the past, the emphasis has shifted to establishing strongly favourable conditions for specific sectors of the economy to flourish by investing in skills and infrastructure. The importance of a strong economic back-

ground providing jobs and improved GDP and GVA cannot be overemphasised.

Conclusion 1: A background of a strong and diversified economy is a pre-requisite for regeneration and provides the employment which underpins a viable and sustainable society. Sectoral support mechanisms and infrastructural investment must provide the required economic environment for more localised regeneration programmes.

1968-1997:

From the mid-1960s a growing awareness of the partial failure of the welfare state to eradicate social problems led to the emergence of what we would now recognise as the first examples of urban policy. Fuelled by a concern for public order in the inner cities of the UK the first intervention The Urban Aid programme established the principle of spatial targeting of interventions and the now generalised practice of directing additional resources to areas of need.

Conclusion 2: The Urban Aid programme effectively established a continuing consensus that regeneration requires specific budgets focused on deprived communities to alleviate market failure and a cycle of deprivation.

Urban Aid was followed by the Community Development Programme which established 12 area-based projects throughout the UK. Largely criticised for an inadequate funding level and riven by differences of opinion about the causes of poverty the eventual collapse of this programme discredited community-based approaches for nearly two decades.

Conclusion 3: Regeneration policy must be clear and unambiguous in its aims and objectives to avoid dissonance between outcomes required by government and those developed by delivery agencies.

Continued concerns led to the publication of the 1997 White Paper: Policy for the Inner Cities and the subsequent 1978 Inner Urban Area Act which identified key approaches which we would now recognise as standard approaches to regeneration. These included:

- Partnership working between public, private and third sectors
- Spatial targeting of interventions in the poorest localities
- Integrated approaches in health, housing, education and employment

However, following election of a Conservative government in 1979 there was no opportunity to deliver on these objectives and urban policy was radically transformed by the new government's commitment to market-based strategies for the inner city. Rather than poverty-alleviation the new emphasis was on wealth creation, informed by 'trickle-down' theory. Faith was placed in the ability of the private sector to provide employment and wealth creation. However, at the same time, economic restructuring also created high levels of unemployment in the post-industrial communities of the UK and the following decade saw an exponential increase in levels of poverty. Market –orientated policy manifested in numerous attempts to combat market failure in the UK's poorest communities and initiatives included:

- Urban development Corporations
- Enterprise zones. (EZ's)
- Estate Action
- City Grant
- Garden Festivals
- Housing Action Trusts
- Urban Aid continued programme

Growing criticism of the jumble of policies and their increasingly recognised failure led by the late 1980s to challenges to the market-led approach and emerging practice in more successful

areas demonstrated a more pragmatic approach was required, which was not solely informed by political ideology of the free – market.

Conclusion 4: Regeneration policy cannot be driven by ideological beliefs and political values but must be based on sound evidence of what works. Policies should be evidenced-based and continually informed by active review and evaluation.

In particular there was a growing recognition that local authorities and communities had a role in regeneration and the new City Challenge policy in 1991 saw the introduction of a programme based on competitive bidding for resources but which also recognised the need for partnership that was more inclusive of local governance and communities.

Conclusion 5: That comprehensive partnership, involving public, private and third sector organisations, is required for effective delivery.

and

Conclusion 6: That engagement with and involvement of local stakeholders and community organisations brings a dividend in maximising local impact.

This approach was consolidated in the Single Regeneration Budget programme (1994) which stressed the value of :

- Effective delivery partnership
- Private Sector Engagement
- A visible role for the voluntary sector which improved as the programme progressed.
- The application of more permeable boundaries
- The flexibility of approach

The experience of SRB reinforces Conclusions 5&6 and also suggests:

Conclusion 7: That the avoidance of tightly prescribed spatial boundaries can improve programme outcomes

This complex evolution of policy in this period led to a well-defined urban renewal and regeneration framework of core methods and approaches which continued to influence policy development following the election of a Labour government in 1997.

1997-present

With the 1997 Labour election it was clear from manifesto commitments that tackling poverty would be a major component of the new government's programme. Signalled immediately by the creation of the Social Exclusion Unit in the Cabinet office and the commissioning of a wide-ranging series of Policy Action

Team Reports eradicating poverty and social exclusion became a cross-cutting government programme. Consequently, regeneration developed a clear focus on promoting social inclusion in the poorest communities in the UK and developed a holistic approach in recognition of the multi-dimensional patterns of disadvantage experience by poor families and communities.

At the same time the devolution process was assigning these responsibilities to newly elected regional governments in Scotland, Northern Ireland and Wales. Here whilst similar conclusions had been formed and a consensus around the use of Area Based Initiatives (ABI) had been established there developed a degree of policy deviation in the actual mechanisms of delivery and the specific approaches being taken.

Northern Ireland: has developed a programme based on its original Target Social Need Policy and redeveloped from 1997 as New targeting Social need (NewTSN). Rather than a separate funding stream the programme attempted to develop regeneration through the activities of all government departments but subsequent reviews have identified little additional activity promoted by this approach beyond the expected actions of each department. The policy process has also suffered from disruption of delivery by periodic suspension of the assembly and return of responsibility to the Irish Office.

Conclusion 8: The attempts to develop a cross-cutting, inter-departmental delivery of NewTSN has much to commend it as a strategy to break down policy silos. Regrettably, there is a clear conclusion that it has failed in practice and that Departmental programmes have simply assigned already active programmes to the New TSN framework. Little additionality has been achieved and programme bending and mainstreaming has largely failed.

Conclusion 9: Fragmentation of delivery can be significantly damaging to the regeneration agenda. Fragmentation can occur from:

- rapidly changing policy and programmes
- by disrupted bureaucratic and administrative structures
- by developing complex and multi-stranded policies which do not connect
- by maintaining professional divisions and failing to develop cross-sectoral skills

Scotland: Analysis of regeneration policy in Scotland commences with the document Social Justice: a Scotland where everyone matters (Scottish Executive 1999). The policy platform this established combined an approach based on addressing 'people' issues such as poor educational performance and

life-stages based poverty, along with 'place' based approaches to community renewal. A significant connection with housing renewal was made possible by the co-location within Scottish Government of regeneration and housing policy. Since that time Scottish policy has been characterised by constant change and a gradual erosion of community participation. Replacement of the Community Regeneration Fund by the farer Scotland Fund in has been followed by the non-hypothecated allocation of regeneration budgets to the Scottish local authorities. Analysis of policy in Scotland suggests the following conclusions:

Conclusion 10: the early emphasis in Scotland on both 'people' and 'place' based initiatives acting in combination is worthwhile noting and emulating in future policy in Wales. Ensuring physical, urban and housing-led regeneration fully meshes with the wider Welsh Government anti-poverty programme is essential.

Conclusion 11. The common location of the housing and regeneration policy responsibility within, initially Communities Scotland, has ensured strong outcomes for improvement of housing quality in some of the most deprived housing communities.

Conclusion 12. A long-standing history of effective partnerships has ensured that the transition through different pol-

icy developments has ensured continuity of delivery and the bringing forward of learning from past programmes. However, this is felt to be put at risk by locating regeneration budgets within the Local Authority funding regime without the protection of hypothecation. It is not clear that all local authorities have the skills to deliver effective regeneration.

Conclusion 13. A clear monitoring and evaluation policy should be established as a critical element of the design of regeneration programmes. It should include on-going monitoring which informs fine-tuning of programmes during their delivery as well as end of programmes evaluations which are vital to inform future policy design and delivery.

England: From 1997-2009 England experienced the most well-funded and most comprehensively evaluated programme of regeneration experienced in the UK. Alongside the New Deal variants targeting return to work for a wide range of individual circumstance, the labour Government also recognised the need for social and physical interventions in neighbourhoods that had become almost entirely disconnected from the labour market. Within the overall programme of Neighbourhood Renewal the New deal for Communities strategy targeted £2billion over ten years at the 88 most deprived local authorities. NDC

identified initially 17 Pathfinder programmes which were supplemented by a further 22 NDC schemes in 1999. A further £800 million was delivered by the Community renewal Fund, £45 million from the Neighbourhood Management Programme, £35 million from the Community Empowerment Fund and £50 million from the Community Chest programme. There were additional schemes to fund community wardens and local business development.

Key aspects of the programme included strong patterns of community engagement and local governance through the special vehicle of the New Deal partnerships. This local autonomy coupled with effective levels of funding have ensured generally positive evaluations of the programme both at local partnership and national level. The following conclusions are indicated by the experience of regeneration in England during this period:

Conclusion 14. To be effective, regeneration policy must be a key ministerial responsibility and enjoy whole government support alongside clear reporting structures to the office of the First Minister and Cabinet

Conclusion 15. Whilst every effort must be made to maximise the impact of any expenditure, the Welsh Government should take every opportunity to increase budgets available for regeneration. It can achieve this by exploring and

developing innovative approaches to funding, partnership and social procurement.

Conclusion 16. To assist in realising maximum regeneration funding levels Welsh Government should recognise the regeneration potential of all its revenue and capital expenditure to fully develop supply chain and employment opportunities throughout all departments. Adoption of the housing related Can Do Toolkit developed by i2i can assist in this objective.

Conclusion 17. Creation of a specialist delivery body can facilitate partnership, broker relationships and release energy for innovation and action. Distance from government and local government can facilitate decision-making and delivery.

This analysis of policy in the devolved regions has identified a number of implications for the review of regeneration in Wales . One key issue which informs future policy development must be the consideration of the role of Special Purpose Vehicles which has been a key element of all the policies analysed in this review.

Special Purpose Vehicles

Urban Development Corporations: were established within the context of the Conservative Governments of the 1980s and their attachment to private sector solutions to regeneration., Their role was to promote physical regeneration and wealth creation by land use strategies, promotion of industrial and commercial activity and developing housing and social facilities. Performance was measured by ‘hard’ indicators including jobs created, roads built, hectares of reclaimed land, levels of private sector investment and floor areas created in industrial and commercial premises. In practice little expenditure was directed at any social dimensions of regeneration. Particular concern was expressed at the time over their supplanting of local democracy and failure to engage with local communities.

Conclusion 18

Special delivery vehicles similar to UDCs have a potential role to play by providing independence of action and promoting public and private sector partnerships. However, they should be based on clear democratic principles and link either to existing democratic structures or provide alternative routes to community engagement similar to those developed in City Challenge, SRB and exemplified in NDC.

Urban Regeneration Companies: These criticisms informed the development of URCs by the Labour Government from

2000 as an attempt to retain the advantages of arms length delivery of regeneration. Key characteristics are their role as independent companies, their role in coordinating and delivering regeneration, their master-planning role, their leverage of private sector funding. Focusing almost exclusively on physical regeneration in order to attract investment to defined areas. Identified weaknesses have included their lack of planning and land compensation powers, limited levels of funding and lack of overall autonomy.

Conclusion 19

The use of arms length development vehicles such as UDC's and URC's can have benefit for the regeneration process by distancing decision making from government and promoting less risk aversion, faster development times and easier relationships with private sector investors. However, any vehicles developed for these purposes must attend to appropriate levels of democratic accountability and representation of the full range of stakeholders in the regeneration process.

Business Improvement Districts: International and wider UK experience points to the value of this approach which brings the local authority together with the business and commercial community. The latter, following a ballot of at least 505 of local traders, agree to pay an additional rate levy which they are able to

determine how it is spent to improve the business and trading district. Typically associated with larger towns these nevertheless have recognised potential for smaller town centres. Advocates stress the value of achieving a business community which can inform local authority priorities and develop its own social capital. Wales currently has only one operational BIDS at Swansea which with over 800 members is one of the largest in the UK. Based on success to date the Swansea BID achieved a 63% majority vote for extending the BID by a further 5 years.

Conclusion 20

The international evidence as well as local experience in Swansea points to the value of promoting BIDS in Wales and this should form a clear element of any revised regeneration programme.

Enterprise Zones: Enterprise Zones are identified locations where specific incentives are offered to attract new industrial and commercial activity. Essentially similar to the regional assistance approach EZ is an attempt to weight the distribution of economic activity towards areas of poor economic performance. Incentives can include ; access to finance, rates concessions, diverse support packages, International trade advice, help with finding a location, workforce and skills development plus links with industry networks. Academic opinion is divided

about their success. Earlier approaches in the 1980s raised concern about displacement effects as industries were encouraged to move often from existing areas of poor economic performance. More recent approaches developed by Welsh Government have adopted a more strategic approach and link to the promotion of key industrial sectors. Although it is too early to judge the overall effectiveness of these policies this time around, the Welsh Enterprise Zones have received strong cross-party political support and strong support in the media and public opinion. There have also been some early success and job creation in Deeside and St Athan.

Conclusion 21

The current Welsh Enterprise Zones support in general the objectives of regeneration and all opportunities should be taken to engage the regeneration policy with the opportunities that may be represented by Enterprise Zones. However, this should be subject to review to ensure that Enterprise Zones do live-up to the early promise at this stage and do not suffer similar issues of displacement to those experienced in previous applications of this approach.

Part Two: Wider UK and International experience

To supplement the review of UK policy a series of case studies have been conducted by CREW and commissioned from appropriate experts. These consist of:

- A review of meanwhile Uses programme Bristol and New South Wales Australia)
- A review of Sirolli Enterprise facilitation (Blaenau Gwent and Sydney)
- A series of 8 international urban regeneration projects
- This case study material suggests a number of key conclusions that can help inform the review of regeneration.

Meanwhile Uses: Paper Two presents the case studies of ‘meanwhile uses in the UK and Australia. Evidence from the case studies suggests a strong and clear potential for the contributing to the vibrancy and vitality of town centres in Wales by developing a programme of meanwhile uses. However, it should also be noted that the success of the approach leads to more permanent uses of empty premises which can become part of the local economy and provide real employment and commercial and retail activity. Although identified as meanwhile or pop-up programmes the implications for longer-term solutions are also clear.

Conclusion 22

Welsh Government should develop and fund a central programme of support for meanwhile uses that recognizes the potential to revitalise the high street and promote business start-ups.

Conclusion 23

The potential will be most easily achieved through effective partnership between local authorities, Welsh Government and appropriate agencies such as the Arts Council in Wales.

Conclusion 24

Initial work should replicate the legal and planning guidance developed in New South Wales to provide reassurance to landlords and potential tenants of their legal positions.

Enterprise Facilitation: The evidence provided from both the Blaenau Gwent experience and the Auburn, Sydney experience points to the potential to create new businesses in even the most disadvantaged communities. The wider international evidence for the success of the Sirolli approach is clear and this experience suggests significant potential for achieving similar benefits in a greater number of communities in Wales.

Conclusion 25

Enterprise Facilitation initiatives in Wales should be actively supported and funded in future regeneration policy.

Conclusion 26

Linking Enterprise Facilitation to a meanwhile uses strategy could significantly improve the outcomes from both approaches.

The Commissioned Town Centre Case Studies:

Paper 4 presents the evidence drawn from our case studies of high street and town centre interventions. As well as the case studies completed by CREW and presented above we have also commissioned a series of case studies from international experts on various aspects of regeneration. These include a series of 8 case studies on internationally recognised best practice. Various these reflect some of our earlier conclusions and reinforce some of the implications of practice in the UK and beyond that we have identified earlier. In particular evidence from the case studies supports the case for:

- collaboration and partnership (Conclusion 5&6)
- creation of specialist delivery vehicles (Conclusion 17&19)
- The potential role of BIDS (Conclusion 20)
- The value of meanwhile uses for empty high street premises (Conclusion 22,23,24)

Furthermore, the case studies present compelling evidence for

- Retention of area-based approaches
- A clear role for the arts and creative industries
- Diversification of the high street
- The value of releasing the regenerative capacity of public sector land-holdings through LABVs
- The utilisation of sense of place and historical character to ensure that regeneration works with the 'existing grain' of a place
- Residential densification of town and city centres.
-

Conclusion 27: These strategies have been deployed with considerable success internationally and in the UK and whilst no single method can present a fool-proof prescription which will work in all instances, the learning that can be derived from constantly reviewing and understanding best-practice cannot be over-estimated.

The Changing Policy Context

A range of recent reports have suggested a very fluid policy context in which regeneration takes place. This section considers the key implications of current policy development.

Section 1

The Changing Policy Context

In the economic and political climate developing during the financial crisis there has been considerable emphasis on establishing more effective patterns of government expenditure and ensuring high impact delivery of policy and outcomes. This has focused attention on more strategic issues and a number of reports issued in recent weeks have implications for the review of regeneration. The key reports are:

- The Wales Infrastructural Investment Plan (WIIP)
- The Local Growth Zones report
- The City Region Report

WIIP

The WIIP sets out the Welsh Government key infrastructural investment priorities identifying:

- Economic infrastructure: Economic Development, Transport, Environment and Energy
- Social Infrastructure: Housing, Regeneration, Education and Health

These prioritised investment areas link significantly with the regeneration agenda in Wales and the Review of Regeneration can ensure that there is support for the 'cross-cutting' collaboration with the stakeholders identified which include local government, the wider public services, the private sector and the UK government.

Conclusion 28: The Welsh Government Review of Regeneration should explore how the subsequent regeneration policy can support the infrastructural objectives of the WIIP.

Local Growth Zones (LGZ)

The recent Task and Finish Group publication examines the applicability of the concept of Local Growth Zones in the County of Powys. The LGZ approach brings some of the infrastructural investment approaches of the WIIP together with some of the methods employed in Enterprise Zones to encourage business development. The report proposes a multi-stranded framework that identifies communications, transport connectivity, property renewal, planning facilitation, training and innovative funding as

pre-requisites for regeneration in Powys. Significantly, the report identifies ‘niche’ roles for the key towns to ensure a more strategic economic development of the sub-region.

Conclusion 29: The LGZ report for Powys points to approaches to regeneration and economic renewal that could have wider applicability in Wales especially in rural sub-regions. The Review of Regeneration provides an opportunity to further test the value of the identified approach.

The City Region Report

The City Region Report confirms the international evidence for the advantages of City Regions and recommends the formation of two city regions centred on Cardiff and Swansea. The report identifies key drivers of improved strategic planning, improved connectivity and better investment. These all have major resonance with the regeneration agenda and any future regeneration policy should be set within the context of the city regions if they are implemented in the manner recommended by the report.

Recommendation 30: The Review consultation should include a consideration of the implications of the city region for delivering regeneration in the designated city region areas.

In addition to these key reports it is also important that the Regeneration Review fully engages with current consultations and forthcoming legislation in the Sustainability Bill, the Housing White Paper, the Planning White Paper, and the Active Travel Bill.

Spatial Planning

The discussion of the three reports has highlighted an emerging concern with a need to facilitate a spatial planning and investment framework for regeneration and economic growth. This is also a theme consistently returned to by the National Regeneration Panel, which holds a consensus view that Wales requires a ‘tiered’ spatial framework and integrated hierarchy of development to promote joined-up national, regional, sub-regional and local regeneration objectives. A spatial framework would permit the identification of higher level, national regeneration objectives whilst enabling a degree of autonomy for how they are delivered at the local level. It would also prevent competition between towns and regions by developing distinctive patterns of development based on local resources and assets. This suggests a need to revisit and revitalise but more importantly implement a Wales Spatial Plan, which might be better termed a Spatial Planning and Investment Framework.

Recommendation 31: Effective regeneration requires an integrated hierarchical or ‘tiered’ spatial approach that links national, regional, sub-regional and local objectives within a unified planning and investment framework. Revisiting and revitalising the Wales Spatial Plan could achieve this.

Core Regeneration Sectors

Over the last twenty years a number of sectors have emerged as key drivers for regeneration. During the last decade property-led regeneration characterised many urban renewal projects, with large-scale apartment developments providing the financial resources for regeneration areas especially those associated with dockland and waterside locations. Town centres have been more associated with retail-led development with major projects such as the Cardiff St David’s Centre driving the regeneration of the wider area. However, there is now a consensus that both these models cannot function in the current economic climate or indeed are not likely to be viable again in the longer-term. Consequently, attention is focusing on other potential drivers for regeneration.

Housing-Led Regeneration

RSLs in Wales have long been associated with community development activities initially within the context of the Housing Plus agenda. Providing services and support beyond the basic housing function has ensured that regeneration has been a feature of the housing scene in Wales. This has been given considerable impetus by the Stock Transfer process where the ‘offer letter’ to tenants has included clear regeneration promises to improve education, health and employment of residents. LSVTs in Wales are providing exemplar regeneration projects, identified in the Welsh Government Social Research Report (Report No: 20/2012). This focus is in addition to the regenerative effects of the general housing spend (WERU) and specialised investment programmes such as ARBED. The housing sector has also led the way in developing social models of procurement with high levels of community benefit (i2i). More recently, the borrowing capacity of RSLs has been identified as providing a route to a wider and more extensive social role for housing providers. This bears the potential for Housing Associations to work with local and central government to provide facilities for education, health and the wider social infrastructure.

Recommendation 32: The Regeneration Review should examine ways to maximise the potential for housing-led regeneration by developing further the relationship between Welsh Government and the Housing Sector.

Heritage-led regeneration

Attention has also focused recently on the potential of the rich heritage assets evident in Wales. Often driven by local community organisations, development of heritage assets for economic and physical renewal is an important route to town centre development. Understanding and promoting local heritage can provide the unique focus for a town centre renewal and establish the basis for a local and visitor based economy. Developed from effective sense of place studies and linking local assets this approach can provide the uniqueness and distinctive offer that has been so successfully exploited in towns such as Hay-on-Wye and more recently Talgarth. Such initiatives also often become the catalyst for much wider objectives of economic renewal and environmental sustainability.

Recommendation 33: The Regeneration Review should fully explore the potential in Wales for linking regeneration to heritage assets and facilitating local, community energies in their development.

Events-led regeneration

In recent years in Wales there has been a burgeoning of events in a wide range of locations. From music and literature to sport and food-based events there are many examples of attempts to energise local economies by attracting large numbers of visitors on special occasions in the hope that a longer-term visitor econ-

omy materialises. With the Hay Literature Festival and the Brecon Jazz Festival as notable examples these have become large-scale events in the national calendar. At the other end of the scale more localised events have a role to play, for example in Town Centre regeneration, and artisan food and farmers markets have become common place. Consequently, regeneration impacts can be identified with a range of events from the national scale to the local community scale. Maximising the economic and employment impact of events can be an important element of regeneration strategy.

Recommendation 34: The Regeneration Review should invite comment and opinion on the potential for events-led regeneration to contribute to local economic development and place marketing.

Potential Interventions

3

Based on the evidence assembled from the various components of our evidence for the Welsh Government Review of Regeneration we offer key suggestions for interventions which have a good evidence base of effectiveness.

Potential Interventions

The evidence presented in the different elements of this review has led to a number of conclusions that can inform the development of future regeneration policy in Wales. More specifically, they point to a number of essential potential interventions that the Regeneration Review Consultation document should provide as key points for consultation. Specifically we believe that the evidence presented here supports a range of interventions which could significantly contribute to the regeneration of Wales and which can do so even in the context of budgetary constraint.

The emphasis in this listing is on the regeneration of town centres. However, this is in the context of town centres as localised hubs of development for wider catchment areas. It is critical that the wider, integrated approach to regeneration developed in the Regeneration Areas, and particularly in the HOV, is not lost. Regeneration policy must also tackle the housing, skills and health agendas.

We have categorised and described the interventions as follows:

Intervention 1: A positive response to the impact of the economic recession on town centres and seaside towns in terms of vacant property and potential reuse.

- Each local authority sets up a fund (e.g. via Prudential borrowing) to purchase interests in vacant properties in town centres. These will be a combination of freehold and leasehold purchases (over variable timescales e.g. 5 -10 years). Properties will then be offered to local and niche traders at peppercorn or subsidised rents, and coupled with performance level agreements designed to ensure guaranteed opening hours (and days), and to facilitate building improvement works. This could potentially be coupled with a new public sector town improvement grant system. In addition the properties will be ‘traded on’ over time to create a virtuous circle of purchases/disposals.
- Active encouragement of ‘meanwhile’ / potential permanent uses of empty premises on the basis of rent and rates free / subsidy. These can include retail spaces used by arts, community and creative industries groups but should also look to developing uses of empty office spaces as business incubators for emerging and start-up businesses on the same basis. This arrangement could be undertaken with public and private sector property owners.

-
- Strategic land and property acquisition through LABVs; and by community lease and purchase with more effective public sector asset management in favour of supporting town centre and seaside town regeneration
 - Application of the Powys model of bringing into use, long-term empty homes, to empty retail premises, through small loans for property owners to tackle repair and bring buildings into use. This arrangement could be on the basis of a low cost revolving fund programme that recycles loan repayments to ensure continuity of delivery.

Intervention 2: Establishing the basis for enhancing environmental quality and a unique sense of place in town centres and seaside towns:

- New characterisation/sense of place studies designed to specifically encourage community interest and investment, and ‘place loyalty’ in town centres. The studies would be prepared by the local business and social communities as part of a refreshment of existing town centre regeneration strategies or as part of the preparation of new strategies, in each case to be instigated by LAs.

- A new private sector Town Improvement Grant system to specifically operate in town centres to attract private investment by making up the investment shortfall in areas of market failure.
- Funding for feasibility studies of new or refreshed town centre regeneration strategies and improvement initiatives.
- Developing creative solutions to use green energy to deliver town centre regeneration.
- Infrastructural and place based improvement to the trading environment via a new public sector town improvement grant system.

Intervention 3: Housing specific actions that contribute towards improvements and increasing activity in town centre functions.

- Promotion of living accommodation in redundant retail premises in order to change the economic profile of the High Street and introduce residential populations. A variant of this approach could support ‘live/work’ units occupied by artistic, creative industries and crafts based businesses. Potential of Welsh Government assistance by making finance available through additional Housing Grant

to RSL's who are prepared to prioritise town centre housing projects

- The specific provision of housing for the elderly in or adjacent to town centres, thereby improving accessibility of the elderly to a range of services provided within town centres.

Intervention 4: Training and business support

- Training support for local retailers through the National Centre and local Colleges of FE. Designed to promote higher quality retail offer, improved customer services and parallel internet trading
- New business support programmes by WG (or via LA's) for local retailers, including making public sector 'purchasing power' available to subsidise business purchasing.
- The provision of managerial support from WG by providing expert regeneration practitioners, and financial support from WG to provide town centre champions on three to five year contracts.
- Further implementation of Sirolli Institute programmes of Enterprise Facilitation

Intervention 5: Support for innovative organisational and sector based models.

- The promotion of new BIDs in Wales which incorporate support from both occupiers and owners. International evidence for the success of BIDS suggests we need to actively promote and support the approach in Wales
- Support for the development of social enterprises and co-operatives in terms of a wide range of businesses (retail, cultural / craft businesses and creative industries etc.). European best practice has shown that these business models work extremely effectively in the 'independent' sector (e.g. Emilia Romagna, Italy; and Rhone Alpe, France). In this context the encouragement of community uses of town centre premises can lead to the emergence of these types of business model. These models can also access new forms of investment support.
- Full application of social and community procurement practice to all government, local government and public authority expenditure in Wales to promote employment opportunities, skills acquisition and supply chain development.

This set of interventions is provided as a comprehensive listing of potential approaches that could work in Wales. The Welsh Government Review of Regeneration can be used as a mechanism for prioritising from this extensive listing to determine a set of realisable interventions which are aligned with the Programme for Government and current budgetary limits. In any transition to these interventions care should be taken to avoid immediate termination of existing Regeneration Area initiatives, and Welsh Government should facilitate a finalisation of existing commitments in a comprehensive and ordered manner by well ordered exit strategies. Additionally, opportunity should be taken for future policy to build on the best practice that has been established through these existing policy delivery mechanisms.

Additionally, the selected interventions should be complementary to, and have greater integration with, regeneration related policies and activities that are being taken forward by other Ministerial portfolio / WG departments, such as the Enterprise Zone programme; Local Growth Zone proposals, RIFW (Jessica Programme), the Wales Infrastructure Investment Plan, Communities First etc.

CREW Review Evidence: Paper 1

Regeneration in the UK

An analysis of the evolution of
regeneration policy

crew

Regeneration Wales
Adfywio Cymru

Introduction

The following pages explore the evolution of regeneration policy in the UK since 1945.

Regeneration practice in the UK has evolved extensively since the late 1980s. This review will employ a wide ranging definition of regeneration to avoid the academic 'hairsplitting' that has historically characterised attempts to describe that evolution. Historically, practice has ranged from simply defined economic strategies, through physical and urban space initiatives to more complex attempts to socially engineer change in cultural attitudes of the urban poor. The most recent experience in programmes such as New Deal for Communities has attempted to unify these multiple processes within a single programme. This has created a view of regeneration as a broad-based approach to the improvement of the quality of life in identified spatial locations. These have been referred to as 'neighbourhoods' in England and 'communities' in Scotland and Wales. This review will adopt that very broad definition in order to encompass the full range of practice which has informed the evolution of regeneration policy in the UK. This definition of regeneration has been effectively encapsulated in the definition offered by the Department for Communities and Local Government

'Regeneration is a set of activities that reverse economic, social and physical decline in areas where market forces will not do this without support from government' (Authors emphasis). (DCLG, 2008, p6)

The evolution of regeneration can be broadly divided into three periods:

- The pre-1968 period
- 1968 - 1997
- 1997-present

Of these it is the latter period which is of greatest interest to this review. However, some consideration of earlier periods is required to understand the antecedents of most recent practice and the influences that have determined the broad consensus that has emerged around the general value of area-based regeneration programmes which has characterised the post-1997 period. The following sections explore in detail the three identified periods.

The period pre-1968

This section examines the period leading up to 1968.



This period was effectively characterised by the overall Regional Selective Assistance programme which was instigated following the 1930s depression and attempted to redress some of the regional economic imbalances that emerged as a consequence of decline in key industries, including ship-building and coal-mining. This ensured that Wales was a beneficiary, notably with the establishment of the 'trading estates' at Treforest and Bridgend. These attempts to diversify the Welsh economy by promoting light manufacturing and engineering generally failed to replicate the levels of employment lost in the primary industries but have ensured that the economy of the coastal plain in Wales has avoided the worst of the decline experienced deeper in the South Wales Valleys. Perhaps the most notable support for the Welsh economy which came from this programme was the establishment of the Hoover factory at Merthyr Tydfil in 1948.

It was this general economic approach which continued until the mid-1970s and indeed remained the characteristic approach of the Welsh Development Agency and its emphasis on attracting large-scale employment largely through Foreign Direct Investment (FDI). The regenerative capacity of such programmes lay in their ability to provide employment in areas of high unemployment and were further associated with deliberate relocation of key UK government services to areas like Wales, resulting in for example the DVLA office at Swansea, Passport Offices at New-

port and Companies House and Inland Revenue offices at Cardiff.

The long-established consensus on the value of Regional Assistance effectively disappeared with the formation of the Thatcher government in 1979 when budgets were substantially reduced and the concept of regional economic disparity became acceptable within an overall market-driven view of the economy. However, successive Conservative Secretaries of State for Wales were able to resist the monetarist orthodoxy of the UK government and retain considerable elements of 'regional assistance' through initiatives such as Programme for the Valleys which repackaged government funding into specific support programmes for employment in the Valleys region.

Current policy which effectively replicates the functions of Regional Assistance includes Economic Renewal: a new direction (WG, 2010) and the newly published Wales Infrastructure Investment Plan (WG, 2012). However, rather than direct assistance to specific companies which would have been the primary methodology in the past, the emphasis has shifted to establishing strongly favourable conditions for specific sectors of the economy to flourish by investing in skills and infrastructure.

Conclusion 1: A background of a strong and diversified economy is a pre-requisite for regeneration and provides

the employment which underpins a viable and sustainable society. Sectoral support mechanisms and infrastructural investment must provide the required economic environment for more localised regeneration programmes.

The period 1968-1997



This chapter outlines the critical period of regeneration policy development that established many of the core ideas and approaches we identify as regeneration today.

The emergence of modern 'urban policy' is generally recognised to have occurred with a series of landmark reports published in the mid 1960s which identified a range of emerging social problems. The comfortable political consensus of the post-war period was thought to have engineered the good society and abolished the Five Great Wants identified in the Beveridge Report. The welfare state of post-war Britain was believed to provide a safety net 'from the cradle to the grave'. In reality clear social problems existed and were highlighted by popular cultural outputs such as Cathy Come Home (1966) and official enquiries such as the Seebohm Report (1968). Both identified the harsh social conditions experienced by poorer families in the UK and led to the creation of the modern social services. A climate emerged which identified the need for state intervention in critical public services and particularly in the inner city areas of the UK where poverty and emerging racial tensions were felt to pose some threat to the public order. The first conscious government intervention was in the Urban Aid Programme which identified inner city areas where specific additional support would be provided through local authorities. The aim was to 'compensate' for the negative social and economic conditions by improving services and increasing provision. Emphasising education, community and environment the programme increased funding for specific public services in inner city locations. For example higher salaries were paid to teachers in inner city schools in an attempt to attract the best teachers.

Conclusion 2: The Urban Aid programme effectively established a continuing consensus that regeneration requires specific budgets focused on deprived communities to alleviate market failure and a cycle of deprivation

The Urban Aid programme was followed by the Community Development Programme which established 12 localities where community development teams worked with residents to develop community support mechanisms to improve family and community life. One locality was the Llynfi Valley, near Maesteg. The programme foundered on intense disagreement between government and the appointed delivery teams whose assertion that poverty was structural in origin and not personal failure did not accord with the government ideology of the time. The failure of this programme effectively discredited community development approaches for a whole regeneration until the Labour government of 1997 rehabilitated the concept.

Conclusion 3: Regeneration policy must be clear and unambiguous in its aims and objectives to avoid dissonance between outcomes required by government and those developed by delivery agencies.

Following the collapse of the Community Development Programme an urban policy vacuum ensued until the 1977 White Paper: Policy for the Inner Cities which was informed by the in-

tervening Inner Area Studies research programme in major UK inner city areas. Set against the failing economy of the mid-1970s with stag-flation and post oil-shock unemployment, the White Paper identified the structural causes of poverty and inner city market failure and related them to the environmental degradation of the inner city and the emergence of social problems. In many ways the White Paper previewed later debates in the 1980s around the 'new poverty' and its multi-dimensional character and notably was the first policy programme to identify the need to bend public expenditure to areas of critical need. Notably, the White Paper also advocated:

- Partnership working between public, private and third sectors
- Spatial targeting of interventions in the poorest localities
- Integrated approaches in health, housing, education and employment.
- 'Bending' of mainstream funding programmes in favour of the most disadvantaged locations.

Arising from the recommendations of the White Paper, the Inner Urban areas Act of 1978 was created. However, the Labour administration had little opportunity to implement its policies before defeat in the 1979 election.

With the election of the Thatcher Government in 1979, a significant change took place in the state's approach to delivery of urban policy. This was a direct reflection of the market-based policies of the then Conservative Government. As Michael Heseltine argued in 1979:

the Government is committed to take a radical look at the way in which bureaucratic institutions affect our industry and economic performance, we see the need to redefine the frontier between the public and private sector. (Hansard, 13.9.1979 in Imrie and Thomas, 1993, 7).

In retrospect, it is clear, that the wider economic restructuring policies of the Conservative Government were more important than any specific policy approach towards urban decline. A changing economic policy context favoured high interest fiscal policy to promote banking and financial services at the expense of manufacturing. Rising unemployment was regarded as a necessary price to pay for reducing inflation and overall the UK's post-industrial regions were most adversely affected, including of course Wales which saw huge reductions of employment in mining and steel production.

Policy towards inner city and deprived urban areas was conditioned by the wider commitment to 'market-led' solutions but recognised that in areas of market failure some level of interven-

tion was required. This view promoted the identification of the private sector as a stakeholder in the delivery of urban policy as proposed in the Labour 1977 Urban White Paper. This strong market orientation was present in urban policy before its incorporation into other areas of public policy, such as health and social services. This economic/market dominated approach continued throughout the whole period of successive conservative governments from 1979 to 1997. Of particular significance was the Urban Development Corporations as a testing ground for the enterprise/market culture propounded by the Thatcher Government. These will be dealt with in full in the section on Special Purpose Vehicles.

This private sector emphasis prevailed throughout the years of Conservative administration reflecting a broader ideological attachment to 'market-based' solutions. In areas of market failure the approach was centred on trying to promote market activity through private sector engagement. A plethora of initiatives followed including:

- Enterprise zones. (EZ's)
- Estate Action
- City Grant
- Garden Festivals
- Housing Action Trusts
- Urban Aid continued programme

The Urban Aid Programme continued alongside these initiatives but with reduced budgets and greater emphasis on economic rather than social interventions. This increased emphasis on economic expenditure (under the Urban Programme and in the various initiatives indicated above) exemplified the Conservative Government's approach in the 1980's, where it was clear that wealth creation not welfare was the primary goal of urban policy (Parkinson and Evans, in Robinson, 1989,8). This approach was confirmed within the Government's own 1988 policy statement, "Action for Cities", which made no reference to social equity and welfare requirements. Rather its emphasis was on enterprise, self-help, business and environmental improvement. This 'trickle-down' theory assumed that any wealth created by a market-focus would find its way to the poorer sections of society through improved employment opportunities and higher wages. In reality, poverty increased exponentially rising from around 7% in 1969 to 29% in 1989. Commentators identified the 'new poverty' which was regionally and spatially defined by an acceleration of financial economic activity and a decline of manufacturing and industry. This emphasised a North South divide and a new geography of poverty was created in the UK.

Growing criticism of this crisis of poverty emerged from unexpected sources, including the Archbishop of Canterbury's Commission on Urban Priority Areas which in 1985 published the

Faith in the City Report which roundly condemned government policies for the crisis in 'inner city' Britain. By the end of the 1980s more formal criticism of the government's policy effectiveness came from key public agencies. The Audit Commission in 1989 noted "Government support programmes are seen as a patchwork of complexity and idiosyncrasy", and the National Audit Office in 1990, referred to a "complex hotch/potch of urban initiatives" (in Atkinson & Moon, 1994, 96).

Conclusion 4: Regeneration policy cannot be driven by ideological beliefs and political values but must be based on sound evidence of what works. Policies should be evidenced-based and continually informed by active review and evaluation.

Against this background of criticism the wider economic failure of the period and the eventual departure of Margaret Thatcher, a substantial revision of urban policy emerged which, whilst maintaining a role for the private sector, also recognised that local authorities were an essential partner in the regeneration process. The City Challenge programme was launched in 1991 with the aim of transforming specific run down inner city areas and improving the quality of life of local residents. City Challenge ran in 31 deprived urban areas from 1992 to 1998, and represented a significant shift in regeneration policy. The programme introduced a number of new features, such as a com-

prehensive and partnership based approach, which addressed many of the limitations of previous urban policy initiatives. The City Challenge partnerships were invited to compete for a grant of £37.5 million over 5 years. The key characteristics of the City Challenge programme included:

- a fixed level of finance over a limited period
- a partnership-based approach
- no new financial resources were provided with funding based on the top slicing of previous DOE inner city and housing programmes
- competitive bidding was introduced as a means of allocating financial resources
- the involvement of the local community in the regeneration process was promoted
- facilitated a shift from locally determined capital programmes to central government control, and it continued the on-going shift from needs to opportunity / competition based resource allocation.

Numerous commentaries have concluded that City Challenge was a more effective intervention than previous urban policies and a number of its key features have become enshrined as core requirements of regeneration policy. In particular:

Conclusion 5: That comprehensive partnership, involving public, private and third sector organisations, is required for effective delivery.

and

Conclusion 6: That engagement with and involvement of local stakeholders and community organisations brings a dividend in maximising local impact.

The same period saw the establishment of English Partnerships. Intended as a 'roving' UDC, it promoted 'hard side' regeneration for example land-reclamation and development and the provision of strategic infrastructure. English Partnerships continued to operate until 2009 when it merged with the Housing Corporation to form the Homes and Communities Agency. The experience of English Partnerships may offer little to this review given its England only remit. However, it is worth noting that the government's interim evaluation of 1999 was positive with regard to its innovative approaches to delivering regeneration with its application of a full menu of regeneration measures designed to assist the private sector, e.g. providing gap-funding, making loans and guarantees available to the private sector.

More important was the creation of the Single Regeneration Budget Programme in April 1994. It brought together existing funding streams but also established the Challenge Fund based on competitive bidding. It promoted a more regional approach in conjunction with the creation of the Government Offices of the Regions and the later Regional Development Agencies and shifted focus away from relatively localised areas of acute need. The integration of diverse budgets and the promotion of innovative projects was generally well received and the programme was delivered through six successive rounds each building on the experience of the previous round. By the end of the programme the final evaluation was generally positive and reinforces some of the conclusions drawn so far in this review. The evaluation stresses the value of:

- Effective delivery partnership
- Private Sector Engagement
- A visible role for the voluntary sector which improved as the programme progressed.
- The application of permeable boundaries.
- The flexibility of approach

However, there is a general recognition that the SRB programme did not achieve any major 'programme bending' by bringing mainstream budgets more efficiently to problem areas.

This is a general concern throughout the history of regeneration policy in the UK and will be returned to later in this review. The SRB programme points to a number of conclusions which would be wisely reflected in future Welsh regeneration policy including a clear confirmation of Conclusions 5 & 6 presented above. To this we would add:

Conclusion 7: That the avoidance of tightly prescribed spatial boundaries can improve programme outcomes.

The evaluation of SRB emphasised that if sustainable improvements in the well-being of a deprived area were to be achieved then the budgets of all the mainstream service providers would have to be focused on the specific needs of the area for a considerable period of time. There is a need for both more customised policy delivery for deprived areas and more funding for deprived areas relative to other areas. (DCLG 2007, p5)

The period 1968 -1997 saw the development of urban policy to a form that we would now very clearly recognise as regeneration. Although over-driven by a free-market approach the evolution of policy in this period paved the way for the Labour government's ambitious programmes post-1997 and provided a considerable body of evidence which policy development was able to build on. The learning from this period in many ways supports the Labour White Paper of 1977 and provided a very sound ba-

sis for development of regeneration programmes in all the devolved regions after 1997.

Period 1997- the present

This chapter reviews a period in which unprecedented attention was paid to the delivery of area based programmes in all regions of the UK. Basic approaches were shared but actual delivery patterns and structures vary considerably, influenced by the specific perspectives of devolved governments.



With the 1997 Labour election it was clear from manifesto commitments that tackling poverty would be a major component of the new government's programme. Signalled immediately by the creation of the Social Exclusion Unit in the Cabinet office and the commissioning of a wide-ranging series of Policy Action Team Reports eradicating poverty and social exclusion was a cross-cutting government programme. Built on an analysis of social exclusion as a social pattern which emerged from long-term unemployment and concentrations of multiple disadvantage, the government saw integration into the labour-market as the key mechanism for social inclusion and poverty eradication. The New Deal programme was designed to target specific social groups with long-term employment difficulties by creating support and incentive mechanisms to re-join the labour market. However, the approach also recognises that there were locations in the UK where such high concentrations of poverty had accumulated that special measures were required to promote job-readiness in local populations who had been completely distanced from the labour-market for several generations. This was a spatially targeted regeneration programme set within a wide-ranging strategic framework.

At the same time the devolution process was assigning these responsibilities to newly elected regional governments in Scotland, Northern Ireland and Wales. Here whilst similar conclusions had been formed and a consensus around the use of Area Based Ini-

tiatives (ABI) had been established there developed a degree of policy deviation in the actual mechanisms of delivery and the specific approaches being taken. This diversity of policy now offers considerable opportunity to examine what works and what is less successful in regenerating disadvantaged communities. Each devolved policy platform will be examined and conclusions for the current review of regeneration in Wales will be drawn from that significant evidence base.

Northern Ireland

Any analysis of regeneration policy in Northern Ireland is overshadowed by several key factors including the peace process and associated primacy of achieving the peace dividend, the periodic suspension of devolution and the consequent reversion of responsibility to the Northern Ireland Office. This has generated a start/stop/start experience of the regeneration process for all stakeholders in Northern Ireland. The review of policy begins with the New Targeting Social Need (NewTSN) programme introduced in July 1998. This programme succeeded the original Targeting Social Need Programme established in 1991 and was equally concerned to reduce 'community differentials' as well as recognise the broad distribution of poverty in Northern Ireland (NIA, 2001).

The New TSN had the following key objectives:

-
- reducing unemployment and improving employability,
 - addressing general inequalities in health, education and housing
 - tackling social exclusion

The latter objective was supported by an additional policy strand, the Promoting Social Inclusion programme within the New TSN. Administratively, New TSN was supported by a specific New TSN Central Unit in the Assembly and an Inter-Departmental Equalities and Social Need Steering Group was established which included representatives from the Northern Ireland office as well as the Northern Ireland Assembly. The Central Unit eventually became the Central Poverty Unit in the Office of the First Minister and Deputy First Minister (OFMDFM).

New TSN was not a separately funded policy stream but an attempt to co-ordinate actions across all departments of government with each required to produce an annual TSN Action plan which outlined how they would support the TSN objectives in the actions and programmes of the Department. Each plan was reviewed annually and judgements of achievements against the proposed actions were made. The intention was for the programme to influence the policies and spending patterns of all government departments within a general improvement of the

impact of public services on poverty and social exclusion. In general terminology, the initiative was primarily a 'programme bending' approach in which a centrally determined set of objectives were intended to influence the work of all departments and improve impact on key problems underpinning poverty in Northern Ireland. The 2004 Annual Report also added the concept of 'mainstreaming' to describe the process of integrating New TSN 'into the policy and programme development of all departments.' (NIA, 2004, p1).

The 2003 Evaluation of the New TSN identified a number of problems with the approach. Most importantly, it found little evidence of additionality, in that few government departments could point to major actions which 'would not have happened anyway' (OFMDFM, 2003, p101). New TSN also appeared at the time of the evaluation to operate within Departmental boundaries with little evidence of joint approaches to tackling the housing, education and health inequalities. These tended to be focused on by the lead departments but with little crossover into other statutory areas which could support improved equality in these key policy domains. However, individual reports for some Departments pointed to some evidence of skewing of efforts and resources towards the New TSN objectives, although this was in part limited by the relevance of the New TSN programme to the remit of the specific Department.

Many of these limitations were confirmed in the 2004 Review of the New TSN (OFMDFM, 2004) which has prompted the late 2006 launch of the Life Time Opportunities policy platform (OFMDFM, 2007). The policy adopts the UK government targets for halving child poverty by 2010 and its eradication by 2020. The policy identified 8 key areas for actions within a new anti-poverty strategy. With a strong emphasis on a life-stages model of poverty the programme proposed targeting early years intervention with the under 4 year old population, a children and young persons programme for 5-16 year olds, actions for working age adults and for citizens beyond working age. As in the case of New TSN it was a cross departmental initiative which targets:

- Eliminating poverty
- Eliminating social exclusion
- Tackling area based deprivation
- Eliminating poverty from rural areas
- Shared future shared challenges to reduce sectarian divisions.
- Tackling inequality in the labour market
- Tackling Health Inequalities
- Tackling cycles of deprivation
- (OFMDFM, 2006)

Additionally, there was a focus on tackling area based deprivation and the link to and reinforcement of the People and Place

Strategy which was launched in 2003 (DSDNI). Offering a 7-10 year programme of urban regeneration, the Neighbourhood Renewal Strategy outlined a multi-stranded approach to regeneration in the 36 most deprived urban areas. The areas were termed Urban Renewal Areas and were selected using the Noble Index of deprivation and represent the top 10% of deprived neighbourhoods. The policy promoted community, economic, social and physical renewal. Central to the approach is the improvement of public services in the target communities. In government the programme was managed by the Cross-Departmental Group under the leadership of the Minister for Social Development, with representatives from all the other Assembly departments. Key features of the policy include a central role for Neighbourhood Partnerships, supported by a development team where necessary. The Partnership played a lead role in analysing community needs, developing a Vision Statement and formulating Action Plans which take the community forward.

There was also a separate Rural Anti-Poverty and Social Inclusion Framework by the Department of Rural Development. Delivered through a Rural Development Programme the policy promotes business and job growth, and develops projects that 'will enhance the quality of life in local communities and support strong community infrastructures. (DARD 2009, p3). Policy strands include fuel poverty, access to transport and childcare

provision and an anti poverty and social inclusion challenge programme. This programme represents an attempt to tackle the specific features of rural poverty in Northern Ireland and is based on especially commissioned research papers by the Rural Community Network (RCN 2008) and the Rural Development Council (RDC 2008). The policy also proposes a specific programme of community development which recognises the special characteristics of communities and poverty in the rural context.

Implications for Wales

The policies identified above are the core regeneration policies evident in Northern Ireland in the last fifteen years. In addition to these there are a wide range of policies in health, education and housing which may have had impact on poverty. The three Phases of the Peace Programme have also spent considerable sums of money in some of the most deprived areas of Northern Ireland.

In general there are a number of implications for future regeneration policy in Wales and a number of conclusions for the Review of Regeneration Policy can be drawn.

Conclusion 8: The attempts to develop a cross-cutting, inter-departmental delivery of NewTSN has much to commend it as a strategy to break down policy silos. Regretta-

bly, there is a clear conclusion that it has failed in practice and that Departmental programmes have simply assigned already active programmes to the New TSN framework. Little additionality has been achieved and programme bending and mainstreaming has largely failed.

Conclusion 9: Fragmentation of delivery can be significantly damaging to the regeneration agenda Fragmentation can occur from:

- **rapidly changing policy and programmes**
- **by disrupted bureaucratic and administrative structures**
- **by developing complex and multi-stranded policies which do not connect**
- **by maintaining professional divisions and failing to develop cross-sectoral skills (Egan)**

Scotland

Analysis of regeneration policy in Scotland commences with the document Social Justice: a Scotland where everyone matters (Scottish Executive 1999). The document identified a set of targets for achievement by 2020 with strategic milestones which would be achieved in the interim years. The document adopted

a life stages approach to poverty policy which made a clear distinction between 'people and places' It identified key targets associated with children, young people, families, older people and communities. The 'every community matters'(p16) component of the strategy set out objectives to close the unemployment gap, tackle substance misuse, reduce crime, improve housing quality, encourage voluntarism and improve internet access.

Since publication of that document regeneration policy in Scotland has undergone considerable evolution with quite major departures from this starting point. Whilst retaining many of the objectives of Social Justice, the mechanisms for their achievement have changed considerably. The Social Justice agenda was initially delivered through the establishment of the Social Inclusion Partnerships (SIPS). The Social Inclusion Partnership Fund was established in 1998 and implementation of the programme established 48 area-based SIPS with a further 14 'thematic' partnerships, for example, the Edinburgh Youth Social Inclusion Partnership which addressed issues for young people throughout Edinburgh.

Social Inclusion Partnerships were centrally concerned with community engagement both in the area and thematic partnerships (MacPherson et al 2007). Empowerment was a core theme alongside community involvement.

SIPS.... Sought to achieve a more holistic approach; a focus on partnership working and an emphasis on community involvement (Communities Scotland 2004, p2)

Social Inclusion Partnerships were supported by Communities Scotland which was established in 2001 as a Scottish Executive Agency with the key responsibility for housing, homelessness, communities and regeneration. A central role in its support for regeneration was performed by the Scottish Centre for Regeneration which has since been absorbed into the Scottish Executive following the abolition of Communities Scotland in 2008. The role of the Centre was to promote good practice in regeneration, develop learning networks and act as a 'national hub' on regeneration issues. The outputs from the Centre are well-respected throughout the UK and have done much to reinforce the belief that Scotland leads the devolved administrations on regeneration issues.

The document, Better Communities in Scotland. Closing the Gap was published in 2002 (Scottish Executive, 2002a) and signalled the transfer of SIPS into the community planning framework and their integration in 2004 with the Community Planning Partnerships. This also signalled a move away from local project delivery, which it was felt was too specific and localised in its effect, to more strategic interventions which sought to link across disadvantaged areas and connect them to more affluent

areas. This document was followed in 2003 with guidance on the integration of the SIPS with Community Planning Partnerships (Communities Scotland 2003).

The stated intention was to provide a greater community voice in the community planning process and ‘allow decision making on regeneration to be taken at the neighbourhood level within a national framework’ (p3). Each CPP was required to develop a Regeneration Outcome Agreement which linked ‘national and local priorities’. In 2004 the SIPS funding was combined with the Better Neighbourhood Services Fund into the (£318 million) Community Regeneration Fund. The fund supported actions which improved employability, education, health, access to local services and quality of the local environment and linked regeneration to the targets in the Closing the Opportunity Gap (Scottish Executive 2002b) which was the budget statement outlining how the Closing the Gap (Scottish Executive 2002a) priorities would be met.

The Community Regeneration Fund has since been replaced by the Fairer Scotland (FSF) which amalgamated it with a further six funding streams to provide an integrated funding source for community regeneration. Following the creation of a concordat between the Scottish Executive and the local authorities, funding is now provided to local authorities through the vehicle of a Single Outcome Agreement agreed between the Commu-

nity Planning Partnerships and the Scottish executive. The Fairer Scotland Fund merged with the general funding settlement for each local authority in 2010 with the general funding profile agreed in a Single Outcome Agreement which has to demonstrate support for the 15 National Outcomes established by the Scottish executive. These are:

- Business
- Employment Opportunities
- Research and Innovation
- Young people
- Children
- Healthier lives
- Inequalities
- Crime
- Sustainable places
- Communities
- Environment
- National identity
- Environmental impact

Two concerns have emerged amongst practitioners following these changes. Firstly, the new emphasis on the poverty of people rather than place may fail to address the high concentrations of spatially patterned poverty evident in Scotland. Secondly, there are major concerns about the competence of local

authorities in the anti-poverty agenda and whether they will retain sufficient focus on anti-poverty issues within a non-hypothecated budget allocation.

Implications for Wales

This programme of policy evolution in Scotland can offer some clear implications for future regeneration policy in Wales. Many of the social conditions in Scotland are similar to the issues confronting the regeneration agenda in Wales. There are clear spatial concentrations of poverty characterised by long-term unemployment and economic inactivity where populations experience poor health and educational outcomes. Social Housing quality has seen significant improvement but remains the primary location of people experiencing poverty. Small towns experience similar patterns of decline to those in Wales and the issue of rural poverty is as central to Scotland as it is in Wales.

Conclusion 10: the early emphasis in Scotland on both 'people' and 'place' based initiatives acting in combination is worthwhile noting and emulating in future policy in Wales. Ensuring physical, urban and housing-led regeneration fully meshes with the wider Welsh Government anti-poverty programme is essential.

Conclusion 11. The common location of the housing and regeneration policy responsibility within, initially Communities Scotland, has ensured strong outcomes for improvement of housing quality in some of the most deprived housing communities.

Conclusion 12. A long-standing history of effective partnerships has ensured that the transition through different policy developments has ensured continuity of delivery and the bringing forward of learning from past programmes. However, this is felt to be put at risk by locating regeneration budgets within the Local Authority funding regime without the protection of hypothecation. It is not clear that all local authorities have the skills to deliver effective regeneration.

There is a general opinion in Scotland that national level monitoring and evaluation of policy and delivery has been weak with failure to establish well-measured baseline information. There has been a consequent emphasis on more qualitative results which measure 'softer' outcomes. This has been amplified in recent years by rapid changes of policy before success and failure factors have become clear. This can also be said of Wales and future regeneration policy must attend to this deficit.

Conclusion 13. A clear monitoring and evaluation policy should be established as a critical element of the design of regeneration programmes. It should include on-going monitoring which informs fine-tuning of programmes during their delivery as well as end of programmes evaluations which are vital to inform future policy design and delivery.

Where local evaluations have occurred in Scotland there is a general view that, as in other policy examples, there has been a general failure of the twin and related objectives of 'programme bending' and mainstreaming. This was the case in Northern Ireland and is also true of Scotland. This will be specifically examined later in this review.

England

The examination of area-based regeneration policy in England is comparatively straightforward given a degree of stability in the key policy programmes. However, a certain degree of complexity is produced by the multiplicity of funding streams which have supported the regeneration process. The 1997 Labour administration made an early commitment to area-based regeneration (Hoban and Beresford 2001) and the starting point for any account of regeneration policy in England has to be the New Deal for Communities (NDC).

Introduced in 1998 with a projected budget of £2 billion over 10 years the programme started with 17 Pathfinder projects. It was expanded with a further 22 schemes the following year. The New Deal for Communities Partnerships were required to focus on five areas of intervention:

- Housing and environment
- Health
- Education
- Fear and experience of crime
- Reducing worklessness

An approach based in community involvement was required and the pattern of delivery of the programme could be seen as an attempt to partly sidestep local government, which was perceived as by New Labour as one of the factors contributing to social exclusion through poor service delivery. Although the relevant local authority was the Accountable Body in almost all cases, the delivery body was an independent organisation, usually constituted as a Development Trust.

Whilst the first New Deal for Communities Partnerships were being established, the Social Exclusion Unit, newly created in the Cabinet Office by Tony Blair, was identifying the need for a National Strategy for Neighbourhood Renewal (SEU 1998). Emerging from consultation in 2001 as the National Strategy Action

Plan ((SEU 2001). the Strategy set out a vision that ‘within 10-20 years, no-one should be seriously disadvantaged by where they live (p7). NDC was a key element of the strategy and the five key areas of intervention identified in NDC were rolled into the Strategy.

The policy identified the ‘88 most deprived local authority districts’ for support and targeted them with an £800 million Community Renewal Fund supported by an additional £45 million for a Neighbourhood Management programme. Additional support to communities was provided through the Community Empowerment Fund (£35 million) and in a minor grant making programme controlled at the local level, the Community Chest fund (£50 million). This comprehensive policy platform and the associated level of funding signalled an unprecedented faith in the role of communities in the regeneration process as well as the government’s confidence in area-based regeneration. This was in addition to the already clear signals within the New Deal for Communities programme. Additional policy strands also supported the overall structure, including the Neighbourhood Warden fund, Skills and Knowledge Fund and Involving Business fund.

The Strategy was also to be underpinned by robust management and support mechanisms. Oversight was by the Neighbourhood Renewal Unit, chaired by the Deputy Prime Minister,

which reported to a Cabinet committee. This again demonstrated the centrality of this policy to the government’s wider programme. Additionally, Neighbourhood Renewal teams were placed in the regional government offices. The primary delivery mechanism was the Local Strategic Partnership (LSP) operating at local authority level to identify need in neighbourhoods and to prioritise actions. LSPs brought together key local authority departments, health authorities and police authorities together with local communities and the voluntary sector. The policy also introduced the concept of ‘floor targets’, a standard below which no community should be allowed to fall. This attempted to focus spending and priorities within government departments on addressing their poor levels of performance in the most disadvantaged communities.

The Neighbourhood Management Pathfinder programme was also a key element of the Neighbourhood Renewal agenda. The programme commenced in 2001 with 20 Pathfinders with a further 15 added to the programme in 2004. Each Pathfinder is managed by a Neighbourhood Manager with a support team. The delivery vehicle is a multi-agency partnership with local residents represented at partnership level. The partnerships develop a Local Area Agreement which shapes service delivery in the designated Pathfinder area. Essentially, the Programme is a neighbourhood approach to service improvement and places a

high value on community engagement as a means to influence service providers.

This overall policy structure remained relatively stable throughout the period until the demise of the Labour Government although funding for these programmes ended in 2007 before the election and were replaced by the Working Neighbourhoods Fund (WNF) which also incorporates the Department of Work and Pension's Deprived Areas Fund (CLG, DWP 2007). The fund was intended to galvanise 'community actions on worklessness' and to target 'areas of high worklessness by devolving and empowering communities' (p5).

As in Scotland this shift recognised a greater role for Local Authorities who were the recipients of the new Area Based Grant (ABG) in which the general characteristic was non 'ring-fenced' funding.

Implications for Wales

Unlike other devolved administrations there is almost an excess of formal evaluations of principle regeneration policies in England. Monitoring and evaluation of New Deal for Communities has been extensive at the local level and effectively collated to provide a national picture. The 2005 Interim Evaluation (ODPM 2005) painted a generally positive picture of change in several key domains of the programme including community engage-

ment, engaging with agencies and environment, with notable progress on crime and fear of crime. However, there was only minor or no change in relation to health, education and employment. This was confirmed in the Final Programme Evaluation.

A significant body of learning is available from this English experience which has been sustained for over ten years and has been well-funded and centrally supported in Government. The ability to fully review the programme and effectively assess its impact, both locally and nationally, is a huge advantage and fully reinforces Conclusion 13 about the need for robust monitoring and evaluation.

Perhaps of equal importance in England was the 'whole government' commitment to social inclusion and the central drive provided to regeneration by its location in the Office of the Deputy Prime minister (ODPM). Reporting routes through a Cabinet Committee also ensured inter- and cross departmental support.

Conclusion 14. To be effective, regeneration policy must be a key ministerial responsibility and enjoy whole government support alongside clear reporting structures to the office of the First Minister and Cabinet

The extent of expenditure on the overall Strategy For Neighbourhood Renewal and all its associated spending streams has

not been replicated in other administrations and it is unlikely such sustained high levels of expenditure will be repeated even after the resolution of the current financial crisis. However, the levels of funding were sufficient to instigate both physical and social change and significantly alter the character of 'place' and the experience of 'people'. This combination is essential for the achievement of effective regeneration. Whilst every effort must be made to maximise the impact of even limited expenditure it is the case that regeneration cannot be achieved without major expenditure. Funding can be drawn from all partners in the regeneration process but will always be heavily dependent on state and private sector expenditure.

Conclusion 15. Whilst every effort must be made to maximise the impact of any expenditure, the Welsh Government should take every opportunity to increase budgets available for regeneration. It can achieve this by exploring and developing innovative approaches to funding, partnership and social procurement.

Conclusion 16. To assist in realising maximum regeneration funding levels Welsh Government should recognise the regeneration potential of all its revenue and capital expenditure to fully develop supply chain and employment opportunities throughout all departments. Adoption of the

housing related Can Do Toolkit developed by i2i can assist in this objective.

In the New Deal for Communities Partnership it was recognised that multi-agency working was a requirement for successful delivery. By creating a specialist delivery body it was able to bring multiple public sector partners into close liaison with community members. The availability of significant budgets was persuasive and ensured meaningful dialogue and an ability to instigate actions. It is likely that these factors contributed to the higher levels of programme bending and mainstreaming which occurred in England.

Conclusion 17. Creation of a specialist delivery body can facilitate partnership, broker relationships and release energy for innovation and action. Distance from government and local government can facilitate decision making and delivery.

Special Purpose Vehicles



Throughout the periods examined there has been a range of organizational and governance arrangements to facilitate the regeneration of target areas. We discuss the key approaches in the following section.

Conclusion 17 points to the value of developing specific regeneration vehicles to deliver programmes at the local level. Whilst setting of overall objectives should be at national level, the specific means of achieving them are usually best determined in the context of local partnerships. The experience of City Challenge, SRB, and New Deal for Communities all point to the value of independence at the local level. Throughout the history of UK regeneration described here a variety of special purpose vehicles have emerged to deliver government objectives. Several of these will be considered in this section.

The Urban Development Corporations

The Urban Development Corporations (UDC's) were set up under the Local Government Planning and Land Act 1980, to regenerate designated areas of industrial and economic decline (NAO, 1993,6). The remit of the Urban Development Corporations was to secure the regeneration of their designated areas via primarily an economic and physical approach. They did this by bringing land and buildings back into effective use, encouraging the development of existing and new industry and commerce, creating an attractive environment, and ensuring that housing and social facilities were available to encourage people to live and work in the area (DETR, 1998, 2). The particular fea-

ture of the operation of the UDC's, was their commitment and single mindedness to the regeneration of spatially discrete areas which required the removal of local democracy. Hence the approach taken was, "central government imposing a deregulatory statutory on local areas through financial and legal means and via strategic political appointments to decision-making bodies" (Newman and Thornley, 1996, 125). The UDC's emphasis was on economic and environmental improvement with a very minor emphasis on social/community initiatives. In this respect financial expenditure on these initiatives was low. For example, with regard to the second and third generation Urban Development Corporations, expenditure on social community and training schemes ranged from just 0.1 % to 2.3% of an individual Corporation's expenditure (NAO, 1993, 2). Rather, the UDC's relied on the now discredited concept of "trickle-down" with the assumption that economic and physical/environmental improvement would over the long term, facilitate social and community regeneration. The UDCs' hard output/bottom line accountancy dominated approach was reflected in the output indicators, which relied on such measures as jobs created, length of roads built or improved, hectares of land reclaimed, amount of new commercial floor space built, private sector investment levered, the quantity of new housing units produced (DETR, 1998, 1).

Criticism by academic commentators of the UDC's approach and performance has been almost universal, but focuses on

their promotion of "flagship projects", and the pursuit of property-led regeneration (Lawless, Imrie and Thomas and Thornley in Bailey, 1995,52). Taking the Cardiff Bay Development Corporation as an example, a flavour of the concerns expressed can be understood via commentary by Thomas (1989, 37), when with regard to the evaluation of the project, he questions the opportunity cost of public investment and the displacement of problems from one area to another created by the spatial targeting of the regeneration initiative.

These points reflect a general criticism that could be made of all of the UDC's, but equally they represent a microcosm of a much wider problem associated with urban regeneration initiatives.

Commentators have been particularly strident in their criticism of UDC's on this issue, noting that, "islands of renewal in seas of decay" have been created (Shaw and Robinson, 1998, 55). Wilkinson (in Shaw and Robinson 1998, 55) expounds this issue further in relation to regeneration developments in Newcastle undertaken in the 1980's, where he describes, " Isolated growth nodes within larger areas of decay, often dislocated in spatial and temporal terms from the localities which surround them..... it is an approach concerned with super imposing fragments on the city rather than with the comprehensive planning of urban areas". The emphasis on "place marketing" (Stewart, 1996, 23) via the production of glossy promotional brochures,

rather than undertaking a comprehensive, strategic and planned approach to regeneration initiatives was a particular feature of the UDCs' and reflects in Solesbury's words (1987,21), "the general shift, from planning to opportunism as an appropriate management style for attacking urban problems", which took place in the 1980's.

Particular criticisms have been levelled at Cardiff Bay Development Corporation (Hambleton & Thomas, 1995, 130 and 135) and other UDC's, with regard to their lack of democratic accountability. The membership of the Boards of the UDC's were dominated by the business sector and local authorities, and local communities usually had little influence over their decisions. Furthermore, as central government appointed the Boards, there was a centralised control over the process of economic structuring which the UDC's were expected to undertake. This is significant, because any perceived lack of democratic endorsement of regeneration initiatives can hamper its effectiveness. Urban Development Corporations consumed public sector expenditure at the expense of traditional Urban Programme expenditure. A general criticism that was warranted, and particularly so with regard to the London Docklands Development Corporation. This funding approach directly reflected the Conservative Government's approach to economic and social restructuring, and its electoral bias to the south east of England,

which serves to emphasise again the politically driven nature of urban regeneration initiatives.

Conclusion 18

Special delivery vehicles similar to UDCs have a potential role to play by providing independence of action and promoting public and private sector partnerships. However, they should be based on clear democratic principles and link either to existing democratic structures or provide alternative routes to community engagement similar to those developed in City Challenge, SRB and exemplified in NDC.

Urban Regeneration Companies.

The creation of URC's as special purpose regeneration vehicles was first mooted in 1999 via the Lord Rogers/DETR Report, 'Towards an Urban Renaissance' (1999, p 147). The Labour Government's White Paper of 2000 (ps 62 and 63) endorsed the Report's suggestions and drew attention to the creation of three URC's, Liverpool Vision (the country's first Urban Regeneration Company), New East Manchester and Sheffield One.

URC's were a Labour Government response to the perceived criticisms of Urban Development Corporations (UDC's). This centred on criticisms concerning the UDC's lack of democratic accountability and suggested abuse of their discrete planning

and compensation powers. There were also concerns about the marginalisation of local authorities in the regeneration process. (Imrie and Thomas, 1993).

Hence, in 1997 the new Labour Government moved quickly to develop a new delivery vehicle which answered these complaints and criticisms but at the same time provided the sort of special purpose delivery agencies which are needed to undertake regeneration with a degree of autonomy and at speed. Ironically, the last Labour Government in its latter years created new UDC's, in part in response to a growing awareness that URCs lacked the autonomy and financial independence to undertake regeneration projects where particularly large scale needs and opportunities exist (e.g. see the creation of a URC for Thurrock Thames Gateway with the grant of planning powers, Regeneration and Renewal 30.9. 2005).

The role and character of URCs has principally been as follows:

- They are Independent companies, limited by guarantee. Their members have comprised local authorities, RDA's (now abolished from 2011/12) and English Partnerships (now the HCA). When the URC was set up in Newport in Wales in 2002/03 the three principal partners were Welsh Government, the Welsh Development Agency and New-

port City Council. The partnership now comprises WG and NCC, following the demise of the WDA in 2006).

- They fulfil a coordinating role to deliver economic regeneration but do not have statutory powers or hold assets.
- Their primary role is to address significant development opportunities by developing and managing implementation of a master plan. They also build business confidence and realise a collective vision for the future of the area.

Jones and Evans(2008,18) provide a succinct commentary on the role of the URCs as follows:

‘The idea is that the URC should set out a masterplan for the regeneration of a specific area. Public sector partners can then use this to prioritise the redevelopment of key infrastructure. This, in turn, can attract private capital to realise the rest of the plan. URCs themselves do not have significant resources simply acting to bring the other agents together with a clear focus on physical redevelopment rather than community renewal’.

The key features of URC’s are:

- Formal partnerships.
- An aspiration to be independent and operate at arms length.
- Strong planning lead regeneration.
- Rely on the funding and powers of its parent organisations and hence can suffer from a lack of organisational autonomy.

The primary focus of the URC’s has been on realising physical development opportunities in order to attract investment in to the designated areas and have not generally addressed social and economic factors. Consequently it has represented a less than holistic approach to regeneration.

It is also important to note that URCs unlike UDC’s have not possessed planning and land compensation powers. However, it is inevitable that any regeneration initiative will have to facilitate a spatial re-arrangement of land uses, and therefore possessing these powers or having access to these powers via their member partners is vital.

Implications for Wales

Wales has only one example of an URC in Newport Unlimited established originally as a partnership between Welsh Government, Newport City Council and The Welsh Development Agency. Established in 2003 in the face of major job losses at Llanwern and Ebbw Vale, the URC has been charged with re-development of the city centre and the promotion of regeneration sites at Llanwern and in the West Newport area..

An independent interim evaluation of Newport Unlimited by the consultants AECOM concluded in 2010 that Newport unlimited had performed relatively well compared to English Urban Regeneration Companies (URCs). After considering the volume of pre-development work such as site preparation and remediation, the scale of Newport's outputs is relatively high. Broadly speaking the top performing URCs fall into two broad groups; the high achievers - Liverpool Vision, New East Manchester and Clyde Waterfront. These URCs have had considerably higher funding than the rest and have been in business longer although some have now completed their operations and have been wound up. Many have delivered significant volumes of new floor space and have demonstrated a mixed performance against the required output criteria. Taking the output targets as a whole Newport comes in 6th out of the top 15 URCs, despite being a younger initiative and having received significantly less funding than the other top URCs.

One highly significant result of AECOM's report was that a decision was taken to concentrate the investment work of the URC in to six key City centre Districts or ' , i.e. Newport Gateway, Market Quarter, Retail Quarter, Clarence Place, Riverside Quarter and an Arts and Creative Quarter.

Hence, it could be argued that a best practice approach to regeneration has been adopted by targeting limited financial resources at discrete spatial locations within a coherent themed approach. The URC has identified individual regeneration projects and initiative some of which have already been completed including the Newport University campus building, the Central Railway Station, the Market Hall. Although the largest of the flag-ship regeneration projects, the Friars Walk retail scheme has yet to be delivered. However, against the background of the wider financial crisis and the critical challenge of attracting private sector investment the projects delivered to date represent considerable achievements.

Conclusion 19

The use of arms length development vehicles such as UDC's and URC's can have benefit for the regeneration process by distancing decision making from government and promoting less risk aversion, faster development times and easier relationships with private sector inves-

tors. However, any vehicles developed for these purposes must attend to appropriate levels of democratic accountability and representation of the full range of stakeholders in the regeneration process.

Business Improvement Districts

A Business Improvement District (BID) is a business-led and business funded body formed to improve a defined commercial area. A BID is basically a partnership arrangement between local authorities and the local business community in order to implement area-specific schemes, which will benefit the local business community, with the agreement of business ratepayers. Ratepayers will agree to pay an additional levy on their rate bill to finance a BID. The ratepayers themselves will be able to decide in advance on the way in which their money is spent and how much they are prepared to pay in addition to their rates bill. All ratepayers who are asked to contribute to a BID are eligible to vote on whether a BID is taken forward. BIDs are only taken forward if there is above a 50% approval rating from local ratepayers and this has to include a majority in terms of their aggregate rateable value.

BIDs are not limited to any particular spatial level. A BID can be established in any place where additional services to those which the Local Authority provides, are desired by the local business community. Although traditionally BIDs are found in cities,

towns or districts BIDs can be as small as one to two streets or significantly larger. The BID is a concept borrowed from America, where it has enjoyed prolonged periods of success in benefiting local areas, residents and businesses. However, BIDs are a relatively new proposition in Wales with powers to set up Business Improvement Districts being granted to Wales in the Local Government Act 2003. Whilst there has been a large take up of the BID model throughout the U.K, there remains only one BID in Wales, The Swansea BID.

Swansea BID is the only BID in Wales. The BID allows 800+ businesses in the City Centre to identify key issues that impact on their trading and start projects to tackle them. The BID is delivered through Swansea Business Improvements District Ltd, which is a not-for-profit organisation, limited by guarantee. It has a board of directors elected from the BID area, who pay the BID levy themselves. Swansea BID was voted in by business in the City Centre of Swansea in 2006 to develop and deliver improvements on the following core objectives - Transport and Access, Supporting and Attracting business, Raising the Profile, Brightening the City Centre, and Safe and Secure. Between 2006 and 2011, the Swansea BID has delivered the following (<http://www.swanseacitycentre.com/index.cfm?articleid=6968>, March 2011)

- Reduced violent crime & disorder by 68%
- Reduced retail crime by 12%
- Won a national City Centre cleansing award making Swansea City Centre cleanest City Centre in the Country.
- Brought in over 150,000 people into the City Centre through events such as Swansea Live, Get Welsh etc.
- Instrumental in making Swansea the safest University City in the Country = Increasing student recruitment = Increasing business for our members
- Brought in over 100,000 vehicles into the City Centre through car parking initiatives.
- Brought in an extra 3m pounds into City Centre businesses based on an average retail spend of £12 per person.
- Reduced member's costs by over £5,000 per year/ £25,000 over BID term if all BID Member Benefits are taken.

The Swansea BID recently achieved a successful renewal ballot with a 63% majority of City Centre businesses voting YES to keep the BID for a further 5 years until 2016. With the apparent success in terms of results and popular opinion of the Swansea Bid, and other BID's around the U.K, it would be desirable to promote BIDS considerably further in Wales.

Conclusion 20

The international evidence as well as local experience in Swansea points to the value of promoting BIDS in Wales and this should form a clear element of any revised regeneration programme.

Enterprise Zones

Enterprise Zones are designated areas where specific incentives are offered to attract new businesses and industry to a specific location. The Welsh Government are offering an impressive incentives package to encourage business to Welsh Enterprise Zones including; access to finance, diverse support packages, International trade advice, help with finding a location, workforce and skills development plus links with industry networks. The introduction of Enterprise Zones in Wales, in April 2012, was designed to strengthen the competitiveness of the Welsh economy, and demonstrate Welsh Government's continued commitment to creating jobs and sustainable growth. However, it could be argued that their introduction in Wales was a direct response to their introduction in England, one year previous, amid fears that those in England may attract business and enterprise away from Wales. The Welsh government have been keen to stress that they are using Enterprise Zones model to construct a tailor-made Welsh solution to attracting new business to Wales, and not simply replicating the English approach.

The Welsh Government has opted to take a bespoke approach in each location; with each zone focused on a key target sector. According to the Welsh Government, sectors are a crucial part of Economic Renewal, the new direction that sets the role devolved government can play in providing the best conditions and framework to enable your company to grow and flourish. There are seven confirmed locations:

- Cardiff - focusing on Financial and Professional Services sector
- Anglesey - focusing on the energy sector
- Deeside - focusing on the advanced manufacturing sector
- St Athan - Cardiff Airport Enterprise Zone - focusing on the aerospace sector
- Ebbw Vale - focusing on the advanced manufacturing sector
- Snowdonia- focusing on the Energy and Environment and ICT sectors
- Haven Waterway-focusing on the Energy and Environment sector

Regional policies of this type, in their previous guise as Development Areas, have been periodically prominent in British policy making since 1945. Similar incentives were introduced to promote the spread of business throughout the country and away from the already flourishing South-East England. Although theo-

retically sound ideas, these incentives were rarely great enough to overcome the comparative advantages of locating near the core, as they failed to address the underlying issues of economic of scale and economies of agglomeration. Consequentially, Development Areas often failed to promote the spread of industry and resulted in significant wastes of taxpayers' money. Indeed, Wales' has had to bear the embarrassment of some high profile failures, such as the LG factory in the 1990s. However, there is renewed optimism this time around. The scattergun approach of the 1980s is gone, and has been replaced by The Welsh Government's approach of targeted Zones focussing on an area's natural comparative advantage and established industry. Significant forethought and planning has gone into determining the location and focus of each zone in an attempt to improve on our past efforts. Although it is too early to judge the overall effectiveness of these policies this time around, the Welsh Enterprise Zones have received strong cross-party political support and strong support in the media and public opinion. There have also been some early success and job creation in Deeside and St Athan. If nothing else, the Welsh Enterprise Zones are currently necessary to prevent new industry being attracted solely to the English Enterprise Zones, at the expense of the Welsh economy.

Conclusion 21

The current Welsh Enterprise Zones support in general the objectives of regeneration and all opportunities should be taken to engage the regeneration policy with the opportunities that may be represented by Enterprise Zones. However, this should be subject to review to ensure that Enterprise Zones do live-up to the early promise at this stage and do not suffer similar issues of displacement to those experienced in previous applications of this approach.

Local Growth Zones

A Task and Finish Group established by Welsh Government to look at the case for Local Growth Zones in rural areas has recently reported. The report identifies key development tools and policy levers including:

- High-speed broadband and WiFi
- Consistent mobile phone coverage and 3G / 4G services
- High quality road and rail infrastructure
- Development of commercial property which meets the needs of indigenous and incoming businesses
- A planning system which enables and facilitates appropriate economic growth and development

- Heritage-led regeneration initiatives focussed on properties in key historic town centres
- Training and skills provision which is better aligned with the needs of businesses
- Business rate relief targeted at specific areas
- Business support and funding which meets the needs of micro and small businesses
- Energy supply and infrastructure which is fit for purpose
- Effective use of EU funds to support business development, job creation, and growth
- Development of the tourism offer of the county

Focusing on the three key towns of Newtown, Llandrindod wells and Brecon the report identifies a specialisation approach in which Newtown becomes a service and business focused centre and Llandrindod builds on its current role as an event and conference destination. Brecon would further develop its role as an outdoor tourism centre and niche shopping destination.

The approach is identified as a rural alternative to Enterprise Zones but with similar mechanisms for addressing infrastruc-

tural, planning and business support needs. The report also suggests the appointment of town ‘champions in each location.

This approach reflects a county level, strategic analysis which identifies specialist roles for towns which could in some cases be in competition with each. It plays to existing strengths and identifies development opportunities in each case. Further development of the concept of LGZs offers considerable promise to identifying solutions for rural towns in Wales.

Conclusions

This chapter concludes our analysis of historical approaches to regeneration evident in the UK



Conclusions

In this review paper we have outlined the gradual evolution of regeneration policy in the UK and identified some of the Special Purpose Vehicles which have emerged in support of regeneration policy. Following devolution in 1997 there has been considerable policy divergence but common themes exist in all the approaches examined. In particular combinations of policies which address the 'people' and 'place' agenda have characterised all the policies reviewed. A focus on area-based initiatives has also been a common feature in the periods considered and there is a general consensus that delivery at an identified spatial level is a core component of successful regeneration.

The range of conclusions we have identified in this analysis offer well evidenced analysis for consideration in the Welsh Government Review of Regeneration. We reinforce and add to these in subsequent Papers in this series of contributions to the Review process.

Bibliography

A full bibliography of all publications considered in our Review Papers is presented separately.

CREW: Review Evidence: Paper 2

Meanwhile Uses

International Case Studies

crew
Regeneration Wales
Adfywio Cymru

Introduction

Considerable international attention has been paid in recent years to the promotion of 'pop up' or meanwhile uses of empty premises. This paper explores international experience through a series of case studies.

Throughout the UK and internationally, the problem of empty retail premises has become emblematic of High Street decline. Failing demand for retail space, the collapse of international retail chains and the demise of local specialist traders have all served to create the boarded up gaps in our city and town centres. Nothing signals the downward trajectory of an area more than the steel shutters appearing in increasing numbers in close proximity. In parallel with the rise of 'low value' pound store retail, charity shops, pawn shops and betting offices, reasons to visit the high street can effectively disappear and a spiral of almost irreversible decline is established.

The issue is not limited to the declining retail sector as demand for local office space has also diminished with bank and building society closures adding to the flight of local authority functions to out of town office locations. Premises emptied in this process often include large areas of office space at key locations adding significantly to local blight and the appearance of decline.

Traditional approaches to remedy these situations have included both retail and property led developments, opportunities which have largely disappeared in the financial crisis. Long-term empty premises have become the norm in many of our town centres and solutions have been elusive.

This in many ways explains the increasing interest in meanwhile uses as a panacea for the ills of the High Street.

Perhaps exemplified by the 'pop-up shop' often involving local arts or community organisations, the attraction for land-lords has included simple repairs and renovations being carried out by tenants and more obviously empty-premises rate relief where premises are occupied by organisations with charitable status. Landlords with multiple premises have also been quick to recognise the ability of meanwhile uses to alter the feel of an area and create more favourable market conditions for future potential tenants.

More sophisticated models have emerged which provide marketing and display outlets for arts and artisan products. Office space is also being effectively re-deployed as informal business incubators, of particular relevance to those working in the creative, media and design industries. Here, meanwhile use premises can provide cost effective office accommodation, shared central services and a 'cluster' of related businesses trading with each other and supporting each other's external trading activities.

This provides the general background to the Case Studies presented in the remainder of this paper

New South Wales

Our case studies are drawn from examples that have been recognised internationally as exemplifying good practice in the field. Examples from Bristol and further afield in New South Wales, Australia demonstrate the variety and scale of practice which has emerged. We start in this Chapter with the extensive practice developed in New South Wales.

In recent years there has been considerable interest in the UK in 'meanwhile' uses of empty buildings in town and city centres. Whilst there is long-standing and excellent practice in the UK, notably in Bristol, New South Wales, Australia has become recognized as supporting some of the most developed practice with a reputation for innovation and excellence. Major sponsorship of the movement in New South Wales has been provided by Arts New South Wales (ANSW), a state level organization supporting mainstream arts development. New South Wales has the most active regional arts economy in Australia, with key arts and cultural sectors contributing to the State's economy. Arts activity in the region generates a total income of more than \$2.3 billion and creates 4% of employment in NSW. There is a participation rate of over 26%.

Arts New South Wales supports the Empty Spaces Project (<http://emptyspaces.culturemap.org.au/>) in partnership with the University of Technology Sydney, Shop Front Community programme. The website has a wide range of support materials for community organisations, artists and landlords. Overall the Empty Spaces Programme supports 5 Creative Enterprise Hubs with overall programme funding of approximately \$250,000 per annum. The five Enterprise Hubs are:

- Renew Newcastle
- Pop up Parramatta
- Create Innovate, Gosford City
- Art in the Heart Lismore
- The Rocks Pop up

Original experience was in Newcastle which led to the Production of a Toolkit to promote use of empty spaces. The Toolkit has 3 components:

- Marcus Westbury's Creating Creative Enterprise Hubs: A Guide based on the Renew Newcastle initiative
- NSW Planning's Arts Revitalisation Projects and the Planning System providing information on the planning system
- Arts Law Centre of Australia's Information Sheets providing legal background and sample documents.

These collectively address the key planning and legal requirements that have to be resolved in the use of empty properties for ‘meanwhile’ uses.

This overall case study examines in further detail the Newcastle, Pop up Rocks, Parramatta, and City of Sydney projects. Within this overall study, exploration of specific meanwhile uses will examine actual practice and provide clear examples of innovative development of retail, arts and business incubation opportunities within temporarily empty premises.

The Projects.

The delivery models associated with these five pilot projects are variable and designed to suit the specific local circumstances. Each has responded to local conditions and developed localised funding, management and governance models. Specific visits have been made to Newcastle, Rocks Pop-up, Pop up Parramatta, City of Sydney. In all this acknowledgement is made to Lisa Anderson of University of Technology Sydney for arranging and accompanying the visits and providing excellent guidance to practice globally.

a. Renew Newcastle

Recognised as the most successful programme, Renew Newcastle has attracted international attention and was the focus of a CREW Seminar in Cardiff on the 24th May 2012. The Director was Marcus Westbury who has since gone on to establish Renew Australia. In Australia it is recognized that the specific circumstances of Newcastle, NSW included the unique factor of a single landlord (GPT Group) owning 140 empty retail premises, a high number of arts, design and creative industry graduates in Newcastle and a catalytic funding programme from ANSW.

Background

The city experienced major economic difficulties following a 1989 earth quake which effectively closed the commercial sector of the town for over one month. Additional decline of steel, coal production and docklands have created very similar conditions of post industrial decline to those experienced in Wales. Newcastle lacked a unified town centre with the major retail provision spread along several kilometres of high street in a unique linear pattern. Clear town centre decline was very evident with over 120 empty shop premises. The area was purchased almost in its entirety by a single developer (GBT) with a view to develop an innovative retail experience based around multiple

niche and specialist retailers in a 600 million dollar plan. The 'Great Financial Crisis' impacted plans and the city faced major long term decline. The Renew Castle project emerged in response to develop temporary uses of empty buildings and retail premises. The Town Council is still looking for big 'saviour project' including possible relocation of the University to a city centre campus. This has yet to happen and one primary barrier is the separation of the city from its waterfront by the main railway.

Wall art in Newcastle

Renew Newcastle focused on bringing vitality back to the streets by creating temporary spaces available to arts groups and creative industry specialists. Surveys showed towns people



wanted a boutique approach and better local representation in their shopping experience. The temporary spaces programme fulfilled this ideal. There was also an early attempt to bring shop top living to the High St but fire regulations prevented multiple use and the programme failed. However, there is now some

regulatory change in progress which help realise this potential diversification of the city centre. GBT, the developer, are currently trying to sell holdings but have accepted they have to play a long-term game and are trying to maintain the area, generate income and are currently very happy to work with RN. RN also manages relationships with a further 10 property owners. The challenge is often one of finding who owns buildings and establishing direct contact with landlords rather than trying to deal with agents who have less interest in what the programme has to offer.



Single artist workshop/gallery

RN acts as an independent space broker to bring together property owners with potential short term users of their premises. Owners are provided with the security of a lease arrangement based on monthly renewal. Tenants forego any rights they might usually accrue by occupation and all parties are clear that the arrangement is temporary. In practice most temporary uses are maintained for longer than 6 months. Tenants are also generally very flexible to move quickly to new premises and some groups have occupied multiple spaces over time. Overall 50

properties have been utilised in the programme and currently 35 are in use. Of these historical temporary uses, 25 have moved to a commercial footing for leases. As importantly, previous pop up use premises have attracted new commercial leases because of increased footfall and on-street vibrancy. In addition, it has become an attractive place for locals with coffee bars and meeting places developing. A range of uses have been instigated for empty premises including exhibition and workshop spaces, retail outlets, cafes and craft makers. These are illustrated in the photographs. Of particular relevance to Wales is the development of shared office space for professional practitioners including architects, planners, designers, illustrators and publishers. A specific description of one such initiative (The Roost) is provided below.

The success of the programme has depended on clear commitment from the property owner combined with the support activities of RN. Funding from the City Council and Arts New South Wales and others has been critical in maintaining the project coordinator whose role is essential, not only for site activation but also relationship management.

Specific project example

The Roost is a collection of creative industry specialists who have combined to share a large open plan office space as both work space and production facilities. Some collective organisation is required around shared services and RN does not generally organise this but leaves it to users to arrange relationships. The Roost also provides hot desking facilities and currently has 25 members accessing services in the facility. Many are recent graduates and have developed high levels of collaboration and mutual trading as a consequence of their co-location. Some alternative alliances have formed which have spun out into new separate space uses.

More recently a lot more 'curating' has been instigated by RN who now try to match uses better around time and patterns of work. RN now also pays bills for electricity rather than leave it to tenants and provides some common area support. The Roost holds collective exhibitions each month and places shows in galleries elsewhere, including Sydney where this is a more developed market for their products. In this sense they are developing an overarching brand.

Shared space at the Roost



b. Pop Up Rocks

This project, located in the heart of the iconic Sydney Harbour area, has the relatively unusual arrangement of NSW funding another public authority, the Sydney Harbour Foreshore Authority (SHFA). One of the prime regeneration agencies in Sydney, SHFA is responsible for the iconic Central Quay and Darling Harbour locations. It owns the properties in each location and is also responsible for management of the visitor economy in these two key tourism industry locations which include the Sydney Opera House.

Background

Despite the international significance of the Central Quay location vacant spaces occur as a consequence of natural occupation turnover, scheduled building renovations falling demand. There was also an emerging concern that many retail premises were occupied by low quality tourist gift shops predominated by ‘Ugg boots and Taiwanese didgeridoos’. This was diminishing the appeal of the area to Sydney residents who rarely visited the locality outside of the comprehensive special events programme. Initiatives to reverse this trend include development of the Rocks Centre, an arts, food and heritage space as well as the weekend markets which focused on fine foods. These had been successful and the pop-up programme was intended to develop this further.

The initial focus was on development of the retail offer with a specific objective of promoting market-traders into fixed premises. However, initial placements engendered opposition from existing traders who saw new entrants on rent free terms as unfair competition. There were also problems with pop-up traders maintaining acceptable opening hours. With the intervention of NSW, the focus shifted to arts development with a massively over-subscribed initial call for expressions of interest. For example a key, heritage building has been deployed for the last year as an exhibition and work-space for a range of artists. The core

demands were that no permanent fixtures or damage to the building occurred during the period awaiting its renovations as a high end, boutique hotel. This in itself has created innovative use of space and associated activities.

Since commencement of the pop-up programme there has been a steady occupation of empty premises and notable exhibitions and events which have support the wider events programme of the locality. From a fringe activity of the SHFA the Pop-up Rocks Programme is now seen as a core activity and a very efficient means of maintaining vibrancy and footfall in the Rocks area.

Specific project example

A group of designers and artists have formed a collective approach to marketing called &Company. The group are in their second premises and report excellent trading



levels for the wares they produce. All parties are young designers of art and craft products. Their current facility includes productions space, exhibition and gallery space and a shop area. Additional income is derived from convening a series of workshops and classes in specific arts production techniques. These 'classes' have been notably successful and increase the market for their products. Their representative reported an excellent relationship with SHFA and during the visit a problem identified with weekend use of the square outside their premises was immediately resolved by a promise to end the activity that weekend. This was illustrative of the SHFA commitment to supporting their temporary uses clients.

c. Pop-up Parrammata

This programme is operated by Parramatta City Council from Funding provided by ANSW which covers the cost of a full-time co-ordinator within the council Spaces team.

Background

This programme has sought to tackle economic issues in an area which is increasingly seen as an alternative growth point to the existing Sydney Central Business District (CBD). The approach has focused on providing occupancy of empty retail and office premises in the core area of Parramatta. The project is

now in its second full year. Properties are owned by the city council, private developers and there are some large office premises owned by Westpac banking. The Places Team at the council work to activate empty spaces to avoid high street decline. One key area is a small shopping mall awaiting redevelopment, which is scheduled to start next year. In the meantime a number of arts based organisations have been attracted to the premises and are trading actively. These include a ceramics collective who use an empty shop as exhibition and sales space. They collectively staff the store by volunteering several days per month. This provides them with a space for promotion and sales which would not otherwise be affordable or accessible to them individually.

When premises become vacant the council issues a call for Expressions of Interest from the artistic community and are generally oversubscribed. Following the overall pattern of meanwhile uses in Australia, all leases are on a monthly basis to avoid the rights provided to retailers after six months of continuous occupation. The same restrictions do not apply to office space and arrangements in such instances can be more flexible. Occupants are required to have public liability insurance and there are now insurance companies specialising in provision for meanwhile uses organisations. One site visited was a large first floor office space occupied by 14 artists and creative industries professionals. The council covers basic requirements including office cleaning but occupants cover utility costs. This provides

individuals with a personal office location and access to a shared services provision which they have collectively assembled.

Specific Example: The African Village

This organisation is a collective of traders selling Kenyan and other African produce including clothing, footwear and design articles for the home. Based in a busy shopping mall they have taken temporary occupation of a vacant store and provide a very vibrant and visually attractive addition to the retail offer. Currently supported by 8 volunteers, the intention is to grow a

social enterprise capable of providing employment for up to three people. Other retailers in the premises welcomed their presence in preference to an empty shop, although this may be partly the re-



sult of the very specialist offer provided by the African Village

which was not in direct competition with any other store in the vicinity. Pop-up Parramatta monitoring had evidenced increased footfall for the area and African Village reported healthy trading activity. The meanwhile use of these empty premises had enabled the organisation to move from weekend market trading to a fully operational retail store.

d. City of Sydney

In association with ANSW the City of Sydney Authority operates a comprehensive meanwhile uses strategy. Supported by a small development team the programme has focused largely on arts development. It's flagship meanwhile use has been the Fraser Studios, a large three story warehouse location which has been host to a large range of arts and theatre group while the building awaits renovation and development as an element of a significant housing development for the area. This review focuses on its activities in Oxford Street, Sydney.

Background

Oxford St has suffered from more modern retail development in the central Sydney area and has begun to show typical signs of decline with empty retail and office premises, low value retail stores, fast food outlets and a general deterioration in the environment. The City Council has developed its pop-up programme to reverse this trend through the promotion of meanwhile uses of office and shop premises. The emphasis in shop

occupation has been art and design offers with three neighbouring stores offering a variable menu of arts and design products from very high end design work to affordable craft components. Platform 72 is an exhibition and sales space in which artists purchase a display option. No commission is charged on their sales so they retain the full value of sales receipts. Rather than display their work in isolation, the operators 'curate' the works so that they form a coherent whole in which some artists work is displayed throughout the space in coherent relationship to the work of other artists. In its first month of trading in February 2012 over \$24,000 worth of work was sold.

Next door, He Made, She Made exhibits and sells high end art/design furniture and provides workspace for several artists. In contrast the third store in this cluster is 20 Dollars and Under which sells up-cycled furniture and craft/design products. It also provides a production space for one artist and holds regular lectures and workshops for the public. Collectively, these have created a strong Oxford Street presence for a range of art and design producers.



Specific project example.

In a first floor empty office suite awaiting renovation the Council has created a number of discrete office spaces which it rents at peppercorn or zero levels to arts and media based organisations. Tenancies include individual media companies alongside third sector organisations such as NSW Community Music. One specific initiative has considerable potential for use in Wales as a model of business incubation. Homeworks rents at

very low rates a single, large office space and makes it available to start-up businesses on daily, weekly and monthly rents.

Occupied by up to 15 young business people it pro-



vides a relaxed and lively shared space with common kitchen and balcony areas. It has a meeting room available for bringing clients to the office. Occupants report significant improvement in business credibility with an Oxford Street address, and an ability to meet clients at a viable business address. Most occupants had previously been trading from their bedrooms with associated difficulties and felt that the availability of this space

had been of huge advantage to their attempts to start a business.

Bristol



**This case study presents
the experience gained in
Bristol**



Pilot Case Study: Capacity Bristol – turning underused spaces into creative places

The key learning points from this case study are:

- Temporary/meanwhile use of properties and land can be an effective strategy in addressing the triple bottom line of the regeneration process by bringing together the economic, social and environmental.
- The willingness to creating a level of capacity within local authority structures to support and enable tempo-

rary use projects in a flexible and innovative manner can be key to success.

- The critical function of the facilitator role in being able to address issues that demand the collaborative action of the public, private and third sectors, whilst engaging with local, grassroots organisations

Location, Scale and Context

One consequence of the current economic recession has been the increase in property vacancy rates, particularly in relation to empty city and town centre properties. Whilst more permanent and long term solutions to this problem lies with the ending of recession, with more relevant retail planning policy and addressing new methods of retailing (e.g. online shopping), there is a more immediate problem of how to deal with the role of city and town centres, in particular the problems / opportunities created by empty properties.

The particular solution that has emerged in Bristol over the past six years is the development of the temporary use of vacant property initiative, Capacity Bristol which addresses the needs of public and private sector property owners / landlords, as well as potential new occupiers. This form of occupation is now known as ‘meanwhile use’ and can be defined as “the temporary use of vacant buildings or land for a socially and economi-

cally beneficial purposes until such a time that they can be brought back into more permanent use". It makes practical use of the 'pauses' in property market processes, giving the space over to uses that can contribute to quality of life and better places. The particular focus of meanwhile use activity in Bristol has been on occupiers from the arts and creative industry sectors, although this has not been exclusively the case.

Timescale, Development Trajectory, Governance and Funding Structures

The Capacity Bristol initiative grew out of work started in 2006 by a member of the Bristol City Council Neighbourhood Arts Team who identified the opportunities for meanwhile use and devoted a proportion of their time to linking the problem of vacant property with the needs of the arts and creative industries sectors. The vibrant cultural scene in Bristol was home to many groups and individuals keen to undertake these type of projects and there was an identified need for the Local Authority to help drive this forward. The focus at the beginning was to identify the local creative activists and initiatives and build up good relationships and an understanding of their aspirations and needs. This led to problem solving and the removal of institutional barriers, as well as advocacy across council departments and with key stakeholders and landlords in the city.

The typical arrangement between landlord and user has been through short term license agreements whereby the user takes

responsibility for all running costs of the building plus at times additional maintenance responsibilities in return for use of the space rent free or at less than commercial rates. A financial incentive for landlords with empty property rates bills is that these costs can be passed on to the users. Bristol's business rates policy has allowed charities, not for profit organisations and organisations supporting the arts to apply for up to 100% relief on rates ensuring that savings are mutually beneficial.

In the context of scarce resources in terms of staff and funding, the Capacity scheme represents good value for money enabling opportunities for self-generating creative activity and tapping into the latent human capital of the city; and putting no further funding demands on public money other than officer time. Due to cuts to the Arts Team in June 2012, the project closed. However, the success achieved has resulted in the 'meanwhile' use of vacant buildings being more embedded in council processes; and there being a better understanding of the process by third sector organisations in Bristol



Problems Targeted and Solutions

1. Vacant buildings and associated problems.

- Providing information and intelligence on vacant properties and ownership.
- Regular auditing of empty council owned and assessment in terms of the potential and parameters for meanwhile use— creation of a database of available properties.

- Mapping ownership of privately owned properties and approaching landlords in partnership with potential users with meanwhile use proposals
- Setting up a website to map projects, advertise opportunities and share knowledge and resources

2. Lack of affordable spaces for creative initiatives

- Provision of flexible and cheap accommodation for creative initiatives in spaces which would otherwise be unused
- Access to a range of spaces many of which are public facing allowing for a range of activities to take place
- Creation of incubation space for new local enterprise to develop, experiment and test out new ideas

3. Arts /creative economy development

- Reaching new audiences, increased profile and visibility of local culture
- Creation of new shared spaces and increased density of creative people enhances opportunities for innovation, collaboration and strengthening of creative networks

- Attracting and retaining creatives, graduates and entrepreneurs
- Place-making – enabling home grown initiative to have stronger foothold, presence and visibility brings out distinctive character of a place

4. Urban Decay/problem properties

- Active occupation provides security and reduces vandalism, antisocial behaviour and crime
- A means to safeguard buildings at risk which benefits the local community and economy far more than standard methods of building security
- Upkeep of buildings and improvement in visual appearance
- Increasing footfall and attracting new visitors into an area
- Provision of community facilities
- Raising profile and increasing attractiveness of property and local community to future investors and commercial tenants.

5. Bureaucratic barriers and lack of buy in by landlords

- A proactive approach, advocacy and brokering support from a Local Authority to help legitimise the activity and build confidence of landlords and users to enter into meanwhile arrangements
- Supporting meanwhile users navigate different council departments and helping to deal with institutional barriers- importance of a can-do attitude from a council officer
- Developing relationships with potential users and landlords and helping to match up spaces to the most appropriate use



Interventions

Capacity Bristol has helped to open up over 30 buildings including retail units, office spaces, warehouses, redundant spaces

such as ex public toilets, police stations, swimming pools and park huts and large sites awaiting redevelopment such as an ex-college, a cathedral and plots of land. Uses have ranged widely and have included studios/workshops, pop up shops, cinemas, event/venue spaces, offices, galleries, storage , cafes and nightclubs.

Creatives and artists can often make flexible use of space deemed inappropriate or too problematic for other uses and many successful projects have taken place in redundant listed buildings and buildings at risk.

Key interventions include:

- Supporting the development of Bristol based organisation Artspace Lifespace, an artist led initiative that recycles vacant, under-used and problem properties into thriving active creative resources. This organisation has undertaken very large scale meanwhile use projects including The Island- A multiuse arts facility set up with landlords Urban Splash on a large city centre site acquired for redevelopment. The project has reduced in scale as permanent development has taken root in areas of the site. The project currently includes dance, circus training, gallery and rehearsal spaces and 50 arts studios/offices. Over 25,000 people access the facilities and services every year; The College: This education, arts, sports and community project was set up with land-

lords the Home and Communities Agency, making use of an ex vocational College since January 2011. The project includes a sports hall, a skate park, a food-growing project, gallery space and 75 studios workshops. The project is in the heart of a residential area and has generated a range of opportunities for local people, maintaining access to facilities that otherwise would have been shut down.

- Making available and coordinating the use of a range of empty council-owned buildings including shops, offices, empty toilets, warehouses and empty park buildings and running a changing programme of exhibitions, pop up shops, galleries and events such as cinemas and performance.
- Supporting independent initiatives to work with private landlords resulting in projects which have been key drivers to regeneration such as the many pop up and meanwhile projects in Stokes Croft Bristol

The key successes of Capacity Bristol:

- *The number and scale of projects realised:* Bristol has been home to some of the largest temporary use projects in the UK and has become well known as one of the most vibrant and creative cities in the world for this type of activity.

- *Legacy:* The project has helped to implement new ways of thinking and has helped bring temporary use more into the mainstream. For example, Bristol's new Enterprise Zone has identified temporary use as a key approach to drive development; the Home and Communities agency have agreed a 3 year temporary project on development land in the Enterprise Zone using temporary structures called Creative Common; Bristol City Council has written 2 Local Development Orders for temporary use; and Bristol City Council now contracts Artspace Lifespace for property management services to secure and safeguard buildings.
- *Retaining and attracting practitioners in the creative sector:* Making the city work for people with imagination and initiative and helping to grow a thriving arts scene. This has fed into Bristol's place-making strategy, which is strongly based on marketing Bristol as an alternative and creative city.

Barriers and failures experienced

The key goal of Capacity Bristol was to put in place processes whereby temporary use can become a permanent approach to urban development which can address the triple bottom line of economic, social and environmental regeneration. The main barriers/threats to this include:

- Cuts to Local Authority budgets and services has meant the loss of the project and post to drive this forward.
- Lack of buy in from landlords, particularly absentee landlords .
- Inflexible processes and resistance to doing things differently from within the local Authority
- Planned changes to Bristol City Council business rates policy which will lower the discretionary rate relief awarded to arts and not for profit organisations.

Implications for practice elsewhere

The recession has increased property vacancy rates and highlighted the need for new approaches to urban development and temporary use has emerged as one practical solution. However, this approach is not just a recessionary activity and is a useful strategy whenever there are vacant spaces and the demand to use them on a meanwhile basis. While meanwhile uses have become more common practise in terms of High Street regeneration through Pop Up shops, temporary use as a strategy can be adopted much more broadly and applied to all sorts of buildings, land and sites awaiting redevelopment.

Experience in Bristol highlights the importance for Local authorities to attract creative thinkers who will can work innovatively

within bureaucracy and challenge processes. This includes practitioners who can act as facilitators between the public, private and third sectors, who have the ability to problem solve and devise innovative solutions to problems and opportunities.

The Local Authority has a role to play in terms of creating a progressive environment for this type of activity to grow- implementing supportive processes and policy can enable and build the confidence of both the third sector, creative enterprise and landlords to engage in this practice.

Further reading and resources

www.capacitybristol.wordpress.com – no longer updated but has archive of information about and links to Bristol projects

www.meanwhile.org.uk – hub of info, advice and tools including template Meanwhile leases

www.emptyshops.wordpress.com - The Empty Shops Network has a number of useful downloadable docs

www.spareplace.com - open source mapping of temporary use spaces across the UK

www.artspacelifespace.com – Bristol based organisation undertaking large scale temporary use projects

www.creativecommon.co.uk – a 3 year temporary land use project in central Bristol



Conclusions

The experience outlined in the case studies presented here points to the value of a ‘meanwhile uses’ approach in a range of contexts and different locations. Whilst not a panacea and requiring some attention to fostering the transition to permanent use, this approach can contribute significantly to High Street recovery.

Conclusions

This wealth of experience and specific examples from Australia and Bristol provide clear evidence of the value of 'meanwhile uses'. However, it should also be noted that the success of the approach leads to more permanent uses of empty premises which can become part of the local economy and provide real employment and commercial and retail activity. If you are interested in further details of the specific case studies from New South Wales, very full case studies are available at <http://emptyspaces.culturemap.org.au/>). Although meanwhile uses are often perceived as a high street strategy, the Australian experience suggests equal applicability to the use of office space, factory and warehouse buildings. It also suggests a very clear role in business promotion and facilitating start up businesses. Although identified as meanwhile or pop-up programmes the implications for longer-term solutions are also clear.

A further case study in this review compares the Sirolli Enterprise Facilitation process in Blaenau Gwent and Auburn, Sydney. The evidence of its effectiveness is also clear and a combination of Enterprise Facilitation with meanwhile use approaches could be very fruitful for Wales.

Conclusion 22: Welsh Government should develop and fund a central programme of support for meanwhile uses that recognizes the potential to revitalise the high street and promote business start-ups.

Conclusion 23: The potential will be most easily achieved through effective partnership between local authorities, Welsh Government and appropriate agencies such as the Arts Council in Wales.

Conclusion 24: Initial work should replicate the legal and planning guidance developed in New South Wales to provide reassurance to landlords and potential tenants of their legal positions.

CREW: Review evidence: Paper 3

Enterprise facilitation

Two case studies of the Sirolli
approach

crew
Regeneration Wales
Adfywio Cymru

Introduction

This section provides background on the Sirolli Institute approach to Enterprise Facilitation which has been utilised internationally to promote business incubation in some of the most disadvantaged urban and rural communities.

Introduction

Both examples explored in this case study have adopted the principles of the Sirolli Institute, an economic development group based in the USA, and led by international economic development specialist Dr Ernesto Sirolli. The underlying ethos of the Sirolli principles is that:

“the future of every community lies in capturing the talent, energy and imagination of its people hence we specialize in responsive approaches to Local Development that grow the community from within, transforming passionate people into successful entrepreneurs.”

(<http://www.sirolli.com/About/SirolliCredo/tabid/91/Default.aspx>)

The Sirolli Institute promotes a people-centred, bottom-up and localised approach which stimulates people to become more enterprising and pursue entrepreneurship as a career path. Sirolli's belief is that a successful business requires three main competencies: technical ability to produce a product or service, ability to market the product or service, and ability to manage the finances of the venture, and that few individual entrepreneurs have ever possessed all three competencies. This is known as the 'Trinity of Management'®. Sirolli argues that successful entrepreneurs simply make up for their lack of a certain competency by finding a partner who possesses the skills which they lack. Consequently, the model aims to aid local entrepreneurs in becoming successful, by building teams of competence around them.

In practice, Enterprise Facilitation® consists of two main components; an Enterprise Facilitator and a Community Panel. The Enterprise Facilitator becomes the initial point of contact for business owners and aspiring entrepreneurs, and helps them understand their business idea. The service is free, informal and confidential, and if the client requires any help or direction with their ideas, then the facilitator can take their case to the panel. The second element is a Community Panel, composed of anywhere between 20 to 60 local stakeholders, who support the facilitator by providing introductions to community leaders, business owners and other useful contacts. The panel seeks to address the specific needs or problems of each case, and where possible attempt to provide useful local contacts and advice which may benefit the client. The Enterprise Facilitator is not an expert but someone who is a good listener, supportive, well-networked, and able to evaluate the skills and needs of entrepreneurs. The Community Panel includes local business and civic leaders, economic development practitioners, and private sector professionals. In the majority of cases there is also a smaller Management board who provide direct support and guidance to the Facilitator. Both the Enterprise Facilitator and board members receive training from the Sirolli institute in the principles of Enterprise Facilitation® and the Trinity of Management.

Potential benefits of the Sirolli Approach

This approach, whilst not totally unique in its conception, differs quite significantly from traditional business and enterprise services. Traditionally, business support has been provided by a specialist advisor, who meets with clients formally and seeks to share parts of his/her experience with the client. This process is usually governed by a set of rules or procedures and set stages which the client must complete in order to access support, and eventually reach the goal of establishing their company. The Sirolli method offers a more flexible, informal and arguably more user-friendly approach, which is able to cater for clients outside of normal working hours when perhaps traditional service providers could not be accessed. Additionally, the Enterprise Facilitation® model places no time constraint on an Enterprise Facilitator's time or length of support available to each client, meaning that clients always have access to support as and when issues arise. The Sirolli method allows for increased engagement and proliferation, by being less intimidating and more in line with the mind-set and attitudes of many entrepreneurs. Moreover, current business support cannot deliver on its targets for business start-ups unless there are individuals coming forward with business ideas. The Enterprise Facilitation® model, through its encouragement of potential entrepreneurs and its building of a resource panel drawn from local businesses and members with links into the community, is clearly about a means of delivering this requirement for growing the

'enterprise culture'. Dr Ernesto Sirolli has an excellent reputation and an impressive track record of previous success.

The role of the facilitator is to provide an informal, people-orientated enterprise development function. The facilitator achieves this by assisting potential entrepreneurs in identifying their needs and establishing a network of local contacts, who may already be known to the client. The facilitator also acts as a friendly mentor who is able to identify with the client and understand their goals and ambitions, and help the client understand how best to reach those goals. Not all business ideas are good business ideas, but the role of the facilitator is not to discourage entrepreneurs; instead the facilitator should help the client properly formulate his ideas and understand what is good about the idea, and what aspects of the idea may need to be improved, or suggest the introduction of a partner with a different skill set. Additionally, the Enterprise Facilitation® model places no time constraint on an Enterprise Facilitator's time or length of support available to each client, meaning that clients always have access to support as and when issues arise.

The Volunteer Panel, or simply The Panel, is the second major resource adopted by the Sirolli method, and is a major component of the Sirolli method's success. Enterprise Facilitation® is an equal partnership between the Facilitator and the Panel, with the latter being a key factor in the success of any programme.

The Panel is comprised of a group of volunteers drawn from the local community, who come together to establish a credible, reliable and trusted community resource. The Panel usually meets once per month or as and when the Enterprise Facilitator identifies a need, and is made up of individuals from a range of different backgrounds and interests, including local businesses, business support agencies, housing associations, development trusts, community activists and the civil service. The role of the panel is to make introductions for the facilitator, to both boost his contacts and increase the profile of the project. The theory is that by increasing the profile of the project and its services, more people in the community will be motivated to seek the advice of the facilitator. Also, once the facilitator has met with a client and established what support they require, he is able to approach the panel to collectively discuss the case and generate ideas, leads and contacts in order to help the entrepreneur.

The Sirolli method allows for increased engagement and proliferation, by being less intimidating and more in line with the mind-set and attitudes of many entrepreneurs. Moreover, current business support cannot deliver on its targets for business start-ups unless there are individuals coming forward with business ideas. The Enterprise Facilitation® model, through its encouragement of potential entrepreneurs and its building of a volunteer panel drawn from local businesses and members with links into the community, clearly provides a means of delivering this requirement for growing the 'enterprise culture'.

It is worth noting that the success of the BG Effect project rests largely on the role of the facilitator, and as such it is very important to ensure that the correct appointment is made on beginning the project. The interview process should be very intensive in order to ensure that the current person, with the necessary qualities is found. To help with this, the Sirolli institute provides guidance and support throughout the interview process.

The Blaenau Gwent Effect

This section explores the experience of enterprise facilitation during the first year of the programme.

The Blaenau Gwent Effect

Blaenau Gwent Effect was operationally established on March 14th, 2011 to provide Enterprise Facilitation® services through the borough of Blaenau Gwent, based on the principles of the Sirolli Institute. Effect stands for Enterprise Facilitation for Effective Community Transformation. The increasing financial hardships, lack of employment opportunities and anti-enterprising culture in the Blaenau Gwent area made it an ideal candidate for an Enterprise Facilitation® approach. The Blaenau Gwent Regeneration Strategy (2009) was an ambitious document that outlined the current situation in the Blaenau Gwent area and proposed an exciting vision for the future. According to this strategy:

“The closure of the Corus works at Ebbw Vale brought fundamental changes to the structure of the Blaenau Gwent economy. It took away a source of well-paid, secure employment and created massive challenges for the public authorities throughout South East Wales. However it also provided a major catalyst in forging exciting new public and private partnerships, devising ambitious and transformational regeneration strategies and accessing substantial WAG and EU funding to make the delivery of these strategies a reality... However, despite considerable activity and undoubted successes since 2002, Blaenau Gwent still suffers across a wide range of socio-economic factors.” (BG Regeneration Strategy, p. 9)

Whilst it is not uncommon for significant regenerative changes to take well over a decade, it is clear that Blaenau Gwent still needs significant regenerative support if it is to become a thriving, self-sustaining region of the future. In particular Blaenau Gwent struggles in terms of financial poverty, low rates of economic activity and a high unemployment rate. The latest Department for Work and Pensions data regarding the percentage of people claiming Job Seekers Allowance (JSA), clearly shows that the out of work benefit claimant rate of Blaenau Gwent is almost double that of the Welsh national average (Info-basecymru, April 2012). With an economic inactivity rate (excluding students) of 28.5% for the year ending 31st March 2011, again well above the Welsh average, it is clear that a new approach to creating jobs and employment is necessary in the area; and with only 4.9% of the population classified as being self-employed, compared to 8.1% for Wales as a whole, Enterprise Facilitation® would appear to provide a good fit with the prevailing socio-economic conditions of the Blaenau Gwent area. The BG Effect was established with these prevailing conditions in mind.

The BG Effect aims to create an enterprise culture within the local community and provide local people with an opportunity to consider self-employment as a career path. In doing so BG Ef-

fect hopes to both maintain current job opportunities, and create new employment in the local area which will aid in its future economic sustainability, and bring about a positive regenerative change. This approach is intended to sit alongside, and complement, the traditional business and enterprise support services, such as Venture Wales.

Management and Funding

The BG Effect project was formed out of a partnership between the public, private and community/voluntary sectors, in the form of Blaenau Gwent County Council, the Heads of the Valleys Programme and a consortium of Communities First partnerships. Funding from the Heads of the Valleys and Communities First programmes, Waterloo Foundation and Blaenau Gwent County Borough Council was obtained to get the pilot project started.

The Management Board has the overall responsibility for running the BG Effect project, securing funding and overseeing the projects delivery. The Board has 12 members with a wide range of skills and a strong team culture. The facilitator is directly accountable to the Board and its members and also meets with them monthly. This is a good working practice as it ensures that everyone is continually kept informed of the projects aims, objectives and results. However, going beyond this the facilitator is in daily contact with Mark Langshaw, Chair of the Board. This allows the Board and the facilitator to work effi-

ciently together and ensures the smooth running of the BG Effect. The project should ideally be run over a long lifespan of at least 10 years, but has thus far been unable to secure a commitment of long-term funding from the local or regional government, and is beginning to look at other opportunities at gaining income through providing training and mentoring to other similar projects.

Identification of key successes

Both the Management Board and Mark Langshaw (Chair of the Board) have been praised for adopting a strong private sector approach. This approach has been described as a refreshing approach that limits the negativities associated with bureaucracy. The facilitator, Moe Forouzan, commented on the approach of the Management Board,

“ It just blasts through the barriers and gets on with it. It is a very solution focused approach.”

One of the key factors which determine the success of the Sirolli model is the success of the facilitator. In interviews with clients, panel members and the Facilitator himself it has become clear that his passion and commitment make him perfectly suited to the role. What people seem to really value about the facilitator is his role in making introductions, introducing new

contacts and knowing exactly where to turn for the right support and information:

“If he doesn’t know someone who can help you..... actually, he always knows someone who can help you, which always gives you hope.”

Other particular features the clients felt the facilitator was able to help with included:

- Networking and generating new contacts in the local area
- Decreasing the costs of doing business
- Impartial and unbiased information, guidance and advice
- Assistance with distributing a product or service
- Marketing support
- Assistance with finding premises and work space
- Funding, loans and grants
- More general advice on what it takes to be an entrepreneur and run your own business

The image below shows exactly what the BG Effect achieved in only its first 10 months of operations.

The recent independent evaluation of the BG Effect highlighted some of its key successes as:

- The role of the facilitator is working well and is valued by local entrepreneurs.
- The informal nature of the support is valued by local entrepreneurs, and encourages more people to engage with BG Effect process.
- Awareness of the BG Effect is being increased by word of mouth, as past clients have no hesitation in recommending the process to peers, meaning more local people are being encouraged to think entrepreneurially
- Facilitator’s role improved by not having strict targets that must be met, allowing for honest and impartial advice to be given.
- The lack of rigid structure allows the Facilitator to view, and deal with, every case on its individual merits, and isn’t forced to following set criteria which may not be suitable to every client.
- The Community Panel has an impressive membership of 58, giving it the potential to be very effective; and is committed to increasing its scale in terms of numbers and increasing its skills base and the diversity of expertise offered by members.
- The BG Effect team has displayed an impressive commitment to monitoring and evaluating their progress thus far. There has been a serious organisational buy-in to the cause of monitoring and evaluation, and not a superficial

“tick box” form of monitoring. The BG Effect team are committed to understanding their impact.

- The BG Effect team has begun to adapt the Sirolli process to best suit their aims, objectives and context. One of the core principles of any localised intervention is that you must listen, and adapt your working practices to the needs and wants of the population that you are serving, and the BG Effect team has taken this on board.
- The involvement of the Sirolli institute has represented value for money for the BG Effect. The BG Effect team have gained significant knowledge, training and confidence from the involvement of the Sirolli Institute. Having the Sirolli branding has increased the profile of the BG Effect and generated interest in the project.

Current barriers

Despite the clear private sector leadership and orientation of the programme, there is currently an over representation of the public and third sectors at the expense of the private sector. However, there is a certain degree of inevitability about this given that the project is still in its early stages. Over time the management board hope to attract more individuals from different backgrounds, to get involved with the project.

Further reading/resources.

More information regarding the BG Effect can be found on their website: <http://www.bgeffect.com/>

CREW has completed an independent interim evaluation of the BG Effect which can be made available by requesting a copy from enquiries@regenwales.org

More information on the Sirolli institute, its principles and the support it offers can be found at <http://www.sirolli.com/>

More information on STARTTS can be found at <http://www.startts.org.au/>

Auburn, Sydney



**This case study explores
the delivery of the Sirolli
approach in a multi-ethnic
environment**

Auburn, Sydney

Felix Ryan, the Enterprise facilitator, is employed by the Service for Treatment and Rehabilitation of Torture and Trauma Survivors (STARTTS) a New South Wales organisation supporting refugees and asylum seekers primarily through the provision of counselling, community development and training services. However, in recognition of the major employment problems experienced by their client group STARTT is also concerned to assist economic development and employment opportunities for client groups. Felix Ryan is employed in a capacity as community development worker but has taken on the Enterprise Facilitation role following completion of the Sirolli, Trinity of Management Training Programme.

The primary target population is Sydney's Afghani Hazara population currently numbering 5,000 but expanding rapidly as initial refugees are joined by families as their status is legitimised. In anticipation of increasing and potentially overwhelming demand for service, STARTTS has initiated a Strategic Planning Strategy to build a sustainable economic community providing employment and training opportunities. Employing Asset Based Community Development principles, the programme is targeting federal training funds to ensure that refugee arrivals are recognised for their prior skills and assisted to gain employment. A

primary objective is the establishment of a Hazara Chamber of Commerce to foster business development and access training budgets.

The project has adopted the Sirolli methodology but with some reflection of local circumstances. In similar vein to the Blaenau Gwent Effect, project adaptation to local issues has ensured that the model has delivered effectively in Auburn. Notably, following initial deployment the Resources Board has been disbanded. Although it was able to recruit an effective membership, connections to the target community were weak and the personal connections of the Enterprise Facilitator proved more effective. The development of the Hazara Chamber of Commerce is anticipated to address this issue and perform the role of the Resources Board. This is in sharp contrast to the value of the Resources board identified in the interim evaluation of the BG Effect project. There, the Resources Board has proved an invaluable source of support for the Enterprise Facilitator and in many ways is contributing to the business culture of the area by acting as an informal 'business club' in the absence of active Chambers of Trade and Commerce. In this way the Sirolli project is also invigorating the existing business community.

Funding

Initial funding for the Sirolli fees was achieved from a Local Government administered grant programme funded by a levy on the gambling industry in NSW. Background support is provided by STARTTS in terms of office space and support for the Enterprise Facilitator. This has funded Sirolli fees alongside a reduction in those fees by sharing training provision with another Sirolli project in the region. Specific projects within the scheme seek further funding from a range of government sources. For example, the proposed Azara Chamber of Commerce will seek grants from mainstream training budgets.

Specific Project example

The Enterprise Facilitation programme has supported the development of the Amazing Family Daycare consortium. Initiated by a Somali woman who wanted to achieve economic independence, the Sirolli programme supported her with guidance and mentoring and connection to the wider processes of qualifying and registering child care provision in NSW. It brings together 200 registered child-minders providing multi-culturally focused child day-care. Although a for-profit business it retains a strong social ethic of employing women from refugee and asylum seeker populations. It is now extending across Australia and currently scoping developing provision in Kenya. This repre-

sents the kind of scaling-up of projects of this kind which has remained elusive in the Welsh context. Whilst in simple terms this successful business start shows the simple economic value of the Sirolli approach, in this instance it is also possible to see additional social benefits as refugee groups access good quality child care and women providers become empowered to challenge traditional gender relationships.

One difference between the Auburn community and the South Wales context is that the largely immigrant community of Auburn has high aspirational values in which new arrivals immediately seek higher economic status. This ensures a vibrant informal economy but also the transfer of activity and individuals into the mainstream economy. In contrast the primary problem that the Blaenau Gwent project has sought to address is that of low aspiration and a general failure to recognise economic opportunity.

Conclusions

4

This section identifies the implications for Wales and conclusions of relevance to the current review of regeneration.

Conclusions

Implications for Wales

Dr Ernesto Sirolli has shown, with examples of projects from communities around the world, that the Enterprise Facilitation model can be implemented, with great success, in any community and any culture around the world. These claims have been tested in Blaenau Gwent and the evidence from the evaluation of the first year of activity suggested a level of success beyond expectations. Further evidence from the Auburn Sydney project also provides substantiation of this view. Much has been made of the 'enterprise deficit' in Wales and particularly in the South Wales Valleys. Enterprise Facilitation appears to provide a means of releasing latent enterprise ambitions in even the most disadvantaged communities. It was also suggested earlier that coupled with a meanwhile uses strategy this could provide a potent combination for business development and high street renewal in Wales.

Conclusion 24

Enterprise Facilitation initiatives in Wales should be actively supported and funded in future regeneration policy.

Conclusion 25

Linking Enterprise Facilitation to a meanwhile uses strategy could significantly improve the outcomes from both approaches.

CREW Review evidence; Paper 4

High Streets and Town Centres

A series of case studies

crew
Regeneration Wales
Adfywio Cymru

Introduction

Considerable attention has been focused on the problems confronting high streets and town centers. These case studies are of locations generally recognised as exemplars in the solutions they have provided and the approaches they have developed.

Introduction

The case studies presented here draw on international experience in alleviating the pressures experienced in town centres across the globe. Experience in Wales will not be identical and indeed every town will present an almost unique set of individual circumstances and combination of the issues currently challenging town centres and high streets. The purpose of these case studies is not to suggest that each is a magic bullet which if implemented in Wales will prove a panacea. Rather, the purpose is to provide illustration and inspiration that action can be taken and that decline can be reversed. Elements of these approaches may work in Wales and there may be activities already in place which reflect some of these approaches.

The case studies are:

1. Voluntary Developer Partnership – Paddington Waterside, London.
2. Case Study: Business Improvement Districts (including city and national umbrella and catalyst organisations in Canada and Scotland).
3. Case Study: Creative Industries on High Streets – The Tobacco Factory, South Bristol.
4. Case Study: Marylebone High Street and ‘Village’

5. Case Study: Local Asset Backed Vehicles (the role of public sector land holdings in the context of Croydon and Bournemouth Councils).
6. Case Study: Meanwhile Uses (‘Meanwhile Project’ in the UK and ‘Renew’ in Australia)
7. Case Study: From Industrial City to Eco-Urbanity.
8. Case Study: Residential Densification, Vancouver; the New Homes Bonus, England.

The Case Studies

This chapter presents the case studies in full.



Paddington Waterside

Voluntary Development Partnership

Location, Scale and Context

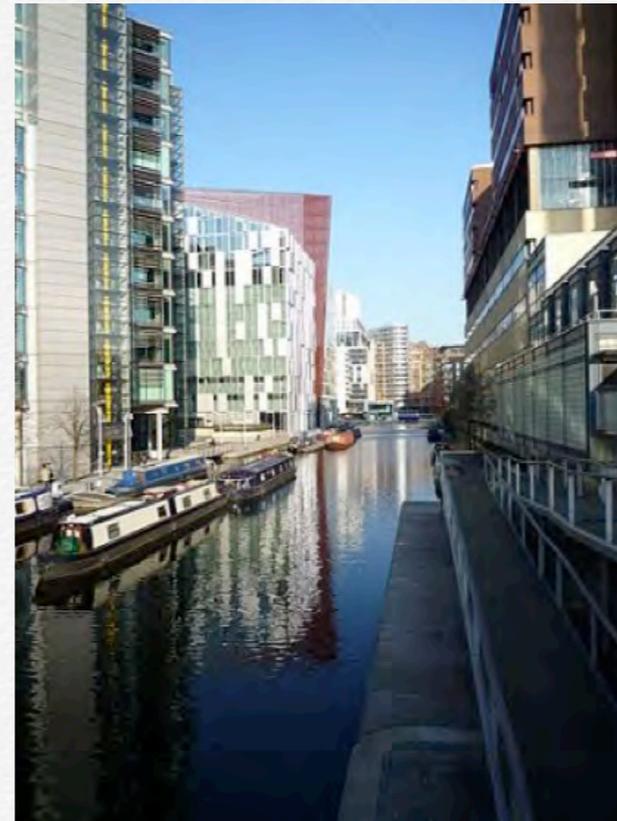
The key learning point from this project is the exceptional level of voluntary, collaborative working between a large number of developers to ensure the whole (a new piece of city) was greater than the sum of the individual parts (sites). The principles can be applied far and wide in regeneration where multiple landowners have competing interests.

Paddington Waterside involves 13 different development schemes across 80 acres, with a development period, which began in 1998 and still continues today with over £3bn worth of development completed.

This Voluntary Landlord and/or Developer Partnerships has proved itself to be an effective approach to delivering significant development and regeneration in which there are multiple land and property owners. This partnership format knits together the

'common parts' elements of the development and property process whilst still allowing owners to advance their individual inter-

ests in the usual way – i.e. to both cooperate and compete at the same time:



- By 'cooperate' we mean in terms of interfacing with the public sector, in particular public realm, masterplanning, place making and s106 issues and considerations;

- by 'compete' we mean in terms of building or renovating and marketing their own buildings to occupiers and investors.

These partnerships are very much an enabler and do not become a large, unwieldy delivery vehicles. Annual business plans are delivered by a variety of mechanisms and funded from a number of sources. They lend themselves particularly well to Enterprise Zones and other large scale development projects, however may also be adapted to informal landlord partnerships to turn around failing high streets and town centres.

Governance and Funding Structures

Members of Paddington Waterside Partnership subscribe on an annual, voluntary basis. The Partnership is not-for-profit and operates as a company limited by guarantee. Subscription levels for developers are determined by scale of development (typically around £15,000pa), and for occupiers by staff numbers/floorspace occupied. Together with s106 contributions this creates a financial platform to employ a small executive team and implement projects.

The partnership remains flexible with contributions (financial and 'in-kind') by individual Partners. In this context the Partnership recognises that the development process planned for Paddington Waterside should be considered in an integrated way in order to achieve the most positive impact possible for the surrounding local community.

Funding arrangements for individual projects over their lifetime are subject to change and potentially include a number of sources. Certain projects are likely to be funded exclusively from monies directed by the Council. An individual owner may support a project in full for reasons of location where it has a direct relationship with their property. Alternatively, projects of a less site-specific nature may be funded via public funds.

Problems Targeted

The Partnership employs a small executive team to perform a number of distinct functions on behalf of all of the partners including:

- a regular mechanism for exchange of development information and best practice through its Developer Forum;
- production of composite marketing and communications voice for the entire 'place';
- a link between the developments/developers and the local community;
- operating a recruitment service to match local jobseekers with vacancies in the new developments;
- assisting companies with corporate social responsibility (CSR) activities at a local level;
- catalysing and managing Paddington Business Improvement District (BID).

To ensure integration with local authorities and other public sector agencies, a sub-group chaired by the Partnership's Chairman and the Leader of the Council on a rotating basis is created. The group remains informal in nature and provides a

unique opportunity for representatives from local social and economic groups to meet together with the local council and the partnership, to consider opportunities. It provides an essential sounding board for all interested parties.

Interventions

In Paddington in the mid to longer term, the following priorities emerged:

- Marketing – promoting the area as the premier commercial, employment and residential district of London to potential investors and other key organisations and individuals;
- Working as the lead private sector partner in a local ‘Education Action Zone’ and brokering new partners to support schools;
- Developing the local economy and providing employment and training opportunities for local people through Paddington First, with a key focus this year on construction;
- Upgrading the public realm and establishing a set of principles for a coordinated approach to public areas within the new developments;

- Integrating the new developments with the existing urban fabric through the implementation of a series of projects as part of the Paddington Management Zone.

Timescale and Developmental Trajectory

The original partnership, formed by a small handful of developers in 1998, quickly grew to a core of c14 developers and landlords with principle interests catalysing the right environment for development – ie agreeing a masterplan for the area and estate managing the new ‘piece of city’.

Today as the developments mature the main objectives have also changed and evolved into:

1. Managing the BID (business improvement district on behalf of neighbouring businesses in and around the new developments;
2. A Corporate Community Investment Programme, assisting companies deliver their corporate social responsibility (CSR) activities at a local level. For example, corporate community involvement initiatives, employee volunteering, long-term skill sharing, mentoring programmes, school workshops, (including placing over 500 employee volunteers each year with more than 50 charity partners and schools).

Why is it Best Practice and Key Successes

From dereliction to this, in ten years:



Many large scale physical regeneration projects are stymied by fragmented ownerships and the egos of many property professionals leading to confrontational

culture as opposed to collaboration. This is a rare and outstandingly successful example of those failings being overcome and a culture of cooperation enabling very significant positive change.

The key physical, social and economic development successes are impressive, including two flagship Hilton hotels, over 1000 residential units, c3m sq ft of commercial space (including M&S

HQ), extensive public realm improvements (including 1,000 metres of canal towpath open for first time in 200 years), c£3 billion of investment, creation of a local labour market support unit placing nearly 10,000 people and catalyst for a Business Improvement District (BID).

Barriers and failures experienced

There is little evidence of failure in the experience of Paddington. In the late 90s multiple landowners sought to work together to bring forward significant physical development and fifteen years later they have succeeded not only in terms of physical development but also in terms of economic and social gains and creating a place that residents, workers and visitors enjoy. Possibly the affordability aspect of the development could be held up as a failing with the prices of residential particularly high however a high price is clearly evidence of high demand and is itself a factor of success.

Implications for practice elsewhere

There are implications for numerous projects in which there are multiple property owners of sites or buildings who need to collaborate more effectively to achieve collective goals in terms of public realm improvements or wider estate management issues that often 'fall between the cracks'.

The most obvious application is in Enterprise Zones in which there are – almost inevitably – multiple landowners. Other applications might include high streets and town centres which are



under pressure and a more proactive approach is required to ensure the offer remains competitive relative to out-of-town retailing or e-tailing. Inevitably this will re-

quire greater management and/or investment of the public realm for which local government can no longer be expected to relied upon to lead on their own.

Further reading and resources

The partnership has more than one website which has considerable detailed resource for further reading. In order of priority:

- The publications page of Paddington Waterside Partnership – the principle partnership website. [Here](#)

- Paddington Business Improvement District – which was catalysed as a pilot BID for the UK in 2004 by the Partnership [Here](#)
- Paddington Central – the website of one of the main developers [Here](#)
- In Paddington – the business listings website for the area created by the Partnership and BID jointly [Here](#)

Business Improvement Districts

City and national umbrella and catalyst organisations in Canada and Scotland

Location, Scale and Context

A BID is a business-led partnership that improves trading conditions in a high street or town centre - in a similar way that a shopping centre manager does in modern malls. The concept was created in Canada in the 1970s and is now copied in the US, Europe and other continents with thousands of different BID partnerships now in successful operation.

BIDs vary in size but typically comprise a few hundred businesses clubbing together and backing a business plan that sets out a range of activities that are funded by a BID levy that is usually equivalent to 1% of rates (perhaps around £10 per week for each business. Typical activities include more cleaning, policing and/or marketing. Increasingly BIDs are aimed at cash saving strategies for businesses also - through collective purchasing - thereby striving to make the BID overall cost-neutral or even positive for businesses.

Governance and Funding Structures

BID legislation was passed in 2003 in England and Wales, (and amended in 2004/5) and sets out:

Ballot – a BID is created following consultation and a ballot in which businesses vote on a BID Proposal (business plan for the area) and sets out businesses' priorities for improvements for the area and area services and how the BID will be managed and operated. All businesses eligible to pay the levy are balloted and the ballot is run by the local authority. The ballot must be won on two counts – majority by number and by rateable value (this is designed to ensure that the interests of large and small businesses are protected), however there is no minimum turnout threshold.

An operating agreement is entered into between a BID and their local authority governing how the BID levy monies are collected and administered and passed over to the BID. Central to this are 'baseline agreements' – with the local authority and other service providers which guarantee the level of service provision in the area. These ensure that any services the BID provides are truly additional. These are legally binding once a ballot has been won and becomes the framework within which the BID will operate.

BID levy and funding – a BID is funded through the BID levy, typically 1-2% of a businesses' rateable value with higher levies in locations with lower rateable values. The levy is mandatory for all eligible business occupiers however BIDs can choose to exclude certain businesses from paying the levy (and therefore from voting in the BID ballot). Usually BIDs exclude the smallest businesses and charities as the levy is too small to merit the collection costs. BIDs are often successful at attracting funding in addition to the BID levy such as property owners, the local authority and other public sector grant making bodies (as the BID levy can act as 'match-funding').

Governance and management – most BIDs are not-for-profit companies limited by guarantee and set out how they will be governed in their BID Proposal and Company Articles of Association and are governed by a board drawn from businesses in the BID area. BID management teams vary with the size and focus of each BID, are generally kept small and focus on project delivery and administration. Performance measurement is important to demonstrate tangibly the improvements to an area and most BIDs commit to specific Key Performance Indicators (KPIs).

BIDs run for a maximum of five years and are renewed through a further ballot process. Evidence suggests that once a BID has been set up the vast majority will continuously renew.

Problems Targeted



BIDs are most commonly used in failing commercial areas – in particular town centres and high streets. The very first BID was created in Canada (Bloor West Village, Toronto) on a traditional high street nearly 40 years ago in response to the opening of a near-by out of town shopping mall. The concept has been copied across North America and numerous other countries with the vast majority of problems addressed being in failing urban centres – ie flight to more modern out of town malls with car-parking and now the internet.

Interventions

BID projects and services are selected by business for businesses. Typically they are cleansing, security, marketing and collective purchasing in addition to working closely with local partners to achieve the improvements that businesses desire

for an area. The benefits of BIDs cited by businesses are wide-ranging and include:

- Increased footfall
- Improved staff retention
- Business cost reduction (shrinkage, crime, joint procurement)
- Area marketing and promotion
- Networking opportunities
- A collective business voice and representation on issues affecting their area
- Assistance in dealings with the Council, Police and other public bodies

Newbury BID Event



Timescale and Developmental Trajectory

BIDs typically take 6-12 months to set up, the amount of time largely being dependent upon the level of business engagement that already exists and the number of BIDs being targeted to support the mechanism.

Barriers and failures experienced

The biggest barrier for BIDs is the amount of work necessary to get the partnership off the ground in the first place with very little evidence of anywhere managing it without the support of government grant, usually to pay for a specialist consultant. As consultants are becoming more practiced in setting up BIDs in the UK efficiently, the cost is dropping. A good indicator is the Scottish Government's offer of £40,000 set up costs to councils wishing to launch a BID in their constituency.

Implications for practice elsewhere

BIDs have been successful in North America and the UK, with the evidence – to a degree – being the rate of take up. In the US there are over 1,000 BIDs whilst the UK has managed over 100 in only c6 years since the enabling legislation. However it is Canada that has really advanced the concept with some individual cities having 70+ BIDs (eg Toronto). This commitment to the concept in Canada has translated into one of the reasons Canada proudly boasts 3 out of 5 of the world's 'Most Liveable Cit-

The Economist's World's Most Liveable Cities 2011 (Top 10)^[2]

	City	Country	Rating
1	Melbourne	 Australia	97.5
2	Vienna	 Austria	97.4
3	Vancouver	 Canada	97.3
4	Toronto	 Canada	97.2
5	Calgary	 Canada	96.6

ies'. Canada does seem to have stolen a march on many countries in planning and managing cities and much can be learnt from them in addition to slavish adoption of BIDs to manage their commercial districts.

Scotland is advancing fast in the BID universe with its dedicated agency – BidsScotland.com setting up 11 BIDs since 2008. Most interestingly in Scotland they have introduced legislation that enables property owners as well as property occupiers to be levied. This opens up the possibility of doubling the amount of money raised for a given area and properly engaging the property owning fraternity who often bring a different but equally important agenda to the table – typically longer term with concerns around planning, economic development, public realm etc.

This dedicated sponsoring agency approach is important given the challenges of setting up a BID for individual places. Similarly to Scotland, the larger Canadian cities have set up dedicated agencies – eg in Toronto Association of Business Improvement Areas (www.Toronto-bia.com).

Further reading and resources

UK BIDs ([here](#)) – supports Business Improvement Districts (BIDs) in the United Kingdom and incorporates the National BIDs Advisory Service and is delivered by ATCM - the Association of Town Centre Management, who led the government-supported National BIDs Pilot that introduced BIDs to England and Wales.

Toronto Association of Business Improvement Areas ([here](#)) – a non-profit umbrella organization working with the over 72 Business Improvement Areas within the City of Toronto who in turn represent more than 30,000 business & property owners.

BidsScotland ([here](#)) – Scotland is advancing fast in the BID universe with its dedicated agency supporting councils and business groups.

Creative Industries

The Tobacco Factory, South Bristol

Location, Scale and Context

Anchoring one end of North Street in the urban 'town' of Bedminster just south of Bristol city centre, the Tobacco Factory represents a wonderful



story of both mixed use regeneration of a single building and positive impact on a failing high street.

A remarkable robust brick structure designed by the architect Sir Frank Wills – a leading member of the Wills family who commissioned the building and made their fortune in tobacco. Sir Frank had also designed the Bristol City Art Gallery, now the Museum and Art Gallery, which was one of the many gifts of the Wills family to the City and its institutions.

The Tobacco Factory today represents just one of what had been a large complex, the rest having largely been demolished in the mid 90's. The whole site – constituting approximately one

million square feet of factory buildings had, apart from one building at its northern end, now occupied as Imperial's HQ, been sold to a private developer. The site changed hands in a series of deals. The last of the purchasers went into receivership in 1993 and the sale of the site was put into the hands of receivers who decided to demolish the buildings and sell various plots.

Governance and Funding

Local architect George Ferguson had long admired the complex and had developed a sketch plan entitled 'a sustainable urban village'. This failed to convince, but not being prepared to contemplate defeat he decided to make a 'silly offer of £200,000' for the corner site on which stood some 44,000 sq ft and to his surprise the Receiver accepted.

Problems Targeted

Having bought the building in the middle of a deep property recession in the early/mid 90's he had to dream up a purpose for his newly acquired 'red elephant' and what he considered an ideal opportunity to demonstrate to deeply sceptical property developer and agent friends, who all advocated the wisdom of single use 'monoculture' development. He was determined to show them that the more you mixed it the better and more sustainable it would be despite being sited at one end of a run-

down high street in an area that was suffering from depression at the loss of its staple industry and employer and a country in the throes of a macro recession.

Interventions

The first task was to create some much needed income. The easiest start was with workspace, mainly utilising small management



offices on the ground floor, followed by bigger spaces created from the laboratory spaces on the second floor. This was driven by a desire to create a community of independent creative industries, requiring a blatantly selective leasing policy. Pent up demand existed for ‘funky’ affordable space from those looking for an alternative to standard city centre offices that fitted their more freewheeling and creative lifestyles.

Ferguson felt strongly that the Tobacco Factory had to put the arts at its core. He had started by allowing some artists to occupy raw unserviced space on an informal temporary basis partly to occupy a building vulnerable to vandalism. His instinct was that its future should be driven by the performing arts rather than being another ‘art-space’ building – and that it should strive to give a new heart to the community and to the ‘cultural desert’ that South Bristol then was. Serendipity would have it that the locally formed Show of Strength theatre company were looking for a home. It fitted his plans and he identified a space on the first floor that had been part of Imperial’s head office with its standard suspended ceiling office interior – he stripped it bare, back to its concrete 12 ft high ceiling, steel columns and patchy timber and quarry tile floor, leaving only a few ducts and pipes to maintain the factory character and left them to paint it black, bolt up some lights, and to get on with it. That was the birth of the Tobacco Factory Theatre.

Theatres bring with them people who want to eat and drink and apart from a couple of greasy spoon cafés which closed early, there was nowhere to eat for theatre goers. Ferguson heard that Teoh, who had established a restaurant in the inner city area of St Pauls was in search of a second place South for the river. It was just what he was looking for in terms of a very affordable eatery – serving Chinese, Japanese, Malay and Thai food. Opening in 2000, it proved to be an instant success. The second theatre spin-off came in the form of a ‘performance

school' for young people, and occupied the studios that had



been created on the remainder of the first floor, bringing teenage dancing and singing 'wannabe's' to the Factory, alongside all forms of activity from Martial Arts to Belly Dancing.

With activity growing it was decided to set up a dedicated Tobacco Factory café/bar in the remaining space on the ground floor drawing on inspiration from Manhattan's cosmopolitan mix, ie urban 'edge', in a socially mixed area, not scary to anyone of whatever age or background – and above all affordable and inclusive. The space was stripped back to its basics – with additions reflecting its industrial character, distinguishing it very clearly from the offer in either the city centre or the (then) smokey local pubs. Nothing would be hidden under some beer stained patterned carpet or softened with curtains or cushions. This aimed to be an independent and indestructible place with no pretensions. 'As I did wherever I could in the building, I 'went with the flow' keeping all that was sensible to keep, in this case turning a laboratory cold store with its impressive doors, into the cellar – putting it at the heart of the operation. This 'making do' approach makes decisions for you – it is not a cop-out but a fun-

damental aspect of sustainable conversion, as was the desire to reuse as much in the way of elements and materials as was possible. This applied to the reuse of the massive slabs of slate from the upstairs rooms. Failing to find suitable lights at the right price to hang over the bar, I cut up and bent bits of steel gauze to form each fitting at a cost of pence. The effect was spot on!

The car parking area was reduced in order to form outside eating and drinking space in 'The Yard' – giving the al fresco life. It's Ferguson's view that the provision of good local food, attractions and environment is a basic sustainability issue.

The building's reputation began to attract more of the sort of the spirited operations that had been hoped for. The call centres etc were not welcome, leaving room for predominantly locally grown creative independents.

The seven lofts on the upper floors are 'Manhattan' inspired lofts influenced – 7 large spaces varying from over 90 to 200 sq m for which both live and work planning designations were secured to maintain flexibility. As it happens the majority are usually in work mode with occupants varying from conservators to computer graphics.

The other vital issue for the Tobacco Factory is that of sustainability and energy efficiency. A water harvesting system from the roof serves the toilets to the bar and they recycle as much

as possible and take every opportunity to reduce demand both directly and indirectly as well as to develop more efficient and renewable systems including a large photovoltaic system driving the Theatre cooling, landlord lighting and electric car, down to switching and zoning of heating and lighting systems. The aim is to move towards carbon neutrality – and to generate as much as they can on site – before offsetting the rest with such things as the planting of trees and investing in their own off-site generation or forestry.

Tobacco Factory is a project without an end. The theatre will of course develop its programme and audience under the care of the energetic Tobacco Factory Arts Trust and the rest of the building will



change to react to circumstances and need. One of the elements with the greatest potential to develop is the Sunday Market, which occupies the car park around which they constructed a permanent shelter structure for stalls. On regular occasions throughout the year they spill the market and street fair activity onto the adjacent roads including road closures to traffic and are at the heart of Upfest, an international street artist gather-

ing, and Octoberfest organised by their own brewery, the Bristol Beer Factory.

Timescale and Developmental Trajectory

Ferguson bought the building during the recession in 1994 on a tight budget with projects unfolding incrementally out of necessity as much as anything else. Creative office users provided income with minimal capital outlay. They were followed by the theatre shell being made available which provided a platform of demand for the first ground floor restaurant in 2000.

Barriers and failures experienced

The Tobacco Factory today is a resounding success and is a cultural icon in an otherwise largely deserted south Bristol.

Implications for practice elsewhere

This story is as relevant to failing high streets as much as large obsolete buildings. Numerous high streets and town centres around the country could start the process of renaissance by creative and flexible consideration being given to derelict buildings either on or close to their high street as our traditional shopping locations change from high streets of consumption to multi-functionality.

Further reading and resources

This case study is drawn largely from interviews with George Ferguson and from his article From Woodbines to Woodchips...The rescue, Regeneration and Retrofit of a Century Old Tobacco Factory.

For a video setting out the contrasting fortunes of the Tobacco Factory end of Bedminster with the 'other end' see the successful Town Team funding application

<http://www.youtube.com/watch?v=S4csUSDs5j4>

Section 4

Marylebone High Street

Location, Scale and Context

As centrally located and well connected as it is possible to be, just five minutes' walk from London's Oxford Street, Marylebone today fosters the kind of community spirit you would associate more with the a favourite small town than an inner city ur-



ban location. The buildings are attractive and built on a very human scale, people know each other and the place pulsates with community groups, art groups, clubs, etc. There is a cross section of groups by age with young professionals drawn to the area since its renaissance beginning just before the new millennium living alongside people who have been local since the war.

Much of this character and personal touch is provided by Marylebone's retailers and adds to this village atmosphere and is a magnet for some of the most coveted fashion, beauty and home-ware boutiques anywhere. However there is also a butcher, baker and whilst no candlestick maker there is a button shop, a

ribbon shop, a shoemaker's, an old-fashioned hardware shop, London's finest bookshop, art galleries, a weekly farmer's market, and one of London's best cheesemongers.

One of the draws for businesses here, especially restaurants is they know that there's a large community of sociable residents living quite literally above the shop or on an adjacent high street.

Governance and Funding Structures

Renaissance of the street coincided with a major change in the management of a key local landlord. Howard de Walden Estates owned most of the freehold shops in the High Street, but because of the grant of head-leases, they actually controlled only about a third of the shops. However this provided a sufficiently good starting point to have a significant influence. The new management recognised that if the High Street was to be restored it would lift the area as a whole, including the office and residential values of the Estate's adjoining properties.

Problems Targeted

Marylebone High Street hasn't always been the thriving success shoppers and visitors see today. Although historically up until the 1960s Marylebone High Street was a thriving community high street with independent greengrocers, shops and butchers, and in the 1960s it sadly went into a long and gradual

decline continuing throughout the '70s and '80s before finally collapsing during the recession of the early '90s. By 1995 a third of the shops were either vacant or occupied by charity shops that paid no rent at all but were there to reduce the rates liability.

Interventions

It was clear that the High Street had to attract significantly more shoppers from outside the immediate area. A decision was made to bring in a supermarket which would effectively anchor

the prime location of the High Street. However which one? Despite the fact that significantly higher offers were received from both Sainsbury's and Tesco, the Estate chose Waitrose as



they envisaged this would be a bigger draw from other areas. A great deal of work went into assembling the site including the need to acquire a fully occupied Council house and difficulties in providing solutions to the engineering problems of creating such a large space within a conservation area with some 30 occupied flats above.

At the northern end of the High Street a derelict tyre depot had been empty for many years and The Estate agreed to sell a long lease to the Conran Shop to provide a large (25,000 sq) ft store which would anchor one end of the High Street, whose presence could create the reassurance needed to attract smaller retailers for the standard shops in the High Street.

With anchor stores in place work commenced improving the remainder of the High Street. The Estate controlled only 40% of the 85 shops etc and therefore it needed to raise its level of control. An active acquisition programme ensued and as a consequence, overall control rose to a very significant 70%.

Attention was then focused on the quality of the retailers as many units were occupied by photocopying shops, travel agents and other retailers who had completely lost their way. Although many of these retailers had statutory rights to renew their leases at a market rent, the Estate made offers of alternative accommodation in side streets to persuade a great deal of less appropriate retailers to move and make way for an injection of fresh retail ideas into the High Street. The Estate recognised that in many ways, removing tenants was the hardest phase of the project as they had limited legal powers and they generated some bad press as many people remained sceptical about the stated ambition of improving the High Street particularly people who had worked virtually all their lives on the High

Street. It was far easier to gain possession of the charity shops as these leases excluded renewal rights.

With vacant possession of some of the smaller units, many were extended as they were awkward in shape, damp and un-economic in size. A typical Victorian shop is small by modern standards and comprises only 350 sq ft of trading space with a light-well at the rear and a small corridor through to a small storage room. In the majority of instances, the light-well was covered and the shop knocked through so that it contained approximately 700 sq ft of relatively open retail space, which was far more economical with plenty of storage space in the basement (sometimes opened up to provide retail space, although usually with limited success).

Typical Victorian shops also have an adjoining but separate door to the upper residential parts which in modern retailing terms meant the retail frontage was narrow and provided the trader with a limited shop front. Thus upper parts were subject to lateral conversions through the party-wall in order to provide more modern residential accommodation and allow one staircase to serve buildings which have been laterally converted across 3 or 4 original buildings with the redundant entrances incorporated into the retail area, providing a much more prominent retail frontage and better trading potential. This also significantly improves the residential accommodation, although this

can only be achieved if the landlord has uninterrupted ownership of the buildings.

The Estate avoided creating dull, rectangular retail units that many modern multiple retailers prefer and sought to retain quirkiness and character within the shop, in order to support a more interesting retail environment.

Not all the street needed changing and it was important to look after what was good, and the Estate made a special effort to ensure that these tenants were retained and were always offered 'comfortable' terms at renewal.

Tenant selection was based on avoiding the multiples who frequented Oxford Street just half a mile away and the exclusively expensive retailers who occupied Bond Street. The Estate sought retailers that would contribute to a sense of community and had a point of difference, were exclusive in terms of their merchandise but not price point and would service the needs of the majority of residents and local working population.

Finding the right retail agency advice for this sort of approach is very difficult as most agents are geared to doing deals with multiples and have no real understanding of what works for the small retailers. The Estate also kept the lines of communication

open with residents, local groups and anyone else who had a view, over which new retailer would be appropriate for Marylebone High Street. In short it amounted to a huge informal consultation, visiting and interviewing numerous retailers with one fundamental question, 'what do the residents and local working population want on a day to day basis and what will make them visit Marylebone High Street rather than competing, neighbouring streets'.

Examples of new retailers are Cath Kidston, Cologne & Cotton, Divertimenti, VV Rouleaux, Fishworks, The Ginger Pig, La Fromagerie, Rococo and La



Pain Quotidien. Some of these retailers were put in the more affordable side streets to ensure that if the High Street became too successful, the nature of their business would be unable to afford the High Street rents. An example of the success of this has been in Moxon Street which has become a niche specialist food street and farmer's market complementing the High Street.

Most neighbouring landlords became enthusiastic supporters with many using the same letting agents and consulting with The Estate us on who they should let their shops to with an informal collaboration now ongoing between landlords.

Public relations and marketing were important from an early stage with a marketing strategy adopted costing thousands of pounds. However, as positive press reaction grew so momentum grew and quickly it was apparent that it was no longer necessary to promote the Street, but its unique tenant mix did this itself and now the Estate only has to subsidise the Christmas Lights and Summer Fayre (c30,000 people visit).

The introduction of the Farmers' Market on Sunday, and a Saturday market called Cabbages & Frocks (created by the organisers of the popular London Fashion Designer Sales – a combination of fine and organic Continental and British food alongside fashion) have turned the Street from a 5 day week trading destination to a 7 day week offering, with some traders reporting their best trading day being on Sunday. With the exception of the Banks, all the shops open on Sundays (in the late 90s 70% of the shops were shut).

Timescale and Developmental Trajectory

The trough for the High Street was the mid 90s following the recession in the first part of that decade. The major interventions of two anchors (Waitrose and Conran) were implemented by

the end of the decade when most of the smaller shops were also being addressed.

Barriers and failures experienced

Although in most respects this is one of the best high street turnarounds anywhere in the UK, some mistakes were inevitably made. The Estate recognize that sometimes they got their tenant selection wrong as some of the new retailers gave outstanding presentations but turned out to be a disappointment in practice. On the other hand others surpassed all expectations.

Also if you look hard enough you will inevitably find some complaints of gentrification etc however The Estate are unapologetic that it 'must be remembered that retailers do have their day and if we support those retailers that are failing their continued presence will impact negatively on the tenant mix'.

Implications for practice elsewhere

The implications are that there is a great deal to be learnt from the principles adopted and approach to turning around a failing high street as strong evidence of such tangible turnarounds are very rare in the UK.

Rental survey indicate that Marylebone High Street is one of the strongest performers in the United Kingdom with footfall now 3 times greater than at the beginning of the renaissance process. The High Street has won numerous awards including

being voted by Radio 4 listeners as London's favourite street in a survey commissioned by CABI. In its inaugural year, the Estate won The Academy of Urbanism's top award for the best street project in Britain and Ireland.

You can see and feel the community atmosphere with a good balance of shops and the traditional retail theory has been confounded by creating best value, not by letting to blue chip multiples but by doing the very opposite and creating a community and genuine urban village.

Further reading and resources

Key elements of this case study has been drawn from articles produced by the Howard de Walden Estate and may be found at www.hdwe.co.uk together with the customer facing website.

Local Asset Backed vehicles

Croydon and Bournemouth

Location, Scale and Context

Over the past decade nearly half the Regional Development Agencies (RDAs) in England adopted the use of local asset backed vehicles (LABVs) as a means to manage and/or develop their property holdings. Their lead was followed by councils such as Croydon, Bournemouth and others and recently in light of the recession and governmental austerity measures, the approach is increasingly being seen as an answer to regeneration woes with government department and select committees recommending the approach.

The scale of the approach varies from location to location and the state of the economy with the same development assets losing more than 50% of investment value from peak to trough of the recession. That said, typically, LABVs will be quite sizeable in their scale with tens of millions of pounds worth of property assets invested by the public sector to be matched by the private sector.

Problems Targeted

LABVs incentivise the private sector to invest and deliver in physical regeneration over the longer term, as returns are sub-

ject to performance of the partnership over 10–20 years as an entire neighbourhood or town centre is uplifted. This compares with the short-term opportunism and ‘cherry picking’ practiced by many developers, which can be damaging to the prospects of neighbouring buildings and the area as a whole.



This longer-term investment perspective is the single most important benefit of the LABV approach and is increasingly being recognised as an essential piece of the regeneration jigsaw. LABVs offer the opportunity to subsidise uneconomic early sites by the prospective future uplift of the whole, and potentially escape reliance on fast disappearing European grant aid (indeed in many respects it acts as an exemplar approach for European funding given the move from grant to investment based principles). An illustration of the long termism essential to large scale physical regeneration is illustrated above in the ISIS LABV (between British Waterways and Igloo Regeneration) in their impressive transformation of Granary Wharf, Leeds.

LABVs build a genuine partnership between partners rather than simply the management of a process of a contractual nature (ie PFI or development agreements), which is inevitably inflexible and confrontational. The purpose of the vehicle can also be grounded in wider public sector regeneration objectives that are beyond physical development and financial returns. For example, many LABVs are being set up in the context of CDCs and, as such, will be required to underpin economic development objectives.

These objectives may be drawn narrowly (eg building incubator units) or widely (eg creating a vibrant and attractive town/city centre that will be attractive to the next generation of entrepreneurs who will be at the heart of the UK's knowledge economy).

Regeneration benefits of an environmental nature could include the provision of combined heat and power systems (with all their associated sustainability benefits) in an LABV project.

Interventions

LABV partnerships have varied in their interventions from place to place. For example in the North East the RDA invested all of its industrial estates in order to draw on the management and marketing expertise of the private sector.

One of the more recent LABVs to be formed is between Bournemouth Borough Council and Morgan Sindall Investments and is particularly interesting for the concentration of town centre development sites made available to the vehicle. The 'Bournemouth Development Company' is described on its own website as 'a public-private partnership established to deliver much of the Town Centre Vision through the development of Council-owned land. The company is owned jointly (50/50) by the Council and Morgan Sindall Investments Ltd and will be developing a number of sites around the Town Centre for a variety of uses, in line with the Council's planning policy'.

The Bournemouth LABV has four broad objectives that will frame the interventions it makes:

- Regeneration – to maximise the town's economic potential, kick-starting wider regeneration and enhancing Bournemouth as a place to live, work, visit and shop. The company aims to create a greater balance between the daytime and evening offer, driving demand for new homes and jobs and improving the appearance and connectivity of spaces through landscaping, signage and infrastructure projects.
- Design and standards – innovation and excellence in design and sustainability will characterise all projects delivered by The Bournemouth Development Company. The aim is to establish distinct identities for key parts of the

town and to deliver inclusive, diverse, safe and high quality public spaces which, through exemplar urban design, provide a sense of arrival. All development will celebrate and enhance the town's historic architectural style.

- Delivery – engaging closely with residents, stakeholders and businesses to ensure projects reflect local priorities. Sites will come forward for development within a phased timescale, and, whether it's commercial, residential or leisure, will respond quickly and positively to emerging market demand.
- Commercial – capturing profit through development to deliver an appropriate financial return to its partners. The Council intends to use its share of that profit to bring public space and infrastructure improvements.

Timescale and Developmental Trajectory

One of the key characteristics of LABVs is the long term approach they bring to the development and regeneration process with 25 years now typical of the length of partnership longevity with the ability to extend at the election of both parties.

Barriers and failures experienced

One of the key barriers is the investment in lengthy and costly processes to procure a partner at a time of uncertainty and financial austerity when the returns are difficult to quantify in advance. However it should be noted that this procurement criticism is in some respects unfair as a LABV procurement is typically for circa a dozen sites/projects and as such in many respects is highly efficient as a procurement approach.

Some criticism of the approach is grounded in the transfer of responsibility aspects for the delivery of certain services to a partnership vehicle, ie is regarded as outsourcing in some quarters

The lack of suitable private sector partners that match the broad financial, social and sustainability outcomes of the public sector is a challenge also. In operation there has been some criticism of the 'democratic' nature of the approach affecting speed of decision making.

Implications for practice elsewhere

There continues to be a degree of momentum in political quarters for the creative use of partnerships between the public and private sectors.

In Scotland, the government recently issued a discussion paper on the mechanisms available to support regeneration. Recognising that several councils had begun to explore the use of

LABVs, it noted: “We are aware that other councils are considering the feasibility of setting up a LABV to coordinate and manage delivery of economic development or to secure borrowing against assets held for use in other council activities. We are interested to hear from councils as plans develop.”

The Scottish Futures Trust has also recently commissioned research into the range of tools to inject further commercialism into the management of the public sector estate, and this includes the use of LABVs.

Earlier this year, the UK Treasury flagged up LABVs as but one of a number of alternative funding models for the provision of public infrastructure. “The Treasury should consult on the possibility of using other financial models, including the Regulatory Asset Base (RAB) and Local Asset backed vehicles (LABV), as a way of financing capital projects in competition or in preference to PFI.”

The recent criticism of PFI as a delivery model by the National Audit Office and the Commons Public Accounts Committee as a delivery model will lend further weight to any viable alternative, and bring LABVs, TIF, Regulated Asset Base and other ‘new’ models into sharper focus. The coalition government’s Local Growth White Paper (October 2010) flagged up several initiatives to decentralise the financial management and decision-making within local government while highlighting the pivotal role local authorities have in driving the pace of economic devel-

opment in their communities. It stated, “Key roles include...using their significant land assets to leverage private funding to support growth. In many places, opportunities to include other parts of the public estate exist.”

Further reading and resources

CCURV – The Croydon Council LABV – [\(Here\)](#) The Croydon Urban Regeneration Vehicle is a 28-year exclusive partnership between Croydon Council and John Laing to regenerate a range of key sites across Croydon borough. John Laing was appointed Preferred Developer in 2008 and as the earliest council led LABV in the UK has more details available on its dedicated website including annual reports. Work has commenced on its first project – a 240,000sf new central office scheme for the council as part of a major physical regeneration of the town centre.

Local Asset Backed Vehicles – [\(here\)](#) Success Story or Unproven Concept – a useful up to date overview of the methodology by RICS Public Sector Publications.

Section 6

Meanwhile uses

See also our main Meanwhile Uses: Review Paper 2

Location, Scale and Context

‘Meanwhile Use’ is the temporary use of vacant buildings or land for a socially beneficial purpose until such a time that they can be brought back into commercial use again. It makes practical use of the ‘pauses’ in property processes, giving the space over to uses that can contribute to quality of life and better places whilst the search for a commercial use is ongoing.

During this world wide recession interest in the concept has grown around the world with exemplar case studies available in the UK and Australia. This case study seeks to draw on the best from both countries approaches.

Hunter Street Mall, Newcastle, Before and After Renew’s intervention



Brixton Village before and after Space Makers Agency’s intervention

The Empty Shops Network estimate that there are literally ‘hundreds’ of meanwhile projects currently taking place in the UK.

Governance and Funding Structures

The core of a meanwhile use arrangement involves identifying and bringing together the landlord, leaseholder or property agent of an appropriate property with a community or voluntary organisation that wants to use it, and agreeing the terms of use. A model ‘Meanwhile Use Lease’ has been developed to simplify this process. It is designed to be a simple legal instrument to

make the process easier and to provide appropriate reassurance to both landlord and occupant

Three types of standard Meanwhile Lease have been developed:

- A Meanwhile Use Lease, to be used for direct lettings by a landlord to a temporary occupier
- A Meanwhile Use Intermediary Lease, to be used for lettings by a landlord to an intermediary, such as a local authority or voluntary body (this is particularly attractive where a local authority wants to promote a variety of short term uses)
- A Meanwhile Use Sublease for lettings by an intermediary to a temporary occupier.

The leases all follow the same format and are substantially on the same terms, with the addition of the right, in the intermediary lease, for the intermediary landlord to underlet the premises. They have all been drafted to be as user friendly as possible and avoid technical legal terms wherever possible so that they can be readily understood by those that are unaccustomed to commercial lettings.

Problems Targeted

Many meanwhile projects have come out of a frustration with more traditional approaches to regeneration and development (typically demolishing and rebuilding) that have become unviable in the current economic crisis.

For example, in Newcastle Australia, 150 empty buildings on the city's former two main streets lay empty and as a result of the tax and financing system there was no incentive for private sector owners to do anything with them. Empty properties on this scale had led to a range of community issues, lack of social cohesion, graffiti, violence and a general anger and loss of pride by the community that this had been allowed to happen.

A fresh perspective was required and delivered via Renew who realised it was an issue of 'software rather than hardware' (ie the building uses as opposed to the bricks and mortar). With Renew acting as an intermediary this malaise has been turned into an asset of 50+ community groups concentrated in one part of the city, translating into benefits for the community groups as occupiers; a safer centre and the return to Newcastle of a sense of community pride in the place.

Interventions

Renew summarise their approach succinctly as:

1. Work with property owners

-
2. 'Borrow' the buildings
 3. License the buildings (on rolling 30 day licences to ensure there is no opportunity cost for owner if someone wants to move in on commercial terms)
 4. Find community or arts group to occupy and incubate their own organisations (ie galleries, food co-ops, arts, etc)
 5. Grow viable businesses for the area and brings life and interest back to the centre

These interventions lead to a range of benefits accruing across the stakeholder groups involved. The owners of property or land which is vacant or unused, even for short periods of time, usually incur costs during those periods – whether it is business rates on empty space, ongoing buildings insurance, or the maintenance and security costs of protecting sites. Together with the 'opportunity cost' of the lost income stream from the property being out of use, it means that there is nearly always a very real cost to 'doing nothing'. The core advantage of a meanwhile use for property owners (or the leaseholders letting out the space) is that it can remove some of the costs of 'doing nothing' with a relatively simple process that is also designed to limit any risks to the owners.

Benefits to the property owners;

- the security of active occupation;

- lower costs during vacant periods – during most meanwhile uses, utility bills, security and insurance costs will be covered by the occupiers;
- increased prospect of future commercial use – meanwhile use often increases the level of awareness of the property to prospective tenants or owners, particularly if it provides a home for an eye-catching project;

Benefits to community groups and occupiers –

- the principal occupiers of meanwhile spaces are small, local charities, community groups or social enterprises who want to make use of low cost (or no cost) space to promote their aims. There are many advantages to meanwhile use for such groups: low cost, low commitment space; high profile; space for innovation and growth;

Wider public benefits

- accruing to the wider community, neighbouring properties, future generations and society more generally including maintaining the upkeep and visual appearance of the area, attracting visitors, preventing blight, making community services more accessible and strengthening the third sector.

Timescale and Developmental Trajectory

One of the biggest attractions of meanwhile as a strategy is that it is very low cost and very quick to implement. Results start to be seen in months or even weeks rather than the years and decades taken for physical development.

Barriers and failures experienced

Given the all round benefits of this approach, failures are rare. The only barriers are convincing sceptical landlords that their precious investments are safe with 'alternative' arts and community groups. This can usually be handled quite easily by arranging for the local authority or a similar organization acting as an 'intermediary' to broker the relationships and give landlords a greater sense of security.

Implications for practice elsewhere

This approach is accessible to all towns and cities that are experiencing empty buildings – particularly in failing high streets and town centres. According to Renew's founder Marcus Westbury there are 4 key principles:

- Lower barriers to entry for people with interesting ideas to do them
- Don't plan too much – just try things.
- Passion

- Liabilities are opportunities

Further reading and resources

The Meanwhile Project ([here](#)) is a dedicated initiative set up to support meanwhile activity, led by the Development Trusts Association and Meanwhile Space. Its recently launched Meanwhile Project website provides a wealth of information and tools to facilitate the uptake of meanwhile use.

Renew Australia ([here](#)) similarly has a wealth of free information and downloads for aspiring meanwhile turn around projects.

An excellent video introduction ([here](#)) to the whole concept of Meanwhile is provided by the founder of Renew – Marcus Westbury – on Youtube

Melbourne

From Industrial City to Eco-Urbanity

How do you go from 'An empty useless city centre' (local news paper The Age commenting on its own city in 1978) to 'the world's most liveable city' as measured by the Economist?

And at the same time halve domestic and non-domestic rates payable?

It sounds like a politician and city dwellers dream and it sounds impossible. However its' been done and the only real question is why are the approaches adopted by Melbourne in its astonishing city making and retrofitting performance of the past twenty years not more widely appreciated and copied?

Exemplars of town and city centres that have turned themselves around are useful if for nothing else than inspiration and confirmation that it can be done. Particularly interesting are the ones that have relied on working with the existing grain of their place (as opposed to large scale demolition) such as Melbourne. Against common conceptions Melbourne does not rely on especially superior weather, but instead relies on careful management of the public realm; re-introduction of active ground floor uses wherever possible; promotion of entrepreneu-

rial small/medium sized food and other leisure uses; arts and culture in the centre; and catalysing major investment in city centre residential accommodation.

Governance and Funding Structures

The turning point for Melbourne came in the 1980s when its citizens spoke out about the slow destruction of their city. Inappropriate international style developments, the invasion of the automobile, destruction of heritage areas and the decline of the central city saw new political forces emerge at both a State and Local Government level. Their success at the polls allowed them to reset the agenda for Melbourne. A simple vision to transform Melbourne's ailing central business district into a central activities district while retaining the physical characteristics that made it distinctively Melbourne was adopted and incrementally implemented over twenty years.

Since the 1980s both State and Local Government have pursued a strong city improvement agenda and while both levels have not always appeared to move in unison, the reality is that there has been a high level of co-operation.

Problems Targeted

The principle problem in Melbourne was – as stated above – its empty and useless city centre. The challenges were enormous and far ranging and are in essence the reverse of the interventions set out in some detail below.

Interventions

The State and City Authorities created a joint vision to improve Melbourne's relationship with the Yarra River, shared planning powers and partnership control on key projects. Specific principles underpinning these projects include:

Design

Design philosophy was outlined in the 1985 Plan was modest and simple, reflecting the limited resources available to the City at this time. It called for the city to build on its existing strengths in a manner that reflected the local character and for the proactive increase of uses within the central city, in particular turning it from a central business district into a central 'activities' district.

This was achieved by reintroducing residential to the centre. The existing strengths or physical patterns were identified in the strategy plan and later elaborated upon in a 'Grids and Greenery' plan published in 1987 and provided a vision for the future of Melbourne. It told the story of Melbourne's urbanisation, laid

down generic urban design principles, and defined elements and relationships that characterise central Melbourne. It described city form in terms that Melburnians recognize and understood, showing how simple things like streets and boulevards, waterways, parks, transport infrastructure, the city centre and built form heritage interact to create familiar yet distinctive city features.

Many examples of the incremental approach to the improvement of the city's physical patterns, are recorded in the 'Places for People' document produced by the City of Melbourne and Gehl Architects in 2004.

Density

There are many reasons cities will need to increase their densities. To reduce the consumption of land needed for other uses such as agriculture, to reduce travel distances, mitigate the cost of expensive infrastructure, to maximize casual knowledge transfer and skills, to improve safety through passive surveillance, to enhance vitality and to promote viable public transport. Melbourne, like many post industrial cities, suffered from very low densities and in the case of the central city, a lack of any significant residential population. Since the 1980s a number of strategies have been used to help increase the densities down town.

By far the most successful was the introduction of 'Postcode 3000, designed to reintroduce a residential population into the central city. Using a suite of incentives such as changed regulations, financial assistance, improved street level environments and promotion, the city managed to reintroduce over 30,000 residential units in just over 15 years. This program not only saw the reuse of existing under-utilized building stock but also saw the redevelopment of under-utilized land close to the central core, such as the Docklands.

This successful program has now been adopted by the State Government in its Metropolitan Strategy 2030 where distributed Activity Centres, based on rapid transport routes, are being encouraged to follow a similar approach and thus form local, more easily accessible centres for their surrounding suburbs.

Mixed Use

Mixed use is seen as one of the cornerstones to healthy, vibrant and sustainable communities. Benefits include their potential to provide a local skills base, to optimise the use of public infrastructure such as parking (due to temporal differences on demand), to increase the viability of local busi-



nesses, to reduce dependency on cars, to provide convenience, to increase personal safety and to promote walking.

Central Melbourne was by the 1980s becoming increasingly mono-functional. Retail was on the decline and lost to the suburban shopping malls, residential was almost nonexistent with only 700 central city dwellings by 1992, and entertainment and leisure activities were on the decline with many of the old theatres closed or closing. In 1985 the Council symbolically changed the name of the Central Business District to the Central Activities District and commenced a program of encouraging the greater diversification of the centre. Alongside the successful Postcode 3000 program, the city developed Retail, and Events Strategies. The combination of all these strategies produced a catalytic response to inner city vitality that saw 1500 new bars, cafes and restaurants, numerous supermarkets and 400 sidewalk cafes open up down town. This achieved one of the City's key objectives of turning down town from a central business district into a central activities district.

One of the most successful programs was the city's arts and cultural program. This diverse program looked to sponsor arts and culture over the widest possible spectrum. The City of Melbourne has the largest arts program of any local government in Australia. It recognised very early on the importance of 'the creative culture' in stimulating the revival of cities. Other pro-

grams included the traditionally successful festivals and sporting activities.

Connectivity

Connectivity is the glue that holds a city together. Where connectivity fails, cities start to fall apart, barriers are formed and neighbourhoods become dysfunctional, disconnected and often hostile to their users. By contrast good connectivity promotes improved access to local facilities, free movement within and out of the city. It improves land values, reduces vehicle emissions, encourages walking, improves natural surveillance, and provides greater choice of movement.

Melbourne in 1985 had many of the characteristics of a car dominated city. The first major improvement was to build an underground loop that provided three new underground stations. To complement this program the city in the 1980s embarked on a process of gradual pedestrianisation of the central city with the aim of redressing the imbalance between the motor car, public transport and the pedestrian.

The expansion of footpaths and the restriction on cars in key streets has slowly seen an increase of more than double the pedestrian numbers along with the removal of hectares of asphalt from the central city. This, combined with quality pavement finishes; tree planting, and distinctive street furniture, has seen Melbourne's streets achieve a new level of sophistication. More

recently, the city has introduced an extensive network of bicycle links that have brought a rapid increase in the number of cyclists.

High Quality Public Realm

One of the casualties of our modern cities has been the quality of the public realm with a focus on the building rather than the place has resulted in a loss of understanding in the most important public space in our cities, our street space.



The space between buildings has become left over space, poorly designed, seldom activated by adjacent uses and often dominated by the car. Belatedly, advocates for the public realm in the form of Jane Jacobs, Jan Gehl and others have recognised the importance of the public realm. A high quality public realm attracts people and activities, increases economic performance, encourages new forms of street activity, increases the pride of the community, and improves the potential for social engagement and cultural activities.

Melbourne by the 1980s was seeing a gradual reduction in the quality of its public realm. Buildings were being set back from street alignments, blank walls were fronting footpaths, footpaths were being eroded and the general level of care and maintenance was poor. Recognising the problem, the city established an urban design unit and gave it control over the quality of the public realm.

This small unit commenced a program to improve the physical amenity of the city; streetscape plans dealing with street tree plantings and open space were produced. A typical example would be the central city tree planting strategy, which, when combined with Bluestone Paving, streetlights and other street furniture, combine to give Melbourne's streets their distinctive character.

Working closely with the City's Statutory Planners, simple principles of requiring all new developments to build up to the property line and provide 75 per cent active frontage, have slowly seen the return of quality streetscapes which contribute to the amenity and vitality of the city's public realm. These incremental changes applied through the development control process are highly effective but often neglected by city authorities.

The 'Melbourne Lanes' have been a key part of driving success and creating the right 'vibe' at ground level. These alleys - used until recently for no more than garbage storage - have been re-introduced as intimate, human scale 'eatery corridors' under-

pinned by the authenticity provided by re-fitting or retro-fitting existing buildings rather than whole scale clearance and demolition.

Timescale and Developmental Trajectory

It takes decades to turn around a piece of city as large as Melbourne which serves a conurbation of 3m people. Most fail. The fact that Melbourne went from 'empty and useless' to the world's #1 in 20 years is astonishing.

Barriers and failures experienced

In any program as broad ranging as a city centre turnaround there are clearly going to be isolated pockets of failure. Perhaps in Melbourne some of the new developments on the dockside are not maintaining the quality and successes seen in other parts of the centre.

Implications for practice elsewhere

Clearly Melbourne is one of the important case studies of how a city can take control of its destiny and plot a course for the 21st century.

The factors outlined above, are the major components for achieving liveability, and the key drivers for sustainability and economic viability. As the central city has increased densities, encouraged a greater range of mixed uses, built on its local

character, improved connectivity and access for pedestrians, bicycles, and public transport, and developed a high quality public realm, it has become more financially viable and started to reduce its environmental footprint. Local rates and taxes have declined by over 50%.

The success of Melbourne over the last twenty years has been through its ability to set a clear vision with ambitious but achievable targets. Where other cities have produced high quality documents Melbourne has managed to achieve a high quality implementation program. Using a strong tradition of in-house professional skills in all aspects of its administration it has mastered the art of successful partnerships and directed the resources of other levels of government and the private sector towards its vision.

It has successfully brought on board key partners in the financing and ongoing maintenance of these projects. It has recognized the need for quality design and delivery and the importance of remaining a leader rather than just a manager in the art of city making. Its projects have received over 80 Awards from the Architects, Landscape Architects and Planning Institutes and its views and opinions have been sought both locally and internationally.

Further reading and resources

- Melbourne - From Industrial Cities to Eco-Urbanity, Prof. Rob Adams AM, Director Design and Urban Environment, City of Melbourne

Places for People' [\(here\)](#) document produced by Gehl Architects

Residential Densification

Vancouver

Location, Scale and Context

‘Downtown residential’ was and is the mantra for urban vitality in Vancouver as a response to failing city centre offices and the questionable growth of suburbia in North America resulting in many city centres being in deep trouble. Seducing people back to the centre was seen as a solution and so has been proven over two decades of transformation and the creation of a world class model of how people in this fast urbanising world can live closely together, comfortably.

The underlying theme in Vancouver’s strategy is to bring out the competitive advantages of the urban lifestyle in preference to a suburban lifestyle. To truly make the residential city a reality, the city must succeed at the intuitive level of lifestyle choice.

Clearly the circumstances of Canadian and European towns and cities are very different. However the determinants for housing choice are not all that different. Vancouver is fortunate to sit in a spectacular setting of water and mountains and with a regional population of c. 2m, it is Canada’s third-largest metropolis. The whole city has experienced explosive growth since mid-century – first with the office boom that hit most North American cities, then with a diversifying knowledge-based econ-

omy and tourism. The centre of the city has constrained site potential and limited access coupled with very high amenities to support growth which has led to intensive, high-rise, high-density development.

Demographically there are increasing numbers of dual-income and dual-professional households, couples marrying and having children later, many alternative households, and a wave of empty nesters with strong assets. Moreover, many immigrants come from older cities, are fairly wealthy, and have little interest in the single-family lifestyle.

Governance and Funding Structures

City leaders understood that for the city’s housing vision to be realised there had to be a revamp of the regulatory and planning process. The traditional approach to planning and managing growth was completely inadequate and new tools and techniques were developed with the private sector, resulting in an arrangement called cooperative planning, a way for staff, politicians, developers, and citizens to interact positively, as each does their part to invent the future residential city.

This approach is based on a flexible regulatory framework, with emphasis on guidelines and incentives rather than hard regulations. This enables ongoing learning and innovation with the planning process going from large-scale and conceptual to spe-

cifics in stages. Building consensus is an ongoing effort, and issues are aired and resolved early on with public consultation at every stage and the public and private sector joining forces around a table for the actual design exercise. The result is that most citizens seem satisfied with the results.

The city has drawn a flood of investment that has kept its economy strong. Local planners have learnt how to design and manage high-density housing/neighborhoods and the city has leveraged public goods/amenities that support growth and enabled its dream for an urban lifestyle that will draw people back from the suburbs.

The costs for public utilities and facilities has been borne primarily by private sector development, ie the city avoided burdening the existing taxpayer with the costs of this growth and avoided a taxpayers' revolt, that would have closed the door on housing growth.

Problems Targeted

In its 1960s and 1970s growth, Vancouver had commenced a tradition of close-in living on and near the 'Downtown'. However by the 1980s growth was stalled for lack of properly zoned residential sites and the population gave signs of eroding. Vancouver's council took definitive action, creating a new Central Area Plan based on 'living first'. In a major stroke of rezoning, c8m square feet were converted from office capacity to allow residen-

tial development, with obsolete railyards along the waterfront earmarked for housing and an aggressive planning effort to make the future real.

Interventions

The numbers are telling, with over 20,000 people moving into the central area in 20 years. The policies that delivered this change was much more than just favouring housing and changing the zoning to allow it to happen. The principles of success extended to a holistic and integrated strategy that pushed for housing density, housing diversity, coherent and supportive neighborhoods and fostered a suitable urban design/architecture.

The basic principles of the Vancouver model for 'downtown' housing may be summarized as:

1. Limiting commuter access into downtown – i.e. using congestion to create dissatisfaction (a key element of successful 'change') and leveraging a household's decision to live downtown rather than in the suburbs. ie Vancouver does not have significant freeways (by North American standards) and thus the centre is not connected by freeways to growth areas at the edge.
2. Extending the 'fabric', patterns, and character of the existing city as opposed to allowing new areas to develop

in ways that make them distinctly different. For example extending the road grid, building morphology, materials, and even names.

3. A complete neighborhood 'unit' at a pedestrian scale – i.e. mixed use, local amenities, a local 'high street', and the essential 'third places' where people gather after work outside of their home to create the tangible society of their neighborhood.

4. A rich housing mix, i.e. market and affordable housing, mixed incomes, family and non-family households, plus houseboats and loft with a strong presumption against differentiated 'ghettos' that appear in so many other cities. A strong target is to bring security to low-income people who have long resided downtown.

5. Local local economic development – i.e. home, work, and services should be as close together as possible through mixed use of buildings, live/work, and fine-grained adjacencies among building uses and types.

6. High quality public realm to support community identity and social life, such as sidewalk beautification, street art, unique lighting and signage. Sidewalks were to be the 'neighbourhood living rooms'.

7. Open space and green linkages to bring both amenity and a positive image to each neighborhood with everything tied together by an outstanding walking and cycling system including the water's edge being dedicated to the public for recreational use and which has become Vancouver's single most popular civic initiative, now stretching over 20 kilometers, out from the core.



8. Solutions for the potential negative externalities such as noise, danger, over-viewing, invasion of privacy, and insensitivity to the needs of children – Vancouver's solution was to very carefully create a humane, domestic building form for high-density housing, which if poorly designed can be quite harsh for its residents.



9. Design standards –achieving good urban design at detailed levels so that the place, even though it is dense and complicated, will function well, and quite simply look very good. Vancouver embraced new urbanism returning to the traditional relationships between the street, pavement and building ‘wall’.

10. Using the higher densities to generate enough value for a development to carry quality materials, excellent amenities and contribute to a neighbourhood’s infrastructure.

11. Design guidelines enforced through zoning set the form, emphasising thin towers, small floor plates and the base of the tower typically hidden behind a three-story ‘human scale’ street wall which had the effect of making the tower disappear for pedestrians at street level.

12. Retail and other on-street uses are separated to reduce noise for residents and to bring housing right down to the sidewalk level.

13. Blank walls are not allowed at all, forcing the incorporation of doors, porches, stoops, windows, etc and other points of interest at ground level with sidewalks typically lined with grass boulevards and a double row of trees, (effectively ‘taming’ the harsh concrete).

14. Vehicular crossings of sidewalks are minimized, individual garage doors are banned vehicular entrances into interior courtyards are kept at a bare minimum.

15. Avoidance of under-utilised private plazas in favour of green public park spaces built into every building cluster.

16. Parking is largely underground except for the traditional short-term, curbside parking on local streets.

17. Views are carefully managed with sun access maximized.

18. High quality private courtyards, where residents can escape the action of the street for the privacy and quiet of their own little garden.

Timescale and Developmental Trajectory

The significant growth and improvement in quality of development and life in the downtown developments can be traced back to Vancouver Council’s definitive step in the 1980s to create a new Central Area Plan and in a single stroke rezoning c8m square from office to residential development. The numbers tell the whole story. The Central Area population has exploded since the late 1980s at 41,000 to about 61,000 in 2001 and projected to reach 90,000 by 2015.

Barriers and failures experienced

The barriers for other cities to adopt this approach might be the more modest land ownerships relative to Vancouver's City Council. Also Vancouver had the underpinning of a strong economy and is considered the 'gateway' to Asia with very significant inward investment from the Pacific.

Implications for practice elsewhere

In summary, Vancouver's aim has been to create city centre living that is as attractive for young singles as it is for families who usually decant to the 'burbs. The row-house initiative typifies this, providing solutions to parental concerns over children, dogs, fear of heights, preference for a private front door or garage, a need for basement storage etc.

Vancouver's downtown success has been to go beyond merely competing with its suburbs to facilitating a life experience generally more interesting and convenient, yet equally as safe and secure...going to the theatre, minutes' walk or cycle from great restaurants and shops, biking to work and connecting with all kinds of people For Vancouver, this has a powerful attraction for an ever-widening cross-section of citizens.

Further reading and resources

Downtown's Last Resort – [\(here\)](#), Trevor Boddy, August 2008.

Vancouverism – Ideas for Australian Cities, [\(here\)](#) September 2006, City Alliance, Gabrielle Kuiper

Implications for Wales



These case studies have provided a wealth of information on a range of projects delivered in very different contexts. This section explores the implications for Wales.

Implications for Wales

These case studies have demonstrated a wealth of possibilities in the search for regeneration methodologies. They point to innovation and inspiration as a means to release regenerative energies and create visions which inform practice. At the heart of each case study is an often straightforward and standard practice but one which is given a new twist or placed in a different context. Various these reflect some of our earlier conclusions and reinforce some of the implications of practice in the UK and beyond that we have identified earlier. In particular evidence from the case studies supports the case for:

- collaboration and partnership (Conclusion 5&6)
- creation of specialist delivery vehicles (Conclusion 17&19)
- The potential role of BIDS (Conclusion 20)
- The value of meanwhile uses for empty high street premises (Conclusion 22,23,24)

Furthermore, the case studies present compelling evidence for

- Retention of area-based approaches
- A clear role for the arts and creative industries
- Diversification of the high street

- The value of releasing the regenerative capacity of public sector land-holdings through LABVs
- The utilisation of sense of place and historical character to ensure that regeneration works with the 'existing grain' of a place
- Residential densification of town and city centres.

Conclusion 26: These strategies have been deployed with considerable success internationally and in the UK and whilst no single method can present a fool-proof prescription which will work in all instances, the learning that can be derived from constantly reviewing and understanding best-practice cannot be over-estimated.

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Evaluation of Current Practice in Relation to Town Centre Regeneration Case Studies Appendix 2

Report for:

Welsh Government

October 2012



in partnership with:

per Consulting
PLANNING ECONOMICS
REGENERATION



Key Contact:

Chris Jones

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Welsh Regeneration Area Case Studies

1 Aberystwyth – Developing the Destination



Summary of Key Learning Points and Implications for Practice Elsewhere

The case study shows that town centre regeneration is not just about physical regeneration but requires resources in terms of facilitating local partner between business, town stakeholders and strategic organisations. The snapshot framework through Purple Flag is a good management tool in terms of mapping assets, issues and opportunities and aligns activities to a common purpose.

The key challenge for Aberystwyth is how town centre management is resourced in future years and the way it should support the future shopping and visitor destination role in terms of business support, brand and promotion and events/activities development.

Location, Scale and Context

Aberystwyth town centre is situated on the western edge of the town bordered by Cardigan Bay. It is accessed from the south and east by A487 and A44. The town is situated on the confluence of the rivers Ystwyth and Rheidol. The town has a pier and seafront which stretches from Constitution Hill at the north end of the Promenade to the mouth of the harbour at the south, taking in two separate beach stretches divided by the castle. It is home to the National Library of Wales, the University of Wales as well as key administrative functions such as Welsh Government offices and Ceredigion County Council.

In terms of location and relationship to other centres, Swansea, to the south, is 70 miles away and Shrewsbury, in Shropshire, England, to the east, is 75 miles away.

Description of Governance and Funding Structures

The Aberystwyth Regeneration Partnership Board will consist of representatives of the Welsh Assembly Government, Ceredigion County Council, Tai Ceredigion, Hywel Dda NHS Trust, the National Library of Wales, Aberystwyth University, Dyfed-Powys Police and the private sector.

The Purple Flag Partnership comprises of Ceredigion County Council, Dyfed Powys Police Aberystwyth University, Aberystwyth Town Council, Aberystwyth Chamber of Commerce, Welsh Government, Coleg Ceredigion, Aberystwyth Guild of Students, Aberystwyth Pub Watch, Communities First and Menter Aberystwyth.

Welsh Government has committed £10.3m of regeneration funding to the first 3 years of the programme. Levered funding is expected from Ceredigion County Council, Aberystwyth University and from other local partners.

Pattern of Problems Targeted

The Regeneration Area Action Plan identifies a number of issues and concerns that town centre regeneration activity should address. These are:

- **Seafront and Promenade** – there is a need to maximise the opportunity if this seafront asset in terms of identity and the visitor experience;
- **Housing** – improvements to the quality of housing within the town centre
- **An Underdeveloped Retail and Leisure Offer** – loss of retail spend to other regional centres and a perception amongst residents that the range and choice is poor.
- **The leisure offer** is weak with no major attraction for visitors, especially during periods of poor weather.
- **Poor Physical Fabric and Urban Environment** particularly noticeable on the promenade and within the core retail area.
- **Major property holders within the town have relocated** to new premises on the outskirts.
- **Inadequate car parking provision** is a source of major concern and is stifling future development of the town centre as a shopping and tourist destination.
- **Poor public transport connectivity** exists within the town and between the town and its rural hinterland.

A key challenge for the town has also been the need to manage the University population (10,000 students) and to ensure the town provides a “sense of place” for residents, students and shoppers. This brings resultant pressures and needs in terms of town centre activity specifically in relation to the evening time economy which Aberystwyth has been addressing through the Purple Flag Standard in terms of managing the town in terms of pubs, bar, clubs and wider visitor economy needs. The need to recognise the importance of “Town and Gown” within the town is a priority for Aberystwyth in terms of day and night time activity across the town centre.

Description of Interventions

The range of interventions being delivered through the Aberystwyth model is led delivered directly by the Regeneration Area partnership and partners in terms of larger physical regeneration initiatives. At a local level a variety of town centre management activities that have centred on the evening time economy have been led by Ceredigion County Council and the Purple Flag working group.

Purple Flag Approach

The approach to managing the evening time economy in Aberystwyth has been accredited with a Home Office/ATCM/Diigo Purple Flag status in terms of how it has developed the well-being, movement, its appeal and developed it as a place. The process and local partnership is resourced by a Night Time Economy officer, which is funded by the University, Town Council and Ceredigion County Council.



The approach has brought together a framework of activity that is performance based with the overall aim of “working together to provide a safe, beautiful and vibrant Town with something for everyone. A number of initiatives have taken place that supports this vision including:

- Well being
 - NTE (Night Time Economy)(Aber@Night) joint patrols;
 - Health improvement campaigns such as developing customer care through Best Bar None (BBN), Behave or Be Banned (BOBB), Safer Drinking booklets, Pubwatch and noise awareness campaigns such as Sshhh;
 - A student living guide has been developed;
 - Noise abatement linked to the NTE scheme;
 - Pubwatch partnership which links to BOBB and BBN, with.
- Movement
 - The creation of an additional taxi rank at the top of town;
 - SIA door staff are able to undertake the recognised SIA Door Supervisors“ Course at the local college (Coleg Ceredigion);
 - Improvement and creation of foot and cycle paths;
 - Modifications to all footpaths ensuring suitability for the disabled and pushchair users;
 - Agreement to increase train service to hourly instead of two hourly;
 - Agreement to regeneration of Bus and Railway stations.
- Appeal
 - Later opening cafes;
 - Town and Gown links strengthened by Public Talks and initiatives;
 - Provision of farmers’ markets;
 - Renovation (repainting) of signs and benches;
 - Town Improvement Grant allocation of £600,000 to the improvement of buildings in town;
 - Successful consultation from Welsh Government to Public Meetings regarding the Promenade, Bandstand and Railway renovations;
 - The programme of activity has looked at development of events such as:
 - Food and Drink festival
 - Pride in the Prom
 - Christmas lights switch on



- The Halfords Tour Bike Race and
- The Ffoto Aber Photography competition.
- At a street level, integrated signage and information points and QR code technology in Tourist Information Centres has been developed, amongst other measures.
- Place
 - Refurbishment of the blue and gold signs;
 - Aberystwyth flagpole and banners on the promenade;
 - Town Improvement Grant work;
 - Refurbishment of Cliff Railway Restaurant and buildings;
 - QR code technology at the Tourist Information Centre;
 - Introduction of a Rivers to the Sea seating at the Harbour.

The purple flag accreditation process has provided the framework to bring together individual initiatives and projects into one place. It has helped develop partnerships, business engagement and helped in terms of improving the quality of the town centre product and experience for its users.

It has been led by a Night Time Economy approach and it is clear to see that the Night Time Economy officer has aligned other complementary projects and initiatives in terms of looking at the total place approach for the town centre. It clearly shows that strategic and local partners are all developing and delivering town centre related activities which the Aberystwyth Regeneration Area partnership is managing at a strategic level in terms of its programme.

There is however recognition that in taking the town centre forward a wider town centre management function is required that is integrated between physical activities, the wider marketing and promotion of the town and developing its sense of place.

Physical Regeneration

The Aberystwyth Regeneration Area Partnership has a number of keynote projects that working towards making the town centre attractive and thriving, making the seafront and promenade vibrant and ensuring sustainable travel. Key projects that currently underway include:

- Design study for promenade and seafront completed; need to consider delivery in terms of ownerships as well as integration with housing renewal works; Completion of the improvement works to the frontage of Aberystwyth Train Station so that an interchange to improve transport and an enhanced gateway to the region with a new sense of arrival is achieved;

- Delivery of other public realm improvements such as the Town Clock area and other key spaces;
- Further support for the property improvement programme including the Market Hall;
- To improve the physical appearance of the environment along key shopping streets;
- The delivery of the Mill Street development site for a Tesco and Marks and Spencer;
- Further development of events within the town that uses assets and spaces;

These projects are at various stages of development and it implemented within the current Regeneration Area programme they are working towards creating a connected, distinct and accessible town centre environment that appeals to shoppers, visitors and its student population.

The key challenge is to develop a town centre management function that envelopes the physical regeneration projects and ensures a consistent product across the town centre.

Key Successes

The attainment of the Purple Flag standard demonstrates that a holistic and innovative approach to how we manage town centres in terms of customer care, quality standards and aligning existing resources can lead to a focussed approach and addressing a range of anti-social behaviours in town centres. The future challenge is to maintain this approach and for strategic and local partners to understand how town centre management needs to evolve in terms of existing regeneration interventions and wider town centre visitor/destination management.

Timescales and Developmental Trajectory

The range of town centre regeneration activities shows that strategic and local activities are converging towards the same vision and objectives. The key objective is to consider the organisational structure of how Aberystwyth as a town centre is to be managed in terms of co-ordinating existing partner expertise, skills and activities.

The town centre has a unique setting and with transport improvements and enhancement of key public spaces, streets and assets it should be able to realise its potential as a key shopping and tourism destination in mid Wales.



2 Bargoed Big Idea



Summary of Key Learning Points and Implications for Practice elsewhere

The Big Idea in Bargoed demonstrates the strategic nature of planning change within a community that has faced major structural changes in its industry and identity. The need to develop a place through transport, connectivity and re-positioning itself in terms of both physical outlook and setting is key to how you plan phases of work that tackle physical barriers and challenges. The approach has also put in place a wider strategic resource to manage the change through town centre management so that existing businesses and new investors are cared for.

The programme of investment also shows how strategic partners can unlock opportunity with the Morrisons scheme a good example of a joint partnership between Welsh Government and the local authority in ensuring an integrated scheme that will have direct linkage with the fabric of the town, thereby ensuring additional benefits for existing businesses as well as re-enforcing as a District shopping centre.

Location, Scale and Context

Bargoed is situated in the County Borough of Caerphilly being the third largest town. It is a key district centre and covers a catchment area of 26,000 residents including the residents of Rhymney, Fochriw, Pontlottyn, Abertyswg, Deri, New Tredegar, Aberbargoed and Gilfach.

The town is situated off the A469 which connects with the A468 and the M4 to the south. Whilst road improvements have occurred over the years, Bargoed has an inner valley location and faces the challenges of competition from local centres such as Blackwood and Caerphilly, in addition to Cardiff, due to travel to work patterns as well as other shopping and leisure related trip.

Description of Governance and Funding Structures

The Big Idea project is managed by Caerphilly County Borough Council. On the capital project delivery side this is managed by the urban renewal team with support from in-house services in terms of engineering, property and design. The town centre management (TCM) group meets on a quarterly basis and comprises local members, town centre stakeholders which includes the local retail group, residents group, local police inspector with an officer group supporting the process.

The Bargoed TCM group is chaired by the local ward member. Within the Council there is an operational group that meets once every eight weeks with representation an officer level from planning, economic development, transport, trading standards and environmental health. The group responds to town centre environmental audits with the respective town centres seen as “shop windows” and have a priority rating in terms of response time.

Funding totalled £56m up to 2009 for the wide range of mainly physical regeneration

projects. These have been mainly financed by Caerphilly County Borough Council, Welsh Government (DET, Cadw, Communities First and Heads of the Valleys Programme) and United Welsh Housing as well as private sector leverage. An additional £22m of expenditure is planned for the current phase of work in terms of the mixed use development scheme.

Pattern of Problems Targeted

The gradual decline in the local economy through the loss of traditional industry and the growth of more accessible centres such as Cardiff led to Bargoed have problems around accessibility, traffic management, retail leakage and general lack of direction.

In terms of building evidence Caerphilly CBC looked at the shopping habits of the area mainly around food and convenience shopping with figures for 1994 showing 22% of the catchment population undertook their food shopping in Bargoed. In 2009 as part of the Bargoed Town Action Plan document, the 2006 retail survey was reviewed which identified the following headline results:

- The proportion of the catchment area buying their weekly convenience goods in Bargoed has fallen consistently from 22% in 1994 to 12% in 2000 and only 0.8% in 2006¹.
- Bargoed maintained its modest share of non-food trade (between 10 and 13%) from 1994 to 2003 but by 2006 this too, had slumped, to 8%
- The proportion of residents regarding the town centre "favourably" declined steadily from 39% in 1994 to 20% in 2000 before reviving slightly to 26 % in 2003. Even so, this was by far the lowest approval rating of the six town centres in the county borough (the next lowest was 56% whilst the highest was 80%). In the 2006 survey, however, the popularity of the town centre hit a new low of 13%.
- 49% of persons interviewed in the town centre had arrived on foot - by far the greatest proportion of any of the six centres, while the proportion arriving by car or van was 30% - low compared to other centres.
- Despite its location on a railway line, only 2% had arrived by train, compared to 16% by bus.

The data was clearly starting to show that shoppers were choosing to shop in new retail developments within Caerphilly and outside of the County Borough. This had a subsequent knock-on effect on other linked trips within the town centre which was eroding the wider retail and local services provision. The Council continues to undertake an annual retail survey every three years which has provided a comprehensive set of data for pre and post intervention evaluation.

Description of Interventions

Whilst this case study focuses on current town centre regeneration interventions, it is important to note the long history of activity and investment, with the following milestones noted:

¹ The survey took place just after the closure of the Kwik Save store and before the opening of the foodstore that replaced it. That undoubtedly accounts for the almost complete absence of convenience trade in the town

- 1994-2000 (in three phases) the £14 million Bargoed Colliery Reclamation Scheme funded by the Welsh Development Agency. This removed the colliery buildings and spoil tip and created the landform for a relief road and new development.
- Commercial Improvement Grants to shop fronts in the town centre. From 1987 to 2005 113 improvement grants totalling £873,296 were implemented.
- 1999 - The Bargoed town centre Northern Car Park scheme, which provided a high quality enhanced 170 space car park.
- 2000 - Bargoed northern railway station enhancement, including a new disabled lift/bridge across the railway lines plus a taxi rank and environmental enhancements.
- In 2004 a Town Centre Development Manager was appointed for the principal main towns in the county borough, including Bargoed.
- 2004 onwards - Following the appointment of the Town Centre Development Manager, a programme of annual events has been initiated including 'Bargoed Big Bed' and 'Bargoed Big Screen'. In addition a new town centre 'brand' was developed, 'Bargoed's Big Idea' which has been successfully rolled out across a number of different marketing platforms including; lamppost banners, window stickers and a 'Windows Of Opportunity' document.
- In 2005 The Council and the WDA employed consultants Camlin Lonsdale to study the regeneration potential of the town centre. Their proposals included a radical and spectacular proposal for demolition of town centre properties, including the library and their replacement by a huge multi-level mixed use development. This aspect of the plan was subsequently approved by the Council
- In 2006 the Council started acquiring 13 properties required to be demolished to allow the ambitious retail redevelopment scheme to go ahead with the help of a grant from the Heads of the Valleys Programme.
- In 2007 work finally commenced on the two-year construction programme for the relief road, to be named 'Angel Way'. The scheme, significantly titled 'The Greater Bargoed Community Regeneration Scheme' includes spectacular structures bridging the river Rhydney and the railway line.
- 2007 & 2008 With support from the Heads of the Valleys Programme, housing associations have acquired run down properties in the town centre for renewal and new uses, including the relocated health facilities and town library, which are being facilitated by the United Welsh Housing Association.
- In late 2008 the conversion of the former job centre into a new home for the town's health centre was completed and the health facilities were able to relocate from the old library building.
- November 2008 also saw the opening of 90% of the Angel Way relief road.

The approach to regeneration has been about an opportunity led approach not problem led with the Big Idea project not about a complex vision but about bringing about community change, drip feeding ideas and activity over an incremental period but having a town centre focus. It is also based on approximately £50 million of investment upto 2009, which has

formed a strong foundation and legacy investment that has gradually re-engineered the physical characteristics of the town and its location. The Big Idea has therefore been in response to the town being let down with the emphasis on dovetailing old and new and turning the town around so that it faces outwards into the valley.

Since 2009 a number of major projects have taken the Big Idea project to its current phase of delivery are:

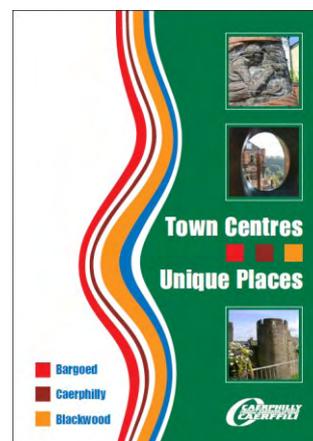
1. The provision of a Morrisons food store that is well linked to the town centre through the creation of a 2.2 hectare 'Retail Plateau' for development in the south of the town centre, with the 'Preferred Developer' approved for the scheme in 2008;

This project has centred on the provision of an anchor food store which the Angel Way relief road has unlocked through Welsh Government investment in 2008. Smart planning has seen 150,000 tonnes of material moved during the relief road works to help build the plateau which reduced longer vehicle movement times and was sustainable in terms of re-use and cost.



In 2007/08 with the support of the Heads of the Valleys Programme team, the Council acquired a number of key properties with consultant studies re-enforcing the need to create a Tuscan type town wall and plateau and links to the main shopping street. The plateau was built in 2009 with the developer Simons appointed in 2008. The mixed use development centres on a foodstore, car park and restaurant planned for Phase 2 of the Plateau development.

2. The closure of Woolworths in Bargoed was seen as a real "body blow" to the town with a key objective to reoccupy the premise. The Heads of the Valleys Programme helped buy the building with the Original Factory Shop seen as an attractive retailer and anchoring the northern edge of the town centre, close to the bus station and interchange with the train station. This investment has also seen the Council co-locate its services here with the area emerging as a business quarter and broadening the economic base. The office sector is also seen to be supporting local eating places and the town seen as an employment centre as well as a place to shop and visit.



3. The town centre management post was introduced in 2004 with the main remit to develop close contact with retailers, identify holistic opportunities, marketing Bargoed and other Caerphilly towns to investors and local shoppers and develop some niche marketing of independent retailers. The town centre manager has led on a number of specific activities including:

- Management of town centre operational systems in terms of street scene and cleansing;
- Provision/maintenance of retail monitoring data for respective town centres;
- Provision of an on-line town centre property marketing site;
- Development of the Go2Bargoed business directory website;
- Support for town centre management structure, specifically the town centre management group with manager providing business support, event development and general liaison;
- Marketing and promotion activities:
 - Brand and logos
 - Visual street banners
 - Events – ice rink, spring fayre, big screen and community events

4. Public realm works are also seen as an essential part of the mix of regeneration activities as it sets a standard and helps to support attractive and lively town centres. Initial one way trials were conducted with the objective to widen pavements along Hanbury Road to improve accessibility for prams and wheel chairs and to also enable event based activity within the town centre.



These works extend into new links down to the public transport node as well as the library building also acting as a through route during opening hours.



Phase three of the public realm strategy is to link Gilfach Street with Hanbury Road which will create a distinct area for events and markets at a key southern gateway into the town centre.

5. The restoration and re-use of the grade 2 star listed Chapel was seen as a key opportunity in terms of the re-location of the library and using the building for a number of community users. The project was led by United Welsh housing with financial support from Cadw, the Heads of the Valleys Programme, other Welsh Government funding and the local authority.

The completed project now houses the library, church, resource centre, family history research, a café and a one stop shop for the Council. The design of the rear extension has also re-enforced the Big Idea's vision to project the town



outwards into the valley.

Key Successes.

In terms of Bargoed being located with the Heads of the Valleys Programme area, Caerphilly CBC saw this as a targeted opportunity as 4/5ths of the County Borough was not within the Regeneration area with the town seen as a key priority. Caerphilly CBC identified that the Heads of the Valleys Programme team had an “opportunistic culture” with a flexible approach to funding which helped the Council in purchasing the row of shops on Hanbury Road as a key frontage to the development site. This is seen as a key milestone in strengthening the vitality and viability of Bargoed and in ensuring the right development footprint and linkages to the existing retail and business offer.

The town centre management function is comprehensive in terms of its operational approach in managing the town centre environment and providing a toolkit of marketing and promotion devices that is targeting local, regional and national investors in addition to supporting local retail enterprise and developing events and activities within the town centre. There is a strong culture within the Council of performance management in terms of town centre monitoring and there is a sense of where they want Bargoed to be in terms of place and destination for local people and visitors.

Timescales and Developmental Trajectory

The Big Idea shows that regeneration is not about quick fixes with the investment taking place over 20 years ranging from land reclamation, commercial improvements, transport interchanges, major highway engineering, property acquisitions and refurbishment of key note buildings.

Town centre management has been introduced over the last five years as the key development site is now materializing in terms of construction. Whilst town centres constantly require improvements in their infrastructure, the Morrisons development and Hanbury Road frontage will be a key catalyst in retaining local food shopping and bring about linked trips due to its central location in Bargoed town centre.

The development should be a stimulus to other private landlords and investors and should attract other new retailers and complementary businesses. This will consolidate its role as a key district centre within Caerphilly County Borough.

3 Caernarvon - "Designs on Making a Good Town Great"



Caernarfon Town Centre and the Mon a Menai Regeneration Area

Summary of Key Learning Points and Implications for Practice Elsewhere

This case study presents Caernarfon as a 'town of opportunity' needing to find a way to balance its retail, administrative and tourism function. It portrays an holistic approach to town centre regeneration focused on improvements in public realm and heritage for their wider cultural, community and commercial value. The case study also provides important insights in to organisational and financial mechanisms necessary to sustain regeneration activity in the long-term through community enterprise. It highlights the value of performance monitoring as a management tool to help partners to track changes in town centre performance and community perceptions. Caernarfon is a good town for residents and businesses but has the potential to be a great town through further well-guided and sustainable investments.

Description of Interventions

As far back as the 1990's, a local authority-led master plan identified several key areas of development in and around Caernarfon town centre - the Victoria Dock area, Maes/town Square area and the Slate Quay/Waterfront area.

Since that time significant progress was made in the Victoria Dock area just beyond the walled towns that included the development of Galeri as an iconic creative arts and cultural centre in 2005. Subsequently, Victoria Dock benefited from significant private sector investment leading to the mixed use development from 2008 onwards.

In 2009 Gwynedd County Council led on public realm improvements on the Maes/Square that resulted in an iconic shared space concept providing a versatile area to undertake varied activities and events. The scheme received national plaudits typified by this commentary:

"Caernarvon's a pretty amazing town. The castle dominates one side of the town square, linking the commercial hub to the Menai Strait, and the city walls are intact, providing a strong physical and historic context for the town. The castle itself is also very impressive.

A few years ago, the town square was dominated by vehicular routes, and was looked tired and run-down. Enclosed on all sides and linking via four or five streets to surrounding areas

it's a location that deserved a full make-over, to breathe new life into the heart of the town. The recently completed public works have done just that.²

Through funding from Mon a Menai Regeneration Area, Gwynedd Council have subsequently delivered a Town Improvement Grant initiative that provides grants to commercial property owners to improve the external appearance of key properties. This has helped ensure that built environment within the walled town is pleasant and attractive for locals, visitors and tourists, although some notable properties remain in need of improvement.

Although significant consultation and assessment has been undertaken on the Waterfront as the third key regeneration site; the presence of significant physical constraints and compatible vision has to-date hampered any coherent development on the site.

Key Successes

One of the key successes of town centre regeneration to-date in Caernarfon is the way that it has been able to combine commercial, cultural and community interests in the way improvements are undertaken and managed. This is very important in a town with a strong local identity and an important place in the Welsh national heritage.

One of the key aspects of the holistic approach to regeneration taken in Caernarfon has been the role played by key stakeholder organisations including in particular the Welsh Government through CADW, Gwynedd County Council and Galeri Development Trust. Caernarfon Town Council and the Harbour Trust also have important parts to play in future.

In particular the Galeri development trust has provided a vehicle for the delivery, management and financial sustainability of key development projects that sustain the commercial, cultural and community commercial, cultural and community value of key town assets. Galeri Caernarfon Cyf (formerly known as Cwmni Tref Caernarfon Cyf) is a not-for-profit community enterprise operating as a Development Trust. The company was established in 1992 to “pursue social, economic and environmental projects for the benefit of the community in Caernarfon and its environs”.

Galeri is responsible for establishing and implementing numerous projects and schemes within the local community. In the early years, the company worked tirelessly to improve the image of Caernarfon town centre by the purchase, refurbishment and leasing of formerly derelict buildings (shops, offices and housing) within the walled town centre. This enterprising approach contributes to and captures some of the economic uplift from the wider regeneration of the town. To date, the Trust has refurbished and re-developed 19 previously vacant ‘eye sores’ within Caernarfon.

Most ambitiously, the trust has developed Galeri Creative Enterprise Centre as part of the wider regeneration of the town’s Victoria Dock. Galeri Creative Enterprise Centre was officially opened in April 2005 and includes: 394 seat theatre and cinema; 24 office units; Art Space; 2 large rehearsal studios; 3 smaller rehearsal rooms; meeting rooms and a cafe bar.

Currently Galeri is negotiating with CADW and the County Council to agree the sympathetic refurbishment and a lease for Porth Mawr. Also known as the East Gate or the Exchequer

² Urban Grit, 2010. Blog on *Caernarfon Town Square*. Available at: <http://urbangrit.wordpress.com/tag/caernarfon-castle/>

Gate, Porth Mawr was built at the same time as the Edwardian Caernarfon Castle and was the main land entrance to the historic town of Caernarfon. It is a scheduled ancient monument and a listed building that through lack of appropriate community use, has become neglected. CADW therefore recently invited expressions to develop the gatehouse in a way befitting its historic function and Galeri have been selected as development partners. Proposals are being submitted by Galeri for planning approval and scheduled monument consent for refurbishment works costing £867,000 and scheduled for over 2012-14.

The existence of Galeri in Caernarfon provides an excellent model that could be replicated in other towns as a viable way of working alongside other key stakeholders to ensure the sustainable development of key properties. An important part of this is not only the organisation's property development skills but the way the parent company provides cost effective management and administration whilst using revenue income to contribute to wider regeneration activity in the town.

Barriers to Progress and Failures

The approach to regeneration in Caernarfon has included gathering key performance indicators of the economic vitality of the town centre using amt-i's national benchmarking process. This helps Gwynedd Council and partners to track changes in town centre performance and community perceptions as regeneration progresses and enables comparisons with other towns. Importantly, the benchmarking helps understand the impacts of wider improvements on key stakeholders including shortcomings that they feel need to be addressed. Sample indicators of the function, trends and issues facing the regeneration of Caernarfon town centre are summarised in the table below.

Sample Indicator	Caernarfon	UK
Function		
% Independent retailers	54%	67%
Comparison: convenience retailers	70:30%	60:40%
% using town centre more than once per week	67%	69%
Length of visit (% staying in town centre less than 1 hour)	31%	34%
Trends		
Business vacancy rate	12%	9%
Footfall (busy & quiet days)	104	115 & 83
Business confidence (% reporting reduced turnover)	70%	44%
Issues		
Users perceptions (variety & quality of retail -poor or very poor)	78%	53%
Users perceptions (physical appearance of town centre -poor or very poor)	52%	26%
Users perceptions (leisure and cultural activities -poor or very poor)	63%	47%

Responses from businesses and town centre users as part of recent town centre 'benchmarking' surveys highlight the challenges in bringing local opinion along with changes and importance of balancing local and tourist needs. Whilst disruption without obvious direct benefits left 68% of businesses dissatisfied with recent public realm improvements and road layout changes, there was more of a mixed reaction from users who liked and disliked the new-look square in similar proportions but found the one-way traffic system

disruptive.

The survey of town centre users indicated that two thirds of users surveyed regularly visited the town centre and a high proportion work there. High levels of responses critical of the variety of shops and leisure/cultural activities in the town suggested that these people could not yet see social benefits from the recent physical improvements in the town centre.

The potential for attracting visitors was cited as an opportunity by both businesses and town centre users including making more of the harbour and areas around the castle and improving the connection to the Ffestiniog Railway temporary station in the town.

By using such information and analysis from the benchmarking surveys as a management tool, the approach to regeneration in Caernarfon town centre can be appropriately revised to overcome barriers and maximise the real and perceived benefits to businesses, the local community and visitors. Capturing additional community and cultural indicators would be useful in capturing the full impact of the holistic approach to regeneration in the town. In this way it will be possible to understand, account for and overcome an apparent disconnect between the holistic approach taken and some of the immediate concerns of stakeholders.

Timescales and Developmental Trajectory

Existing projects in the pipeline for Caernarfon continue the focus on physical renewal of properties to serve the cultural, community and commercial value of the town centre. Notable amongst these is recent approval by the Mon a Menai Regeneration Area Steering Group for funding to refurbish a redundant grade 2 listed building and convert into a base to support the professional development of young artists and designers. This will include allowing the local community to enjoy viewing, engaging with and participating in the arts.

The Waterfront is the missing piece in the long-term physical regeneration jigsaw for Caernarfon town centre and now a new approach is being proposed that seeks to work with land ownership and flood plain issues rather than to adopt a full scale clearance and redevelopment of the land. Underlying this new approach is an indicative timetable for a more 'organic' redevelopment over the next 5 years that shows a greater respect for the existing built and historic environment.

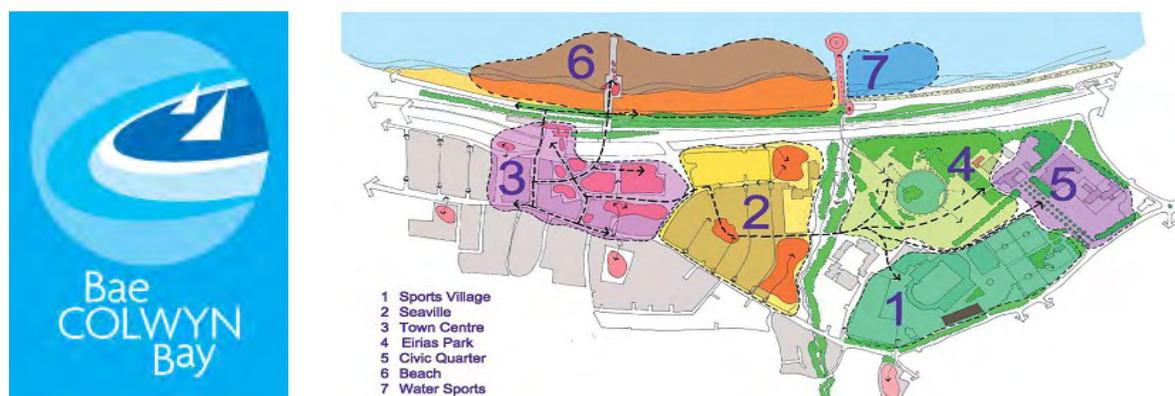
There is an opportunity to develop the Waterfront scheme with financial investment from the Welsh Government, through the Mon a Menai Regeneration Area, EU Heritage Tourism Project and Cadw in the first instance. Future financial support would need to be sought from EU Structural Funds post 2014, Heritage Lottery and private sector investment. Public capital investment being modest in the initial stages when the focus will be upon events, public engagement and design.

As important as the development brief and the funding arrangements for the Waterfront, is the opportunity to build on the successes of existing partnership working in the town. A wider partnership development team for the Waterfront could include Gwynedd Council, Welsh Highland Railway, Caernarfon Harbour Trust and Tourism Partnership North Wales. Other local interests will need to be engaged at the appropriate time and there should be a role for local events organisers like Galeri and the Arts Council of Wales as the initial events programme develops.

In pursuing the Waterfront scheme and wider regeneration of Caernarfon there is a lot to be learnt from the way that Galeri as a development trust as served as a delivery vehicle for a

wider partnership. The model of taking ownership of key properties as part of the holistic regeneration of a town offers a lot of advantages - not least in ensuring that there is a body with a long-term stake and revenue funding to help maintain the momentum. This perhaps more than the quality of the physical regeneration is a key learning point from this case study that should be pursued both amongst members of the Caernarfon Partnership and more widely in other Welsh towns.

4 Colwyn Bay - "Coordinated Delivery According to Plan"



Colwyn Bay, Bay Life+ & the North Wales Coast Special Regeneration Area

Summary of Key Learning Points and Implications for Practice Elsewhere

This case study shows the value of strategic planning, strong local leadership and an integrated mix of interventions in helping to revive the fortunes of a small town. By investing revenue resources in to the Bay Life+ project for Colwyn Bay; Conwy County Borough Council has been able to maximise opportunities to attract Regeneration Area investment and other external funding to deliver its vision and plan. This plan integrates the development of different locations and socio-economic themes across the town in a way that seeks to enhance the pivotal role of the town centre. Bay Life+ activities show an awareness of the dual importance of pump-priming capital investment and the necessary revenue streams necessary to make the most of these. The plans also show an appreciation of links to the wider economy and the need to complement the roles of neighbouring towns.

Location, Scale and Context

The origins, opportunities and systematic approach taken by the Bay Life+ programme as part of the wider North Wales Coast Regeneration Area, are clearly summarised in a development proposals document published by Conwy County Borough Council in 2009³.

These 2009 proposals defining the inter-relationship with the North Wales Coast Regeneration Area. They also set out how Colwyn Bay is the second largest urban settlement in North Wales and was until the late 1950s a prosperous community with thriving tourism and retail sectors. Since that time, the decline of the traditional seaside holiday and the construction of the A55 has undermined the viability and vitality of the town.

³ Conwy County Borough Council, 2009. *Delivering Bay Life: Development Proposals for Colwyn Bay and Bay Life Programme Board*. Available at: http://www.conwy.gov.uk/upload/public/attachments/446/Bay_Life_August_09.pdf

In 2005, the Welsh Index of Multiple Deprivation identified that parts of the town had declined to be amongst the 10% most deprived wards in Wales. As a result, two wards to the West End of town of the town were designated as part of the 'Communities First' programme; a Welsh Government initiative aimed at tackling poverty and disadvantage. At the same time Conwy County Borough Council identified Colwyn Bay as its regeneration priority and it clearly articulated regeneration priorities for the town as part of the Bay Life Development Plan 2007 – 2014.

This evident need and the clear focus shown by Conwy Council, in turn helped make the case to the Welsh Government to include Colwyn Bay and the surrounding areas in the Regeneration Area when it was designated in 2008. As such the original 'Bay Life' programme laid the foundations for the recent regeneration work in the town and its approach was integrated in to the wider North Wales Coast Action Plan published by the Welsh Government in 2009⁴, which recognised that Bay Life+ initiative's coordinated approach matched the Regeneration Area's aspirations to create:

"A thriving, attractive and vibrant area in which to live that is welcoming, safe and friendly - a place with unique character that supports balanced, permanent and self-assured communities within a prosperous and sustainable local economy".

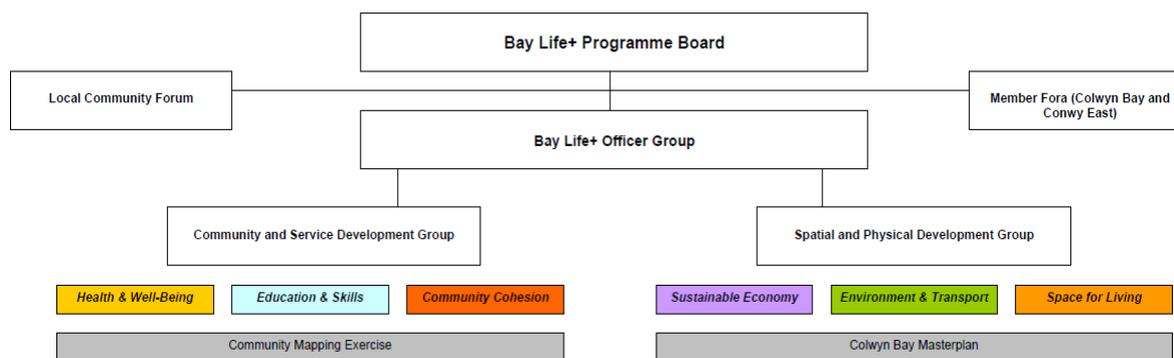
The Regeneration Area extends from Prestatyn in the east to Mochdre in the west and has a total population of around 100,000. It consists primarily of coastal communities linked by the A55 trunk route, the A547 coastal road and the North Wales mainline railway and is home to roughly 100,000 people. In Conwy, the designated Regeneration Area area extends to Kinnel Bay in the east.

Description of Governance and Funding Structures

From 2009, a re-launched Bay Life+ Programme covered the same geographical area in Conwy Borough as the newly North Wales Coast Regeneration Area. The Bay Life+ offices and staff are based in the centre of Colwyn Bay.

Conwy County Borough Council leads the Bay Life+ Programme, working with partner organisations such as Coleg Llandrillo, CVSC, North Wales Police, the National Zoo of Wales and with over 30 community groups and 200 businesses. The Bay Life+ Programme Board oversees an Officer's Group which in turn coordinates separate community and physical-regeneration development groups. A *Community Mapping Exercise* and *Colwyn Bay Masterplan* provide integrated blue prints for these respective areas of regeneration.

⁴ Welsh Assembly Government, 2009. *North Wales Coast 2016 Action Plan*. Available at: <http://wales.gov.uk/topics/businessandconomy/publications/northwalesactionplan2016/?lang=en>



The Bay Life+ Programme Board in turn reports to the North Wales Coast Regeneration Area Project Team and Partnerships Board which include representatives from Rhyl, Prestatyn, Denbighshire, the wider area and the Welsh Government.

Pattern of Problems Targeted

The Bay Life+ Programme seeks to deliver more than just physical regeneration - it aims to improve and bring together all the things that make up a community. That said the Colwyn Bay Masterplan⁵ produced in 2009 provided an integrated plan for physical regeneration aimed at reversing the town's fortunes. It defined the town's problems in economic and physical terms:

"Colwyn Bay has had particular issues associated with the construction of the A55, the physical separation of the beach from the town centre, and the consequent lack of vitality of the town centre, resulting in an underutilisation of many of the town's key tourist features and distinctive features including the beach, retail core, promenade, park and pier. Colwyn Bay has failed to establish a distinctive economic role in the hierarchy of North Wales towns and its housing, retailing and investment issues spring from this. Recognition of this led to the Bay Life Initiative and the focussing of regeneration funds within the North Wales Regeneration Area."

Description of Interventions

The Master Plan set out to use physical interventions to deliver a vision of creating: "A thriving, attractive and vibrant town that is welcoming, safe and friendly; a place with a unique character that people are proud to live in".

Both the Master Plan and the wider development proposals, focused on bringing together core elements centred on the waterfront, Parc Eirias and the town centre. Importantly both the documents emphasised the importance of integration between the town centre, waterfront, Parc Eirias and residential areas:

"It is essential that if Colwyn Bay is to fully benefit from these developments, then the traffic flows, parking, walking routes and public transport will all need to be reviewed to ensure that there is easy and logical movement around the town."

⁵ DPP Shape Ltd, 2009. Colwyn Bay Master Plan. Available at: <http://www.conwy.gov.uk/doc.asp?cat=8005&doc=26760>

Parc Eirias

A key intervention of the Bay Life+ Programme has been the development of Parc Eirias as a venue for community, cultural and sporting events.



The investment has created a centre of sporting excellence with an upgraded pitch to international standard, a 2,500-seat covered grandstand, floodlights and team changing facilities. The work will also contribute to the stadium achieving Category A status for athletics events. A pitch protection system allows spectators to stand on the sports pitch for outdoor concerts, and the multi-use centre can also be used for smaller concerts and functions.

The total cost of the project was £6.5 million, which was funded by £3.8m from the European Regional Development Fund (ERDF) and Welsh Assembly Government Targeted Match Fund. Funding was also secured from the Welsh Assembly Government Regeneration Area fund, Conwy County Borough Council and the Welsh Rugby Union.

Waterfront Project

The first phase of the Colwyn Bay Waterfront project is due for completion in autumn 2012 and involves the major redevelopment of the town's seafront into a well protected and attractive area for all users and visitors. The project brings together coastal defence works to protect the residents and businesses of the town, as well as environmental improvements along the promenade to provide an attractive public realm and help to draw more visitors to the town. The first phase includes the building of an iconic new watersports centre and cafe as well and restoring a permanent beach by importing thousands of tonnes of new sand.



Development work funded by the North Wales Coast Regeneration Area and Conwy County Borough Council, helped lever in significant contributions from the ERDF.

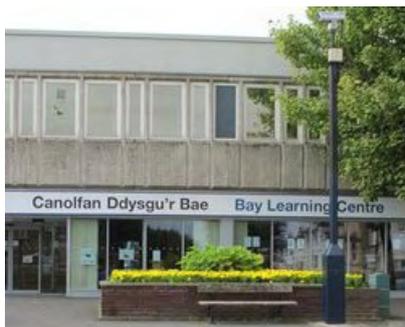
Town Centre Improvements

Strategic Acquisitions



Conwy County Borough Council has purchased a number of properties in the Colwyn Bay that are of strategic significance to the town centre. The former Market Hall building and neighbouring properties on Princes Drive are part of that programme. The site is an integral part of the Masterplan to regenerate the town because it's in an important and prominent location between the Station Square and Penrhyn Road. Ultimately the site will be redeveloped.

Theatre Colwyn



Theatre Colwyn reopened in the town centre in September 2011 following a £738,000 front-of-house redevelopment. The redevelopment was funded with £500,000 from the North Wales Coast Regeneration Area and £238,000 from Conwy County Borough Council. Theatre Colwyn now has a completely new front entrance, with the original Victorian brickwork visible, as well as improved disabled access, ground floor bar, new offices, relocated box office and community room.

Bay Learning Centre



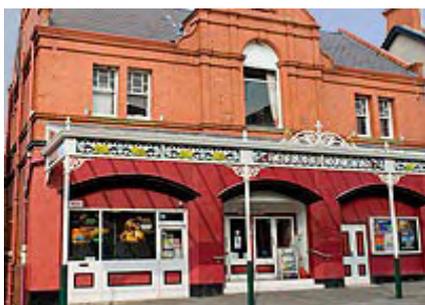
The Bay Learning Centre opened in 2010 and includes a custom-built Deaf Studies suite and state-of-the-art IT facilities. The centre provides advice, information, support and learning to those who are economically inactive, unemployed, have been recently made redundant or wish to progress from low skill employment. The centre was developed by Coleg Llandrillo Cymru in partnership with Communities First and the Youth Service.

Streetscape Project



The aim of the Streetscape Project is to help regenerate the most heavily used areas of the town by providing improved facilities for all users and also to improve access to the commercial sector of the town. To date, the project has focused on key town centre streets including Sea View, Penrhyn and Station Roads. Pavements and carriageways have been improved using new surfacing materials; and new signage, street lighting, bollards and safe pedestrian crossing points have been installed.

Marketing and Events



Colwyn Bay has a strong story to tell to would be investors. Funding has been secured to undertake a marketing campaign to fully promote the investment opportunities that Colwyn Bay now offers. In addition, a major events attractor will shortly be contracted to help ensure that full advantage is taken of the new facilities at Parc Eirias, Porth Eirias and the town centre. A new annual Festival has already been successfully launched linking to the town's dynamic war time heritage.

Key Successes

A key success to-date is the way that regeneration in Colwyn Bay has been undertaken in a coordinated way to deliver major capital works that will attract new visitors to the edges of the town and provide very high quality facilities for local use. Parc Eiras, for example, is an outstanding and flexible sports and leisure venue that can host international level competition and large open air concerts. Importantly, Bay Life+ is increasingly focusing on 'softer' revenue-based activities that will attract more people to the town centre and provide wider social benefits for residents.

Barriers to Progress and Failures

Beyond the obvious statement that a continued injection of public funds will be helpful to complete the regeneration of Colwyn Bay, there is a concern that the town still struggles to attract necessary private sector investment. This is evidenced by the decision for the Council to run the water sports centre 'in-house' initially but also by the apparently high number of empty properties in the town centre. Prominent amongst the empty buildings is the Imperial Hotel which stands on the corner of Station Road and opposite the proposed new Station Square. The Imperial Hotel currently has a planning application for conversion to residential use and it would seem a negative step to allow the loss of the commercial function of such a prominent building.

A more practical issue facing the delivery of the Colwyn Bay Masterplan, is to deliver and monitor the success in providing improved linkages in physical or promotional terms between the new town-edge venues and the town centre. With a notable lack of good quality restaurants or hotel accommodation in the town centre, it will be important to improve the town centre offer and subsequent promotion in unison.

Timescales and Developmental Trajectory

Colwyn Bay is a town that is intrinsically full of character with notable Victorian architecture and a very attractive setting. Although there is evidence of deprivation and there remain prominent empty premises in the town centre; there is a strong sense that the coordinated activity backed by Conwy Borough County Council and the Welsh Government is helping the town to 'turn the corner'. For example, there are a number of smarter cafes in the town centre that suggest a degree of business confidence. Up-to-date monitoring of impacts would help monitor this change and the outcomes as this transformation is completed.

As the waterfront improvement is completed and plans progress for the re-use and re-development of buildings acquired in the town centre, it becomes increasingly important to develop a sustainable programme of events, promotional activities and the attraction of inward investment.

5 Holyhead - “Symbolic Turning Point for Town Centre”



The Holyhead Empty Shops Initiative, Holyhead Forward, the Mon a Menai Regeneration Area & Plas Cybi Communities First initiative

Summary of Key Learning Points and Implications for Practice Elsewhere

This case study focuses on the Holyhead Empty Shops Initiative as a symbolic turning point in the long-term regeneration of a town centre that three years ago had the highest retail unit vacancy rate in the UK. It does this against a background of an understanding of Holyhead's history as a 'place people pass through' and appreciation of a wider economic strategy. The case study also brings together the application of economic and social regeneration through the joined-up delivery of two Welsh Government, place-based intervention programmes: the Mon a Menai Regeneration Area and Plas Cybi Communities First initiative.

In doing so, the case study offers practical solutions and lessons that are transferable to many towns facing a decline in their centres that is made apparent by high numbers of empty shops. Strong leadership, effective partnership working and local knowledge contributed to the project's success but the key innovation was in persuading private landlords to agree to consider rent-free or minimal rent periods to help develop new businesses and become long-term tenants.

Next step development opportunities and challenges include the refurbishment of two iconic town centre buildings and the creation of a financially viable delivery body to help sustain regeneration. This has to be achieved in a way that complements the wider large scale development including the proposed marina development on the outskirts of Holyhead. In delivering these town centre improvements and coordinating activity with these wider developments, it will be important to determine whether the sole purpose of Holyhead town centre is to serve as a good quality local service centre for residents or can it also be a significant destination for visitors.

Location, Scale and Context

Although Holyhead is a relatively small coastal town with a population of 12,000, it has a wider strategic significance and combination of circumstances that make it a focus for wider economic development. Within this wider context, the challenge facing the town centre is to ensure that it serves as a key hub that complements and benefits from various dispersed development proposals rather than being overlooked.

Holyhead has a long history as a port and is well-known as one of the main ferry terminals connecting Britain and Ireland with regular daily services. Although situated on Holy Island at the north western extremity of Anglesey, it also has good transport connections to the rest of North Wales, North West England and beyond via the A55 trunk road and mainline rail service. Holyhead is a place that millions of people pass through -the challenge is to capitalise on this.

The long-term decline of Holyhead's function as port and more recent closure of Anglesey Aluminium and recent shut down of one of the two turbines at the Wylfa nuclear power station, have impacted on an already vulnerable economy. In 2008 the Gross Value Added (GVA) per head for Anglesey was 55% of the UK average at only £11,333. Over the period 2008 to 2010 the percentage of Job Seeker Allowance claimants for Anglesey rose from just under 5% to a peak of nearly 10%.

There is a ten year economic strategy for Holyhead which was published by the 'Holyhead Forward' Board in 2003 and reviewed in 2008. The Strategy document describes itself as "a holistic framework for creating a better Holyhead and is a first step in defining a coordinated response to the needs of the town and its people". This plan seeks to improve the economic well-being of local people and exploit the area's geographic location and transport links.

The importance of improving Holyhead town centre was recognised across the five goals of the Economic Strategy that focus on business, social, learning, cultural and urban environmental strands. European funding has assisted in delivering a number of major projects as part of this strategy but the impact on the town centre has been mixed. The Celtic Gateway Bridge provided improved pedestrian access from the port, railway station and east Holyhead communities; and more car parking, new cafe and bar premises and public realm improvements enhanced the town centre experience for users. However, the 2008 review recognised that despite these improvements, the development of the new out-of-town Penrhos retail park also coincided with a worsening of town centre vacancy rates. By 2009 Holyhead had the highest vacancy rate of any town centre in the UK; with 39% of premises empty.

Interestingly a survey of local residents conducted as part of the Strategy review, revealed that whilst the most popular improvement was the new retail park, calls for future improvements were dominated by the need to improve the shopping, parking and visitor attractions in the town centre. The change that was most disliked was the fall in both the quality and quantity of town centre shops.

Description of Governance and Funding Structures

Against the background of the Holyhead Forward Partnership Board and its long-term strategy, support for town centre regeneration has been brought in to focus by the existence of both a Welsh Government Communities First programme aimed at tackling social

deprivation in adjacent areas -the Plas Cybi Partnership- and strong emphasis on town centre enhancement across the Mon a Menai Regeneration Area.

Plas Cybi, as a community-owned company and charity, has increasingly focused on enterprise development as a way of helping the long-term unemployed and delivering social aims. At the same time, the Mon a Menai Board has placed an increasing emphasis on working with local partners to deliver 'softer' people-focused regeneration objectives. This geographical and thematic overlap of the two Welsh Government placed-based initiatives, has allowed them to have increasingly developed a track record of working together in Holyhead town centre and combining their respective revenue and capital funding streams.

To date, the project cost for the Holyhead Empty Shops Initiative date has been just under £20,000 and has been provided by the County Council and the Regeneration Area with all works including shop refurbishment undertaken in-kind by suitably qualified Plas Cybi staff .

Pattern of Problems Targeted

Sample Indicator	Holyhead	UK
Function		
% Independent retailers	73%	67%
Comparison: convenience retailers	47:53%	60:40%
User's origins (% locals)	61%	57%
% using town centre more than once per week	75%	69%
Length of visit (% staying in town centre less than 1 hour)	51%	34%
Trends		
Business vacancy rate	18%	9%
Footfall (busy & quiet days)	114 & 93	115 & 83
Business confidence (% reporting reduced turnover)	75%	44%
Issues		
Users perceptions (variety & quality of retail -poor or very poor)	91%	53%
Users perceptions (physical appearance of town centre -poor or very poor)	66%	26%
Users perceptions (leisure and cultural activities -poor or very poor)	76%	47%

Focusing specifically on the contemporary challenges facing Holyhead town centre, it is instructive to draw on the benchmarking data commissioned by the Isle of Anglesey County Council with Welsh Government support and collected by Action for Market (AMT) in September 2011. This revealed the following headline key performance indicators (KPIs) that give an objective portrayal of Holyhead town centre and can be used in comparison with other towns and to direct and monitor improvements over future years:

In summarising the analysis of the AMT Benchmarking data from September 2011, a number of relatively minor remedies were suggested that were capable of having a positive impact on the town centre user experience. In particular it was highlighted that the high number of vacant units, especially in Market Street, creates a very poor impression to a first time visitor, so initiatives to encourage retailers, preferably those selling comparison style goods need to be put in place. Simple remedies such as placing local art in the windows of vacant units were suggested to help create a more welcoming impression.

An improved retail offering would encourage town residents and those within the hinterland, who are currently underrepresented, into the town centre. Quite a few of the town centre users when surveyed augmented the view that activities should be held in the town to attract

the tourists from the ferry and cruises. It was identified that even the modest existing market had an impact on Holyhead in terms of increased footfall and car parking occupancy, thus suggesting that events, specialist markets and festivals would bring in the much needed residents, visitors and tourists if well organised and promoted.

This potential for short-term improvements to the town centre needs to be set against an appreciation of major peripheral developments currently in the pipeline that help support wider economic development. These include existing infrastructure for a business park, new facilities for cruise ships; plans for a nearby major marina development and an eco tourist destination. Whilst all of these developments can create more 'passing traffic' for Holyhead, the challenge is to convert some of this in to a boost footfall in the town centre. Of these, the most immediate opportunity is to determine how to improve the town centre 'offer' for ferry passengers and increasingly frequent visits from cruise ships.

Description of Interventions

The Holyhead Empty Shops Initiative involved approaches being made to the owners of vacant shops – a mix of local people and owners further afield in London – to discuss their views on entering into rent-free periods on their properties. The intention was to secure premises rent-free and then implement some quick fix works, internally and externally, to make them presentable.

Plas Cybi used its charitable status to apply for business rate relief of up to 80% on all the premises that were secured on rent-free tenancies.



This began in March 2011 with a local retired pharmacist offering his old chemist shop free for a year. This positive response kick-started momentum which resulted in an additional 5 vacant shops being secured for the initiative. Three of these shops were offered rent-free for periods ranging from 6 months to 12 months while another two units had rents reduced by over 60%.

By the end of 2011, six previously empty premises were open – creating 5 new businesses which currently employ 12 people.

Key Successes

The Empty Shops Initiative has served as a symbolic boost for Holyhead town centre as well as practically helping to establish 5 new businesses in previously 6 empty retail units. These

businesses have brought activity back into the town centre which in turn has given confidence to another two local businesses to establish themselves in premises which were previously empty.

The initiative has generated discussion and generally positive feedback within the community. Local people see some life, albeit gradual, being brought back to their town centre.

Owners of vacant properties now see some light at the end of the tunnel as they have tenants in their premises. Of the 5 businesses who started in 2011 on rent-free tenancies, three have now negotiated extended tenancies which involve some payment to the owners. The initiative represents 'outside-the-box' thinking and collaboration between the public, private and third sectors.

The Welsh Government has backed the initiative and wants to see it expanded, and in July 2012 offered Plas Cybi a further £30,000 to bring at least 3 new shops back into use. Plans are afoot to bring another 8 vacant premises back into use during the next two years. Demand for premises is high with locals keen to take up premises with low rents and rates.

Plas Cybi also organizes fun days in the main town centre aimed at bringing people back into the town. These events have proved highly popular with hundreds of locals taking part in activities in the main Market Street shopping area. This has enabled the shops to market their wares and has opened the eyes of the locals to the changing face of their town centre and highlights the positive works being carried out.

The local High School pupils, through their enterprise clubs, have created new products which are now sold in some of these newly created retail outlets. They have generated income for their projects as well as being involved in the regeneration of their home town

Barriers to Progress and Failures

It is important to build on this symbolic success that is helping to overcome a longstanding and very negative issue as other initiatives are taken to improve the town centre and wider economy. Part of the challenge will be to maintain the momentum as public sector budgets are under continuing pressure and the Welsh Government reviews its approach to place-based regeneration through both the Regeneration Areas and Communities First programme. The mix of capital and revenue funding available with in-kind support for refurbishment, negotiation and business support has been an important factor in the schemes success. The continued good will of local landlords is also paramount.

Looking to the longer-term when the continued regeneration of Holyhead town centre can perhaps no longer rely on the same levels of public sector investment, it is important to consider what organisational mechanism can be put in place to fulfill this role. Such an organisation should be beginning to take shape in these times of relative 'plenty' in terms of public funding through the Regeneration Area and Communities First so that it can show strong leadership across social, economic and environmental focus for town centre improvement. By investing and capital funding in acquiring and refurbishing premises, it would be possible to create a viable, long-term revenue stream. It should perhaps increasingly focus on increasing revenue activity in a way that complements wider economic development proposals and increases footfall and spend in the town centre as a result. Such an organisation could manage key assets within the town and use the income from these to both fund its enabling work and contribute towards the costs of marketing activities

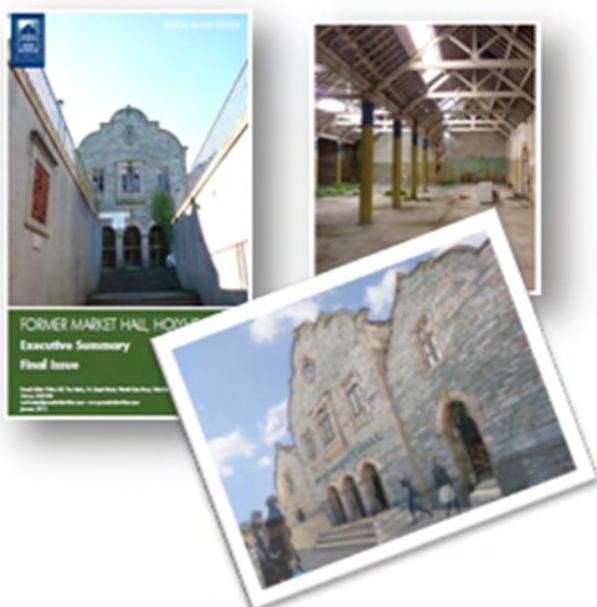
and events. Plas Cybi, the Holyhead Forward Board, Town Council and other key stakeholders need to be involved in determining this.

As the empty shops initiative expands and attracts interest from other towns, it is perhaps important to clarify the basis for the eligibility for 80% business rate relief. Plas Cybi as a charitable organisation and intermediary is claiming the business rate relief rather than the property owner or tenant and it needs to be determined how this might be affected as the new businesses begin to trade profitably.

Timescales and Developmental Trajectory

The Holyhead Town Centre Empty Shops Initiative has completed its pilot stage and is hoping, through a greater injection of public funds, to progress to Phase 2 over the next two years. This will focus on bringing eight currently vacant shops back into use by supporting local people into their first new ventures. Funding bids of almost £100,000 are anticipated which would not only secure the development of eight further premises but also establish a new support service, on a long term basis, for those new businesses established in the previously vacant premises. The long-term sustainability will be secured by landlords and owners agreeing to the gradual increase of rents from zero up to a reasonable level.

Other town centre projects in the pipeline include the restoration and re-use of Market Hall and Empire Cinema as iconic buildings and the potential extension of the Property and Environment Grant (PEG) scheme that offers financial incentives for landlords to invest in improvements to their High Street properties. There remain of course the wider large scale development proposals that are proceeding for the nearby business park, new cruise ships facilities; marina development and eco tourist destination. In delivering these town centre improvements and coordinating activity with these wider developments, it will be important to determine the primary role of Holyhead town centre: Is the main role of the town to serve as a good quality local service centre for residents or should improvements need to be specifically aimed at attracting and retaining the 'passing traffic' of tourists and visitors who might be coming to the area for other reasons.



Images from the design brief for the refurbishment and re-use of Holyhead's Market Hall

6 Neath - “Connecting the Assets”



Neath Town Centre

Summary of Key Learning Points and Implications for Practice Elsewhere

The approach taken and investment to date is situated within a mid-term phase of investment with some notable schemes becoming part of the town centre offer such as the Gwyn Hall, starting to put the town on the map. A number of key traffic management, public realm and development schemes will strengthen the role and function of the town, whilst ensuring its character as an independent shopping destination.

Key learning points include the role that gardens and parks can play within town centres in terms of activity and community life, event led regeneration that celebrates local history and culture and thirdly how the local authority is realising its assets to meet local priorities through key town centre sites as well as facilitating new ways of working through the town centre consortium.

Location, Scale and Context

Neath town centre sits within the town of Neath which has a resident population of approximately 46,000 people⁶. The County Borough has a population of 134,000 and is the seventh largest unitary authority in Wales. The town of Neath is one of the oldest towns in Wales, being founded by the Romans in AD75, and later resettled by the Normans in the 12th Century, from which time, the town's Castle dates. Coalmining and Copper Smelting commenced around Neath in the early 16th Century, and Industrialisation continued to grow throughout the 17th and 18th Centuries. Urban areas include the towns of Neath, Port Talbot and Pontardawe, whilst inland the Afan, Neath, Dulais, Upper Swansea and Amman valleys are rural in aspect with scattered communities, many of which had their origins in the coal mining industry.

The town centre is accessed off the A465 by the A474 which links to Briton Ferry. The main town centre is centred on Angel Street, Green Street, New Street, Orchard Street, Queen Street, Wind Street, Water Street and the Parade. In 2007 the town centre had a net retail floor space of approximately 157,000 square feet of comparison goods, and 127,000 square feet of convenience goods. This is a mix of national retailers with over 50 independent

⁶ 2001 Census

trading shops. In addition the Victorian Indoor Market has a diverse range of independent retailers. The south eastern edge of the town centre is framed by Victoria Gardens, with the main Council administrative headquarters situated to the North East with the main railway line forming a western edge to the town centre.

Description of Governance and Funding Structures

The main town centre regeneration activity has been delivered by the local authority in partnership with local representative organisations.

In 2012, the Council working with the Town Council and Neath Town Centre Businesses has established the Neath Town Centre Consortium, which is identified with the key objective of “promoting Neath Town Centre as a desirable destination for residents and commerce, with additional strands developing the delivery of exceptional facilities, providing a warm welcome, quality customer service and a positive experience when visiting the Town Centre and surrounding areas”. Its specific aims are to:

Aims:

1. Enhance Communication & Knowledge amongst stakeholders regarding developments in Neath Town Centre.
2. Ensure efficient Promotion, Marketing, Research and Customer Service in Neath Town Centre.
3. Ensure Neath Town Centre improves and capitalises upon the existing resources – events, attractions, arts, culture, history, sports, retail, heritage & history.
4. Explore the development and integration of a tourist information resource in the town centre.
5. Enhance the appeal of the town centre during the festive period which includes decorative lighting, Father Christmas visits, market opening times etc.

The town centre has received funding to date through Neath Port Talbot County Borough Council, Welsh Government (Valleys Regional Park, Western Valleys Regeneration Area, and DET), Heritage Lottery Funding and through other sources.

Pattern of Problems Targeted

Neath has encountered issues and problems that face most UK town centres with increased competition from out of town retail and from stronger competing centres. Whilst it is well located off the A465 and near to the M4 its local highway network is not that accessible in terms of its town centre. Issues identified from within historical documents such as the Neath Town Centre Strategy and Action Plan, include:



- The general streetscape appearing worn and tired in and around the pedestrianised area;

- Parking is seen to be disconnected and hard to find within the town centre offer;
- Whilst the retail offer is generally good, there is a need to make it more cohesive in terms of quality, range, choice and overall brand identity;
- The town centre has a number of key assets that lacked linkages and did not have a direct association with a wider town offer that is not just retail-led, e.g. Victoria Gardens, Gwyn Hall.

Description of Interventions

The main aim of town centre regeneration is to “To create an attractive, vibrant and competitive town that meets the needs of its users, whilst retaining its friendly market town charm and character⁷.”

Neath Port Talbot County Borough Council and partners have had a focus on the town centre for a significant number of years with the Western Valleys Regeneration Area (WVRA) programme helping the local authority and town centre partners in realising some of its strategic objectives.



Investment from WVRA has supported a number of direct town centre projects including the proposed retail development along Water Street, some property acquisitions within the town centre to facilitate integrated approaches to new development, traffic management proposals for the Parade, commercial property improvement grants, transport improvements to the railway station, event support and support for the redevelopment of the Gwyn Hall. The Council has also been successful in leveraging in other funding towards projects such as Victoria Gardens and has developed a good working relationship with the Town Council in terms of being innovative in managing Council owned stock to fulfil retail occupier requirements within a tough economic climate.

Whilst the Council has not refreshed its strategy and action plan for the town centre, it appears that they focussed on its assets and how best to align these to the town centre product. Whilst the town centre manager continues with event development, marketing and promotion there are some significant projects completed and awaiting delivery.

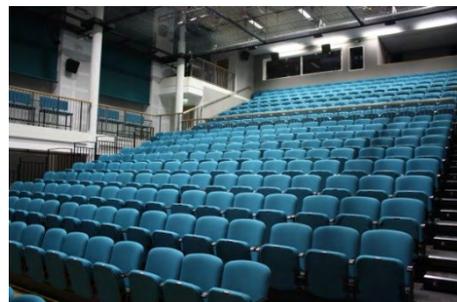
- **Victoria Gardens** is an excellent example where the Council has recognised the importance of such as resource on the edge of the town centre. Its location extends the offer and overall experience with fantastic views to the outlying hills providing a strong sense of place. The refurbishment of the Gardens has involved new landscaping, trails, seating and restored band-stand with a park “hub” type building providing a community and educational resources as well as an office



⁷ Neath Town Centre Strategy & Action Plan 2005

for associated staff. Tree trails and health trails promote nature and well-being with the Gardens also part of wider town centre heritage trail. Monies from Heritage Lottery funding have also supported a development officer that has provide event and activity support such as music in the bandstand, lantern parades as well as using the Gardens for arts and creative activities.

- The **Gwyn Hall** was built in 1887 on land given by Howel Gwyn and has a strong association with classical concerts. The hall situated on Orchard Street, a key shopping street, underwent extensive reconstruction and modernisation in 2011, with a fire in 2007 halting the work. The Hall has a new theatre with retractable seating, flexible studio space, 3D cinema, public cafe bar and ancillary space for rehearsals and conference/meeting facilities. The building has been completed to a high specification and is a key asset within Neath town centre, with it attracting 95,000 users within the first year of its opening.



- **Water Street Retail Development.**

This site is seen as a key objective in terms of anchoring the town centre in terms of stronger comparison retail and bringing about better accessibility by as well as assembling key parcels of land that are either surplus or not being maximised to their full potential. The local authority has taken a key role in site assembly, marketing with the scheme seen to be a package of funding from the private sector, Jessica and local authority funding. In October 2012 the Council successfully secured £13million of Regeneration Investment Fund for Wales towards the scheme.



- **Town Centre Events.** There is a year round calendar of events that has a town centre focus with the Easter Fair in April, Neath September Fair, the Town Festival in May and the Food and Drink Festival in October. In November, Neath also holds the Father Christmas parade and the switching on of the lights. Victoria Gardens, the Gwyn Hall and other venues are seen as key sites to anchor events with the shopping street used for markets and other activities.



- **Town Centre Management.** Whilst in its infancy the town centre consortium is seen as a vehicle to positively promote Neath town centre. Activities such as a single web site for the town, social media, business training and development, a marketing strategy, loyalty card scheme are being looked at with the town looking to see if they can move toward a Business Improvement Districts model. There appears to be a willingness to ensure a co-ordinated approach to the process with a core group established with task groups also being identified.
- **Other town centre regeneration activities include:**
 - Train station improvements in terms of frontage, information and accessibility improvements including enhanced linkages to The Parade;
 - The Parade is currently a wide street with limited pedestrian space with vehicles dominant; this proposal involves narrowing the carriageway, provision of service bays and wider pavement areas;
 - Commercial development grants within key streets such as Wind Street and Queen Street;
 - Attracting investment; the high quality Blue Bell Hotel is situated on The Parade which is working with the Council towards a grant via the property development fund for the neighbouring building; the hotel has a Spanish restaurant, accommodation and its proximity to the train station has seen it grow in terms of group bookings, sport event related bookings with a real confidence about Neath as a destination. Neath is also supported by some other high quality hotels such as the Ambassador and the historic Castle Hotel which underpins its base for business travel and visitors.



Key Successes

The approach taken by the local authority and its partners has not focussed around a master-plan approach but has fixed on its main assets that are in their control in terms of ownership and fit with its corporate objectives in terms of economic and community well-being. It has also levered in significant funds from the Western Valleys Regeneration Area Programme that has dealt with large capital projects to smaller interventions.

It has also recognised that town centres are not just about retail but about providing a mixed offer involving arts, culture, leisure, recreation, events and about how you can connect these activities through legible marketing at a street level and through the web and technology such as QR codes.

Whilst there are no tangible impacts in terms of quantifiable figures, there is a sense that its original action plan is converging on its vision and strategic aims and with the realisation of the Water Street development, Neath will consolidate and enhance its role as a key

shopping and visitor destination.

Timescales and Developmental Trajectory

The approach taken and investment to date is situated within a mid-term phase of investment with some notable schemes becoming part of the town centre offer such as the Gwyn Hall, starting to put the town on the map. A number of key traffic management, public realm and development schemes will strengthen the role and function of the town, whilst ensuring its character as an independent shopping destination.

In five years' time, Neath should be able to demonstrate that it is a confident and diverse place to shop and visit that will become known as a destination for all with its connections to rail and road. Western Valleys Regeneration Area funding has helped with the foundations and has identified the need to be holistic and interventionist in terms of making the step change in the town centre.

7 Swansea - Integrated mixed-use development – Swansea's URBAN VILLAGE

Before:



After:



Summary of Key Learning Points and Implications for Practice Elsewhere

Registered Social Landlords (RSLs) are playing an increasingly important role in “people and place” regeneration at both the strategic operational level and as agents of development delivery. As Social Housing Grant allocations are under increasing pressure, many RSLs have established very strong development teams and are actively seeking ways to diversify their portfolio, lever grant more effectively, and to generate additional revenue streams to support future housing investment.

By aligning their social objectives with commercial development awareness, they bring a different approach to make investment happen in otherwise difficult circumstances and can be very important agents of change; stimulating future commercial confidence.

This case study shows the value of collaboration in bringing together regeneration policy objectives (Housing Need/Creative Quarter Ambitions/changing physical appearance of Swansea High Street) with commercial development interest to create a mixed-use scheme of a scale to make a significant

Location, Scale and Context

Coastal Housing's Urban Village Project has been developed as an integrated mixed-use scheme on Swansea's High Street, one of the most problematic streets in the City with regards to crime, anti-social behaviour and vacant/run-down properties.

The Urban Village is a £25 million construction project comprising:

- 76 affordable apartments (all 2 bed)
- 6-8 ground floor commercial units – active retail/leisure uses
- 3,150 m² commercial offices over 3 floors
- 2,400 m² creative cluster space over 4 floors

- Temporary performance space – The Venue

Description of Governance and Funding Structures

Coastal Housing own and manage the overall scheme but have worked in partnership with City & County of Swansea on the design and planning and Welsh Government on the funding solutions to bring the project to fruition. As well as funding support from the Swansea Regeneration Area, Coastal Housing also secured a 20 year loan from, the ERDF supported, European Investment Bank (EIB) and may attract Regeneration Investment Fund Wales (JESSICA) funding for the Creative Cluster phase.

Pattern of Problems Targeted

Swansea High Street has deteriorated over the past 20-30 years as the commercial core of the city shifted south west with the completion of the Quadrant Shopping Centre in 1979. The area is rife with anti-social behaviour issues and problems with drug use; particularly in the narrow lanes which previously connected this site linking High Street with the Strand behind.

What was once a thriving commercial and leisure area with hotels, clubs and shops many of the buildings have been left abandoned and derelict and yet the street remains an important route-way from the main-line railway station which has recently seen a £7.6 million facelift.

The ambition is to create a new focus for Swansea High Street, through a variety of development projects linked with the Creative Quarter emerging in nearby Alexander Road and other housing projects undertaken in the area. A new vibrancy from art, culture and commercial activity is to be encouraged providing stronger footfall activity and sustained investment in the future.

Description of Interventions

Coastal Housing has at its heart a philosophy of creating opportunities for sustainable city living. The project has, therefore, been targeted at supporting primarily those people in work, or people not currently in work, who will be able to access work by re-locating to affordable accommodation in the city centre.

Coastal Housing's Development Director perceived an opportunity for a city centre project in the late 1990s and commenced initial site acquisition. A number of concept projects were tested but all had viability concerns until a scheme of sufficient scale and further external funding could be realised.

Whilst affordable housing is at the heart of the current scheme it is also primarily designed to create a commercial income stream to support the wider development programme in light of anticipated reductions in Social Housing Grant.

Timescales and Developmental Trajectory

The project has been more than 10 years in the making since Coastal Housing first began assembling site ownership. Phase 1 has recently completed (2012) and development of the Creative Hub is expected to start in 2013 with completion within 12 months.

Key Successes

Phase 1 of the project is completed which has transformed the previous derelict/vacant plot, creating a high quality design and vibrant street frontage. The apartments are due for

completion early in 2013; as there is a waiting list for these flats they will all be occupied immediately on completion. Coastal Housing has taken one floor of the office accommodation, relocating their HQ operations and moving over 100 staff from Wind Street allowing them to sub-let their previous space. The remaining two floors are being actively marketed. Ground floor commercial units are receiving strong interest but incentives are needed for occupiers to overcome perceptions/concerns of the location. A new bistro has recently opened in two units and “heads of terms” are being completed on another unit for a retail operation.

Coastal Housing is about to submit a planning application for its next major city centre mixed development scheme with City & County of Swansea for the “Castle Quarter” in Castle Lane which is due to start on site in spring 2013.

Barriers to Progress and Failures

Several development concepts were tested for the site over a long period of time, none of which worked effectively. The scheme had stalled for a period until Swansea Regeneration Area funding was made available to stimulate commercial potential.

Welsh Government support for the CPO process was crucial in unlocking the final site acquisition to enable the comprehensive development of the site.

As an RSL, Coastal Housing has been able to put together a mixed use scheme, underpinned by social housing grant towards the housing element, and to take a long term view of financial returns and operational/management costs which may otherwise have made the scheme unviable to a more traditional/short term developer.

8 Swansea - “Swansea Business Improvement District – Adding value”



Summary of Key Learning Points and Implications for Practice Elsewhere

Business Improvement Districts (BIDs) were first established in the UK in 2006 and there are currently over 110 established schemes. The Swansea BID is now in its second term of five years and until the recent “yes” vote in Merthyr Tydfil has been the only BID running in Wales in all this time. Whilst the degree of success of BIDs may vary, they are an important means of properly engaging business interest and driving, local, private sector focus on town centre improvement, in partnership with local authorities. Recent experience in Cornwall, is also demonstrating how smaller, commercially exposed town centres are also benefiting from the BID process and local action on targeted investment.

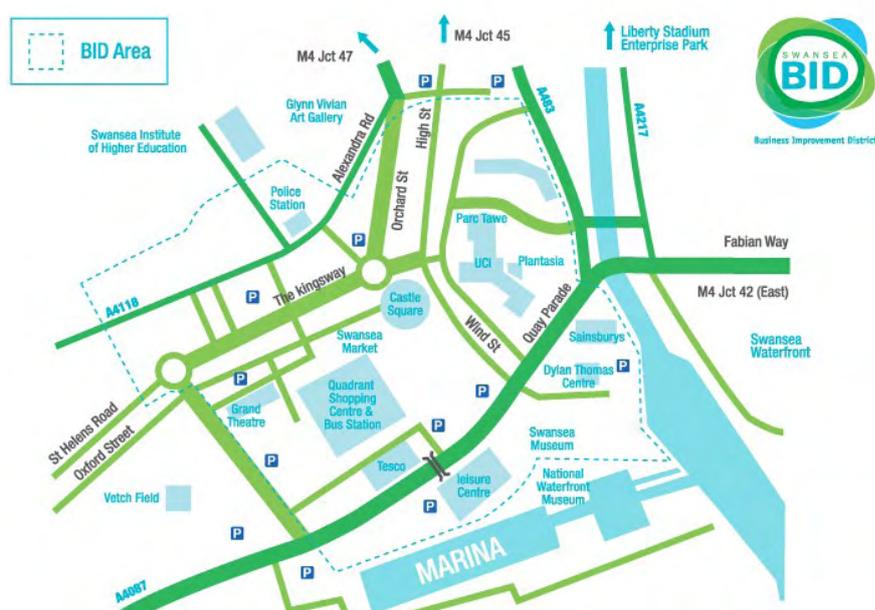
In Swansea, whilst the initial pilot (2006) needed the City & County input to mobilise business interest and provide officer support to build local capacity, the initiative is now very firmly business led and driven. A BID has to be able to establish an independent identity to foster local commitment and trust and demonstrate clear “added value” services to local business as a tangible and measurable “return on investment” rather than seeing the Business Rate levy as an additional tax burden.

This, in turn, puts pressure on local authorities to be fully accountable for their town centre services setting a clear baseline for service delivery and avoid the often fragmented nature of operations we still see today.

Location, Scale and Context

Swansea has successfully run the first Business Improvement District in Wales since 2006. The initial pilot scheme (2006-2011) received a strong mandate for a further five years to 2016 following a fresh ballot of city centre businesses.

Some 800 businesses within the central core of the city (see map below) have agreed to pay a 1% levy on local Business Rates to support a programme of local investment and added value improvement.



Description of Governance and Funding Structures

The Swansea BID is formally structured as a Private Limited Company with a Board of 11 directors representing a variety of different sized and types of business within the BID area. A small management team has also been established led by Russell Greenslade as Chief Executive reporting to the Board of Directors. Director led working groups also take lead responsibility for the key operational areas established in the Business Plan.

The initial pilot BID was strongly supported and driven by City & County of Swansea and Welsh Government to help mobilise and motivate private sector businesses. The BID management is now wholly private sector led providing a powerful voice to engage more fully with the City Council and other partners.

The Business Rate levy is collected by the City & County of Swansea on behalf of the BID. All proceeds (net of collection fee) are channelled into operational projects agreed in the Business Plan. The Swansea BID has a high 80% collection rate.

In order for the BID to demonstrate clear added value activity, a Service Level Agreement has been established with the City & County of Swansea to clearly define the baseline service from the Local Authority and to clarify the additional services provided to business by the BID management. This is fundamental to be able to present a clear case to businesses and to be able to demonstrate a proper return on investment (RoI) from their involvement and support for the Swansea BID.

Pattern of Problems Targeted

Despite best efforts to support regeneration, the city centre in Swansea was showing clear signs of decline and physical deterioration. Greater attention to detail was required to achieve a step-change in city centre management and support for businesses and traders.

Description of Interventions

Based on consultation with local business, the Swansea BID has five key objectives on

which it is focused to deliver added value as follows:

1. Car parking & Transportation
2. Safety & Security
3. Marketing/PR & Events
4. Cleansing
5. Supporting & Attracting Business

The BID Partnership have successfully negotiated parking concessions with NCP providing one hour free and discounted rates to local businesses and improving signage to main car parks making it easier for visitors to the city.

The BID Partnership has supported the deployment of Taxi Marshalls helping to reduce crime/fear of crime and support Swansea's strong night time economy.

The BID Partnership has a strong programme of promotional events throughout the year and supports the local "loyalty" card which has enlisted some 10,000 local members.

The BID Partnership has invested in specialist cleaning equipment to tackle the problem of chewing gum on the streets and also provide free graffiti removal service to BID Members.

The BID Partnership is active in promoting new business opportunities and has embarked on a programme to "dress" vacant units with vinyl window coverings, promoting the BID area and minimizing the visual impact of the empty shop. A simple but effective process, the BID Partnership is also actively supporting City & County of Swansea and Welsh Government in the City Art Initiative to make the city a more attractive place to invest.

Key Successes

The 2011 Business Plan highlights the success of Swansea BID, working with other partners, as having:

- Reduced violent crime & disorder by 68%
- Reduced retail crime by 21.1%
- Reduced retail theft by 15.3%
- Reduced Anti -Social Behaviour by 25.5%
- Won a National City Centre cleansing award, making Swansea City Centre
- The cleanest City Centre in the Country.
- Brought in over 150,000 people into the City Centre through events such
- As Swansea Live, Get Welsh, Urban Golf etc.
- Brought in over 100,000 vehicles into the City Centre through car
- parking initiatives.
- Introduced direct BID Member Benefits worth up to £20,000 per Member.
- Directly invested £2.3 million back into the city centre.

Barriers to Progress and Failures

It is vital to have a clear and distinctive role and purpose for the BID programme. BIDS must be seen to be private sector led to engender support. This is demanding in resource commitment and motivation, typically on a small number of committed individuals.

Comparator Case Studies

9 “Creating a New Story for Flintshire Towns”



Flint& Flintshire Town Action Plan Programme

Summary of Key Learning Points and Implications for Practice Elsewhere

This case study shows how a local authority has used its own resources to facilitate a locally-based approach to town centre regeneration through the development of town centre action plans and partnerships for 7 small towns. This authority-wide approach has helped identify key interventions and investments for each town and develop a strategic understanding of the complementary future roles of the neighbouring towns.

The case study focuses specifically on the application of this approach in the small town of Flint to show how this "top-down meets bottom-up" approach works and in particular how it will address the pressing challenge of town centre housing renewal and the health of the High Street.

In undertaking this authority-wide approach, the Flintshire County Council acknowledges that there have been important lessons learnt about the flexibility of approach needed for different towns balanced with clarity about the role, function, composition and operation of town partnerships. While the small-scale funding has been important in developing action plans and providing 'quick win' outcomes, it is a coming together of different stakeholders that has been a key outcome of this work.

Location, Scale and Context

The County of Flintshire covers the length of the north east coast of Wales fronting the Dee Estuary and is well served by both the A55 trunk road and the West Coast Rail Line. The County benefits from strong cultural, social and economic ties with both the neighbouring parts of England such as Chester to the east, as well as with the adjoining Welsh counties of Wrexham and Denbighshire to the south. Flintshire has been more resilient to economic changes than other parts of North Wales. This is largely due to Flintshire's success in diversifying its economy into the growing higher value manufacturing sector.

Flint is one of eight town and district centres in Flintshire alongside, Connah's Quay, Shotton, Queensferry, Saltney, Mold, Holywell and Buckley. Flint gives its name to the County of Flintshire and Flint Castle, completed in 1286, was the first of King Edward's "Iron Ring" of fortresses to be built with the purpose of conquering Wales. The site of Flint Castle was chosen due to its strategic positioning in north east Wales, this positioning continues to have an important influence today in cultural, social and economic terms. Despite this, Flint continues to face a number of challenges constraining its future potential.

Description of Governance and Funding Structures

In 2008 Flintshire County Council commissioned consultants to undertake a comprehensive healthcheck study⁸ to provide comparable data about the retail and economic vitality of 7 of its town and district centres: Buckley; Flint; Holywell; Mold; Centre; Shotton; Connah's Quay and Queensferry District Centres.

For Flint this healthcheck study concluded that it had a "relatively healthy town centre". However, it acknowledged that should the County Council decide, at a later stage, to pursue the wholesale redevelopment of the tower blocks and/or maisonettes, then it is likely that major investment will be necessary and this will create new opportunities.

As well as the centre-specific interventions put forward in the healthcheck report, a range of general measures were recommended that had the potential to protect or enhance the vitality and viability of the County's various centres. These were largely dependent on revenue funding and included: loyalty cards; a retailer forum; business training; town centre 'champions' and the assessment of retail distinctiveness.

In autumn 2009, town partnerships were formally established for each of the centres, with a range of interests represented and involved – local business, voluntary groups, county councillors, town councillors and other local organisations. These town partnerships have grown at different rates in the different towns and have developed varying priorities and focus, but all have continued to meet regularly (approximately every 2 months) via the continued help and support of the County Council.

Funding for the programme been provided by Flintshire Council to give the partnerships some focus and the ability to realise and achieve some quick win projects. In 2009/10 this amounted to £40,000 per town and £55,000 for countywide initiatives. The Welsh Government's Tidy Towns initiative provided a further £120,000.

Over the subsequent period to 2012, Flintshire County Council has commissioned a number of Strategies and Masterplans for specific towns aimed at guiding planning and the development of business and housing. The Strategy and Masterplan for Flint⁹ was published in March 2012 and approved by the County Council's Cabinet in June 2012.

Pattern of Problems Targeted

Sample Indicator	Flint	UK Average
Business vacancy rate	10%	10%
% Independent retailers	53%	68%
Number of market stalls	25	23
Footfall (quiet days)	87	83
Users perceptions -variety & quality of retail (% poor or very poor)	37%	52%
Users perceptions -physical appearance of town centre (% poor or very poor)	29%	26%
Users perceptions -leisure and cultural activities	37%	47%

⁸ Flintshire County Council, 2008. Town Centre Healthcheck Study. Available at: http://www.flintshire.gov.uk/wps/wcm/connect/04bf13004b69dbc5b3fcbb2079ce8578/TC_healthcheck_s_study_e.pdf?MOD=AJPERES

⁹ Flintshire County Council, 2012. *Flint Strategy and Masterplan, 2021*. Available at: <http://www.flintshire.gov.uk/wps/wcm/connect/c7928e004bbeb344ab9bf90c76421ce/Flint+Masterplan+English+Exec+Summary.pdf?MOD=AJPERES>

(% poor or very poor)		
Length of visit (% staying in town centre < 1 hour)	17%	34%
Shoppers origin (% local)	74%	57%
Business confidence (% reporting reduced turnover)	64%	43%

Focusing specifically on the contemporary challenges facing Flint town centre, it is instructive to draw on the benchmarking data commissioned by the County Council and collected by Action for Market (AMT) in 2011. This revealed the following headline key performance indicators (KPIs) that give an objective portrayal of Flint town centre and can be used in comparison with other towns and to direct and monitor improvements over future years.

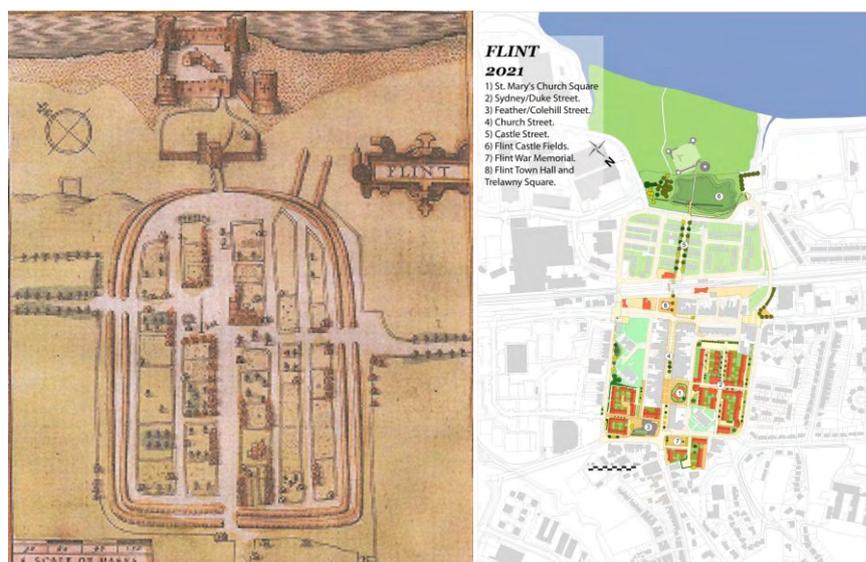
These findings reinforce the summary from the 2008 healthcheck that Flint is functioning reasonably successfully as a local shopping centre. One worrying trend is that nearly two thirds of businesses reported that their turnover was down in the previous 12 months.

The Flint Strategy published in 2012 also reinforced the earlier healthcheck findings and highlighted the following challenges facing the town:

- *Image and perception* - the physical appearance of parts of Flint, particularly the Maisonettes, detract from its image, especially for those from outside of the Town.
- *Demographic changes* - it is clear that a key population challenge for Flintshire going forward will be to retain the young working age population in order to ensure a healthy economic future. ,
- *Environment and public realm* - the condition of some of the Council housing stock and some of the publicly owned buildings; retail voids; and the dominance of car parking, inconsistent public realm and traffic do little to contribute to attracting visitors or investors to Flint.
- *Extending the visitor offer* - Flint lacks the scale of visitor attractions required to pull in and retain significant tourism numbers and spend to the town centre.
- *Access and movement* - movement in and around Flint is hampered by challenging access routes, due to poor signage and an existing access strategy that takes motorists around, not directly through the town centre.
- *Car parking* - Flint Town Centre is surrounded by a swathe of car parks but the quality of the car parking infrastructure is poor, including access routes to/from a number of the facilities.
- *Quality of life* - small pockets of Flint's Castle and Oakenholt wards suffer from heightened socio-economic deprivation levels and remain within the 20% most deprived nationally.

Description of Interventions

From 2010 and with continued support, guidance and project management by the County Council regeneration team, the town partnerships have been involved in supporting the implementation of a wide variety of small scale physical regeneration projects and further research. Flint has been successful in securing a Heritage Lottery Fund Town Heritage Initiative grant and work is due to start shortly.



The Flint Strategy and Masterplan focused on the historic core of the town. It adopted broad recommendations for a 12-year period of transformation in the town focused on replacing over 200 maisonette properties and enhancing the town centre and its connection to the Castle and coast. The broad objectives for this renewal are:

- *To better serve the local catchment and capture more local spend* - re-establishing Flint as the first local choice retail and leisure destination
- *To reconnect Flint's assets* - to create better linkages between the Town and the Waterfront/Castle, the Town and its hinterland, the High Street and Retail Park, employment opportunities and the Town
- *To transform Flint's physical image* - harness the redevelopment of the Maisonettes as the catalyst to the physical transformation of the heart of the Town, use opportunity sites to deliver quality new homes and facilities and enhance its historic and environmental assets
- *To encourage economic growth through job creation* - harnessing Flintshire's economic success and create enhanced physical, business and environmental conditions to retain and attract businesses and retailers to Flint, thus generating momentum for local employment, spend and economic activity
- *To embed Flint within the sub regional tourism network* - to join forces within other local visitor destinations and maximise opportunities such as harnessing the All Wales Coastal Path, the Iron Ring of Castles and Flint's close proximity to Chester
- *To more effectively promote the Town and its opportunities* - to create a clear and consistent communication strategy which people can use to promote the Town



The Masterplan has recommended a series of 'quick wins', short, medium and long-term

interventions including steps such as:

Quick wins (next 12 months)

- Environmental improvements – including in the vicinity of landmark churches
- Preparing a marketing strategy to raise the profile of the town, Castle, market, and events
- Engagement with Cadw to progress branding and the creation of a historic trail
- Identify and deliver a programme of signage improvements
- Continuing improvements to historic buildings utilising THI funding

Short-term (1-3 years)

- Commence demolition of the maisonettes
- Identifying development partners for new homes on maisonettes site, determine development schemes and commence delivery of new homes
- Securing funds to bring empty homes and upper floors of retail units back into use
- Developing and deliver an events programme focusing on the Castle, waterfront, and town centre
- Investigating the potential of holding specialist markets in Flint at weekends
- Develop a programme of support to assist existing and potential traders in the Town

Key to this whole programme is the demolition and replacement of over 200 publicly-owned maisonettes in and around the town centre. It was agreed in December 2011 that the maisonettes and council owned garages in the centre of Flint should not be re-let and should be emptied to enable the sites to be developed. The programme is expected to take up to five years. The council is currently finalising the funding and development options for this renewal of its entire town centre housing stock in Flint.

Key Successes

Whilst early days, Flintshire County Council consider that the key successes to-date in the delivery of interventions through the Town Action Plan Programme is mobilising a broad range of stakeholders, helping them to understand each of their roles and improving the coordination of their collective efforts – and sustaining this coordination over a long period of time.

Use of the council's own small scale regeneration funding has allowed town partnerships to play a key role in deciding how and where funding is spent. This has enabled the delivery of quick win projects that served to foster initiative, confidence and a 'can do' attitude in the town. More recently the funding has enabled the development of long-term plans for each town with specific timescales and with identified resources being made available, to ensure the effective implementation and management of projects. For Flint, the County Council believes that the existence of a coherent plan with local buy-in has changed perceptions within the town and further afield. Flint is seeing renewed interest in investment in the town and development sites that have been available for years are beginning to move

forward by both private investors and also housing associations.

A great deal of effort has gone into engaging the local community, essentially to bring credibility. There is commitment from Members, officers, partners – that will ensure adherence to the programme. The communication of progress will continue to be undertaken regularly - including through a regeneration newsletter. A wider marketing strategy is also being developed.

Barriers to Progress and Failures

The biggest challenge facing this project is in relation to the limited amount and sources of funding available. Flintshire Social Housing Grant allocation is committed for the next 4 years and there remains continued uncertainty of what grant levels will be in the future. Consequently, Flintshire County Council's challenge is to find alternative ways of financing new housing schemes.

Detailed work is currently being undertaken to identify alternative funding streams for the significant capital investment required to replace the 214 maisonettes, with approximately 170 new homes consisting of a mix of 2 bed houses and apartments and 3 bed houses over a range of tenures.

Flintshire is looking at achieving the optimum tenure mix of the replacement stock. Currently social rented housing comprises 49% of the housing stock in the project area, compared to 16.54% in the county as a whole. The remaining stock is made up of 44% owner occupation (compared to 75.89% of the county as a whole and 5.3% private rented (compared to 6.48% across the county as a whole). Due to the limited funding available the council will be looking for a mixed tenure redevelopment scheme which will consist of e.g. social rented, affordable rent, market rent, low cost homeownership and outright sale, to ensure the creation of a balanced community.

The diverse range of tenures will meet local needs in the context of a challenging economy and in terms of people's aspirations towards home ownership.

In order to deliver replacement housing the council is having to 're-think' housing delivery models and reinvent traditional, tried and tested mechanisms. Consequently new and innovative models of funding and delivery will be essential if the Council is to be successful in delivering the new homes.

This is particularly challenging with the solutions required to drive down costs, create new and effective partnerships and critically reduce or manage the Council's exposure to risk.

The funding models which the council is considering implementing are:

- i. Registered Social Landlord taking the lead with the council gifting the HRA land
- ii. Establishing a Joint Venture with a Registered Social Landlord so the development risk is shared on an equal basis
- iii. The council's selected developer utilising a leaseback scheme with institutional investment over a 45 year period.

As part of the overall project the council will also explore the formation of a housing co-operative for a development of 20 new homes. The Council welcomes the Welsh Government's commitment in the White Paper 'Homes for Wales' to assist in the delivery of

new homes through pioneer projects on co-operative housing as part of its action to achieve its affordable homes target and its intention to enable a new co-operative housing tenure, and any additional funding which would be available to assist would be most welcome

Timescales and Developmental Trajectory

Renewing the town centres across all of Flintshire is a long-term approach. So far it has taken over three years to establish the town partnerships and put effective strategies in place that will operate over a 12-year period. The delivery timetable will be dependent on maintaining the momentum of the town partnerships to implement minor improvements in a coordinated way whilst working with Flintshire County Council to put together suitable investment packages for the major capital programmes such as the housing renewal in the case of Flint.

10 The Kirkcaldy and Jedburgh Town Centre Regeneration Schemes as part of Scotland's Town Centre Regeneration Fund



Summary of Key Learning Points and Implications for Practice Elsewhere

The Kirkcaldy and Jedburgh Town Centre Regeneration schemes are examples of initiatives delivered to tight timescales as part of the Scottish Government's £60million Town Centre Regeneration Fund (TCRF) in 2010. The case studies consider the success of both schemes against wider lessons on the management of national funding for regeneration drawn from the Scottish Government's very informative review of the Town Centre Regeneration Fund¹⁰.

Both the Kirkcaldy and Jedburgh schemes illustrate the importance of longer-term preparatory work in developing a shared town vision, strategy & action plan to create the readiness to take advantage of funding opportunities and mobilise partners. The financial support provided through TCRF helped deliver discrete physical investments within the context of at least a partial appreciation of wider town centre issues.

Part of the lasting legacies of the schemes in Kirkcaldy and Jedburgh in particular is hopefully the way that the schemes indirectly contributed to increasing the capacity of a Business Improvement District and community-based trusts respectively, as well as strengthening their links with the local authorities. There is however, a sense that these legacies and the delivery of ongoing action plans, are to some extent 'leaps of faith' dependent on other opportunities arising, rather than staged strategies that are significantly more viable because of TCRF interventions. A prime example of this is that though a significant town centre asset has been brought in to community ownership in Jedburgh; its use and refurbishment costs are presented as a future activity with its own fund raising challenges.

Kirkcaldy

Although not delivered to the very tight schedule imposed, the scheme has been successful in progressing pre-agreed town centre enhancements as part of a wider strategy. It has also been beneficial in raising the profile of the newly formed Kirkcaldy Business Improvement District and its working relations with Fife Council. Delivery of the Kirkcaldy scheme does though raise issues about the necessary time period to implement complex and only partially developed schemes even with some pre-planning and significant injections of funding.

¹⁰ Scottish Government, 2011. *Town Centre Regeneration: TCRF Case Studies Report*. Available at: <http://www.scotland.gov.uk/Resource/Doc/358751/0121274.pdf>

Jedburgh

The Jedburgh scheme demonstrates the achievement of broad outcomes through long-standing local leadership including the acquisition of a key community asset within the town. Use of the TCRF investment provided an opportunity to advance well-developed plans for the town and increase the capacity and credibility of Jedburgh Alliance and Jedburgh Town Community Trust as community-based organisations. Delivery of the wider strategy remains ongoing and dependent on further funding whilst evidence of impacts and even the use of the community asset are still to be determined.

Location, Scale and Context

Kirkcaldy

Kirkcaldy is the largest town in the Fife local authority area and is located between Dundee and Edinburgh, which are both approximately 30 miles away. Kirkcaldy had a population of 50,600 in 2008.

Jedburgh

Jedburgh is one of a number of small towns scattered across the Scottish Borders area. The town had a population of around 4,000 people in 2008. The Scottish Borders Structure Plan (2001-2011) identified three hubs within which future economic development activities will be focussed. Jedburgh is located within the 'Primary Hub' - the preferred area within which future housing, retail and employment generation development is to take place.

Description of Governance and Funding Structures

Kirkcaldy

The Kirkcaldy scheme forms part of a comprehensive strategy to regenerate the town. As a result, planning consents are already in place. The project is led by the Council's transportation team and there is money allocated for the upgrading and maintenance of transport infrastructure over the next decade. A Business Improvement District (BID) has been formed and will be responsible for the installation of Wi-Fi as part of the scheme and other small-scale projects in future.

Jedburgh

This scheme was funded through the Scottish Government's Town Centre Regeneration Fund. This was a £60million capital fund available to town centres and local high streets from April 2009 to March 2010. The aim of the fund was to support community and business leaders to regenerate and grow town centres in order to meet the needs of local communities and businesses. It was a short competitive bidding process open to any town centre across the country.

The concept of the Jedburgh TCRF application was originally initiated by the Jedburgh Alliance and Jedburgh Town Community Trust. There is a huge momentum from these organisations to improve the town. The project complements existing work undertaken by the community planning partners within the town and is promoted as being crucial not only to support the redevelopment of a vibrant town centre but also to build confidence in the local community.

Pattern of Problems Targeted

Kirkcaldy

Historically, textiles have been an important part of the Kirkcaldy economy, and the town established itself as one of the largest linoleum producers in the world in the 1900s. However, the industry began to decline locally from the mid-1960s, and Kirkcaldy's manufacturing base declined sharply in the latter part of the 20th century, similar to many other areas of the UK.

The shift away from dependence on traditional industries towards a more service-based economy is therefore a central plank of economic development policy in Fife. As the area's main commercial, service and leisure centre, Kirkcaldy is earmarked as a strategic priority for expansion and regeneration over the next 20 years in the Fife Structure Plan. Reinforcing the town centre function is seen as critical if the town is to increase its attractiveness and competitiveness relative to other retail centres in neighbouring areas.

The town has a potential catchment of 180,000. However, it suffers from extensive competition from a semi-circle of cities and larger towns: Edinburgh, Dundee, Perth, Stirling, Livingston, Dunfermline and Falkirk. Fife Council believes that the town has greater potential to become a retail and seaside destination.

Jedburgh

The Local Plan (2008) for the area indicated that the key development issues within Jedburgh town are centred upon the need for improvements to existing road and transport infrastructure, upgrading of community facilities, expansion of primary school capacity, and protection of existing open spaces. At the same time, the revitalisation of Jedburgh town centre was recognised as a priority for further action.

Jedburgh is considered key gateway location to Scotland and is well positioned to capitalise on those travelling north and south. It was highlighted that action was required to draw people into Jedburgh town centre and to encourage them to stay.

The Trust and Alliance have been aspiring to buy the Port House, a large under used listed building, since 2002. However, they experienced difficulties in obtaining the money to buy the building as opposed to just renovating it. A number of development partnering options were explored, however none of these proved viable.

Description of Interventions

Kirkcaldy

The Kirkcaldy TCRF project brings together interlinked projects aimed at enhancing Kirkcaldy town centre and its environs:

- Replacing existing paving, lighting and street furniture on High Street with higher quality materials
- Installing Wi-Fi in the town centre;
- Enhancing the visitor arrival experience with public realm improvements at the railway station, museum and memorial gardens
- Introducing orientation boards and improving the information available to visitors at

the points of arrival to the town.

The projects required a total investment sum of £7,050,000 within the town centre, of which £2,950,000 was funded by the TCRF.



Jedburgh

The Jedburgh TCRF project aimed to improve the socio-economic performance of the town centre with the delivery of a number of key projects. In particular:

- Enhancing Mercat Place as a key civic centre & events space
- Creating a high quality destination play area and extension of the main car park
- Installing Wi-Fi in the town centre area
- Acquiring the Port House complex for future business workshop space and community facilities



Key Successes

Kirkcaldy

The funding has been particularly beneficial to the newly formed Kirkcaldy BID. There is now a great deal of dialogue between the BID and the Council and a liaison group between the parties has been set up as a direct result of the TCRF project. Furthermore, there is a now great deal of confidence in the BID as a result of the implementation of the TCRF scheme.

Jedburgh

The Jedburgh Alliance had been looking at ways of improving Jedburgh Town centre long before the recession hit and these are just part of wider strategies that the Alliance is involved in; for example, they are looking at taking over the town hall and museum.

Jedburgh was one of a number TCRF projects where such community-led initiatives to take ownership of iconic/listed buildings at below market value as community assets have emerged. The projects aim to play a catalytic role in successful town centre regeneration by initiating third sector businesses, bringing new economic uses into redundant but important buildings in the local townscape and generating civic pride. The TCFR evaluation concluded that such initiatives may have significant regeneration potential and will need to be evaluated further in due course.

Barriers to Progress and Failures

Kirkcaldy

At the time the evaluation of the scheme, the majority of work had not started, although a contractor had been appointed to undertake the works and a detailed design had been finalised. Consultation and promotion had been undertaken but delivery had been delayed by procurement processes and the sourcing of the required materials.

Jedburgh

Only now that ownership has been secured is the Alba Conservation Trust undertaking an options appraisal in order to find a feasible occupier mix to make the Port House commercially viable. However, obtaining further funding to ensure successful end use of the building is an uncertain process. It is anticipated that the project will attract new investment to shops in the town centre and more events such as farmer and international markets. It is also likely that the pub operation which has its beer garden adjacent to the destination play area will be refurbished.

Kirkcaldy and Jedburgh were two of ten towns studied as part of an evaluation of Scotland's TCRF activity which considered objectives, progress and outputs on the ground as well as wider lessons about town centre regeneration and funding mechanisms¹¹. The experience of the case study projects has highlighted a number of shortcomings and barriers to wider progress that need to be overcome.

- **Complex concept requiring integrated town centre regeneration strategies:**
Town centre regeneration is complex and deals with interrelated and multi-

¹¹ Scottish Government, 2011. *Town Centre Regeneration: How Does it Work & What can be Achieved*. Available at: <http://www.scotland.gov.uk/Resource/Doc/358309/0121114.pdf>

dimensional issues that are driven by the wider economic and other factors associated with the town. An integrated/ holistic approach to town centre regeneration is required.

- **Town centre scale & distinctiveness in changing wider context:** Twenty-first century drivers like the transition to a low carbon economy, higher quality urban design aspirations, the knowledge economy and the internet present real challenges and opportunities to town centre regeneration. It is essential to identify the particular distinctive features of the town centre. Town centres have evolved and will need to continue to change to take account of structural and economic changes.
- **Town Centre regeneration needs more than physical investment:** Traditional approaches to town centre regeneration focus on physical interventions. There is a strong case for considering other types of intervention including business development, joint marketing and events promotion alongside physical investment.
- **Shared vision, strategy & action plan:** In most cases successful town centre regeneration requires a clear vision, strategy and action plan to provide a strategic fit for project interventions. The resulting outputs and outcomes, however, are often loosely defined and poorly specified. The outcomes are therefore difficult to monitor and evaluate, particularly in the absence of clear results chains.
- **Effective & coordinated delivery is essential:** Delivering projects in town centres requires coordination with partners and within local authorities. Partnerships are commonplace, but there is a need for more clarity on roles and responsibilities and the value added. In some cases, a single agency contribution, rather than joint delivery, may be more effective at delivering a particular outcome. Resources are often committed over timescales that are too short for realistic change in town centres. Civic leaders/project champions are needed to prioritise town centres over a longer period and to initiate confidence in the vision and strategy and ensure delivery of the action plan.
- **Small/medium businesses & potential of community ownership of assets:** The case studies research highlighted that limited knowledge and data is available on small/medium businesses in town centres. Community-led initiatives to take ownership of iconic and often listed town centre buildings as community assets are starting to emerge, but have still to be evaluated.

Timescales and Developmental Trajectory

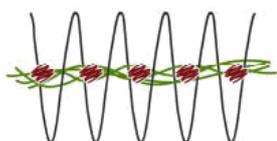
The Kirkcaldy TCRF scheme was predominately focussed on making streetscape and public realm improvements with the hope that higher end retailers will be attracted. However, the team realise that the improvements will only go so far. It is hoped that in due course the development of the Strategic Land Allocations will also help to attract new residents and therefore investment to the town centre.

The Jedburgh TCRF scheme has helped move things forward in the town and indirectly contributed to the legacy of strengthened community leadership. The fact though, that significant town centre asset has been purchased but that its future use and refurbishment costs are still to be determined suggests that long-term development still remains to some

degree a 'leap of faith' dependent on securing investment for future stages.

The evaluation of TCRF acknowledged that the process had some inherent weaknesses as a result of the tight bidding and delivery timescales. The 'pivotal' nature of TCRF is acknowledged in the case studies in that some projects would not have proceeded or would have progressed much more slowly without TCRF funding.

11 The Upper Calder Valley Renaissance, West Yorkshire and Yorkshire Forward Renaissance Market Towns Programme



UpperCalderValleyRenaissance
weaving it all together

Summary of Key Learning Points and Implications for Practice Elsewhere

The Upper Calder Valley Renaissance (UCVR) as part of the Yorkshire Forward Renaissance Market Towns (RMT) Programme was a ground-breaking initiative in a number of ways that is often referenced with variable degrees of understanding and accuracy. This case study seeks to objectively and accurately capture key learning points from UCVR's pioneering approach to taking a coordinated and area-wide perspective on town regeneration. This was underpinned by a commitment to long-term planning, significant injections of public funding and access to a support programme aimed at building the capacity of local 'town teams'. Though ambitiously proposed as a 25 year approach, the fact that events have conspired to at least temporarily stall its forward momentum, in some senses only adds to the learning points around the design and management of area-based regeneration initiatives and relationship with public funding programmes elsewhere.

Key lessons to be gleaned from this case study relate to: The effectiveness of targeting coordinated interventions in five neighbouring towns; the value of combining community capacity building, key enabling projects and long-term investment planning; the extent to which increases in local community capacity resulted from the associated support programme or an existing culture of self-reliance; reflections on timescales necessary to achieve both an independence of institutions able to lead a local renaissance and a 'tipping point' in renewing the economic viability of the respective town centres.

Location, Scale and Context



The Upper Calder Valley

The Upper Calder Valley Renaissance was the first scheme undertaken as part of the Renaissance Market Town Programme that was funded and managed through the Regional Development Agency Yorkshire Forward. The scheme was unusual in covering the 5 towns

of Walsden, Todmorden, Hebden Bridge, Mytholmroyd and Sowerby Bridge and as such it was also one of the largest. The towns are situated in a line along 14 mile stretch of the Upper Calder Valley in West Yorkshire, and are well-served by the Calder vale rail line and major arterial routes to Leeds, Manchester and central Lancashire.



The Renaissance Market Towns Programme was a new approach initiated by Yorkshire Forward to improve the attractiveness and quality of life of small towns through the provision of appropriate housing, transport services and a quality public environment, encouraging and retaining economic activity in rural areas. The RMT programme operated across pre-selected towns and their hinterlands from 2002 to the abolition of the RDA in 2010. The Yorkshire Forward investment over this period was £34million across 13 individual or clusters of towns across the Yorkshire and Humberside region.

Description of Governance and Funding Structures

The Upper Calder Valley Renaissance programme was initiated in 2002 when Yorkshire Forward commissioned consultants John Thompson & Partners to undertake the biggest consultation exercise ever seen in the area and involving more than 2,000 individuals, organisations and businesses.

From this process an inspirational 90 page report was produced that included a vision, charter and masterplans for the Valley together with summaries of the strategic aims and actions¹².

This report looked at how the Valley and its settlements could be transformed over as long as a 25 year period in-line with the following Valley Vision:

"To create a connected, creative, and sustainable Valley by redefining the role of its Market Towns through a people based process of physical, symbolic and virtual change, building upon the talents of the people and the quality of the built and natural environment."

Beneath this headline vision, the report set out aspirations for an holistic approach in terms of joining-up the Valley geographically and with unifying themes that included: the built environment; valley setting; rural economy; communication; housing; transport; sustainability; diversity and community involvement.

The names of the Town Teams for each of the Upper Calder Valley Renaissance towns are:

- Sowerby Bridge Community Forum
- Royd Regeneration (Mytholmroyd)

¹² John Thompson & Partners, 2003. *Upper Calder Valley Renaissance*. Available at: <http://www.ucvr.org.uk/userfiles/file/UpperCalderValley.pdf>

- Hebden Bridge Partnership
- Todmorden Pride

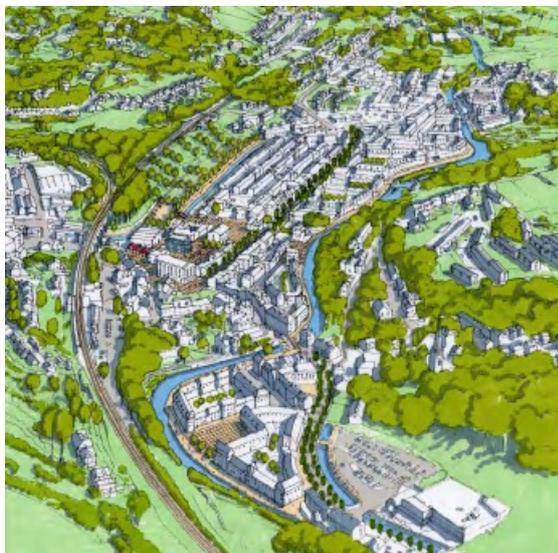
In most cases, these community-based organisations pre-date the Renaissance programme and there is a history of community self-reliance and enterprise in the area which is exemplified by the Birchcliffe Centre, Hebden Bridge and the Pennine Heritage Trust. An addition to this existing independent 'town teams' was the formation of an Upper Calder Valley Renaissance Steering Group which met quarterly to coordinate activity and comprised of town team members, Calderdale Council officers and local councillors.

Pattern of Problems Targeted

The Calder Valley was historically an important industrial area employing large numbers of workers in cotton mills spread throughout the area but the industry has been in decline since the middle of the last century. The 2003 report describes how this initially this led to redundant buildings and population decline. During the 1970s however, many incomers came to settle in areas of the Valley, taking advantage of cheap property prices and either starting new businesses or commuting to Leeds, Manchester and other larger towns and cities. More recently there has been a demand for new homes and property prices have risen sharply in many, but not all, areas of the Valley.

In terms of the five towns and their centres, the reports placed a strong emphasis on re-inventing the role of their High Streets and market places as arenas "for exchange and connectivity: cultural, creative, civic, spiritual, virtual, intellectual and economic."

There was a very strong emphasis on local identity in terms of products, ideas and involvement to create a "21st century image for the Valley". It was determined that land use and growth of each town should be defined and proactively planned for through masterplanning with a strong emphasis on improving the quality of their public realm and removing blight.



Todmorden Town Centre
The market building and the Town Hall sit in a gap of old parking. The Town Hall is taken from the square behind a 1960s 'Newlook' building. Poor quality public realm and dead footpaths contribute to the bleak feel of the town centre. The town turns its back on its two greatest assets, the river and the canal.



Bransholme Square Transformational Project
Bransholme Square should be transformed into a place for people, not cars. The new building on Bridge Street should be demolished to open up a new vista between the Town Hall and the Methodist Church. The proposed new Creative Media Centre, in a prominent location in the centre of the square, will act as a catalyst for the economic regeneration of the town.



Rejuvenating Land Use
Vacant and underutilised sites and buildings in the valley are generally located close to the river and canal, and often enjoy superb views of town centres. One such example is the area opposite the Green Mill of Tod, where there are large areas of derelict buildings and vacant sites, and poor quality public realm along the canal tow path.



A New Milestone Riverside Development
The area opposite the Green Mill of Tod could be transformed into a new urban neighbourhood with housing built on the bank of the towpath and overlooking a new canal-side square. The neighbourhood could contain a mixture of uses and could include workshops, offices, live/work units and a variety of housing types and tenures.

Description of Interventions

The RMT sought to serve as a catalyst for change by combining the imposition of a structured, long-term planning process with local animation at the community level. The RMT programme sought to work with pre-selected towns across the region, beginning with an intensive initial year of capacity development and master planning, with the local community, to establish a long term vision for the town with deliverable projects/interventions. Through the establishment of a 'Town Team' consisting of local residents, the business community, public and community/voluntary sector representatives and through dedicated support from the public sector, the objective was to deliver sustainable change that can support regional economic objectives and contribute positive economic impacts.

RMT activity in specific towns or areas was supported by a wider regional support programme involving a partnership skills training programme; mentoring support; study tours; interim project management assistance and a series of research projects covering issues such as future scenario planning, car parking strategy and low carbon economies. Evaluation of this wider support programme¹³ recognised that it was an important contributor to developing sustained regeneration activity with benefits that included:

- Enabling the joining up of fragmented local regeneration activity
- Opening up regeneration to a much wider group of activists through the structure of a Town Team within which to contribute;
- Providing partnership and personal capacity development within community groups and local authorities.

Key Successes

Key initial 'renaissance' projects identified in investment plans and undertaken within the towns in the Upper Calder Valley, have focused on the improvement of the public realm:

- **Hebden Bridge** - pedestrianisation, removal of vehicular access and improved accessibility for all in the town-centre area.
- **Bramsche Square** - creation of a new 21st-century marketplace to stimulate the economic regeneration of the town and its hinterland.
- **Sowerby Bridge Copley Valley** - creation of a new mixed-use development at Copley Valley, with links to improvements to the town centre.
- **Sowerby Bridge Market** - development of a new market in the heart of Sowerby Bridge, currently the most sustainable market in Yorkshire.
- **Ted Hughes Project, Mytholmroyd** - acquisition of the poet laureate's birthplace plus development of festivals and a sculpture trail in and around the town.

¹³ Genecon, 2010. *Evaluation of the Renaissance Market Towns Programme-Final Report*. Available at: <http://towns.org.uk/files/RMT-Evaluation-Final-Report-2010.pdf>

- **Fielden Wharf, Todmorden** - creation of new public space and a vista of the newly restored Rochdale Canal through the demolition of a redundant building in the conservation area, and new public realm
- **Shared Space, Mytholmroyd** -an innovative project which offers a flexible space for events and car parking, together with an enterprise centre and a community hub, that provides a popular new centre for the town.



Fielden Wharf, Todmorden

Pedestrianisation, Hebden Bridge

Shared Space, Mytholmroyd

These projects represent lasting improvements to the town fabric that boost a renewed sense of place and contribute indirectly to the economic well-being of the town and businesses. There is a sense that they were a 'stepping stone' towards increasing the capacity and local leadership of the town teams. They were not though of a nature that helped underpin the financial viability of community-based enterprise or necessarily would attract significant inward investment even in buoyant times. This left continuation of the Renaissance programme dependent on significant levels of continued of public funding, ahead of a period of unforeseen change.

Barriers to Progress and Failures

In May 2010, the new UK Coalition Government announced the abolition of Yorkshire Forward and thereby an end to funding through RMT.

A conference held in June 2010 in Mytholmroyd to review seven years' progress in the Upper Calder Valley¹⁴, took place against this background of how the funding vulnerability of the approach and dependence on public sector 'investment' had been exposed. A switch in emphasis to focus on delivering small, incremental change was presented as a necessary, new way forward. Whilst recognising many positive achievements, the conference also reflected a sense of frustration about delays in planned work and a lack of information that suggested that the Renaissance was not yet fully embedded within or led by the local communities.

There are notable examples of recent achievements in the towns since 2010 including a £3million asset transfer and refurbishment of its Town Hall by Hebden Bridge Community Association Ltd. To what extent such activity and the capacity of the 'town teams' and local

¹⁴UCVR, 2010. *Masterplan Review Conference Report*. Available at: <http://www.ucvr.org.uk/userfiles/UCVR%20MRC%20Wkshop%20comments.pdf>

organisations has been boosted by RMT activity -or vice versa -remains unclear however. The evaluation of the wider Yorkshire and Humber Renaissance Market Towns support programme in 2010 concluded that there was a lack of quantifiable evidence to help determine how effective the training and community capacity elements had been.

Timescales and Developmental Trajectory

Although it is accepted that the Renaissance philosophy is a long-term approach that can take 25 years to come to fruition, the abolition of Yorkshire Forward highlighted the dependence on public funding to drive the town investment plans forward, especially when recession limits private investment. A web-based review of minutes of town team meetings hosted on the Upper Calder Valley Renaissance web sites suggests that they are all still active and seeking to deliver continued change in their communities. It is not though apparent to what extent the UCVR Steering Group still performs a coordinating role or that discussions are led by the content and aspirations of the existing town investment plans. It would seem that the regeneration in the Upper Calder Valley will be more 'organic' in the foreseeable future and dependent on the intrinsic capacity for self-reliance from its communities and on strategic support from Calderdale Council.

Executive Summary

Introduction

This report examines the lessons learned from existing projects and programmes in the seven Regeneration Areas (and Newport Urban Regeneration Company) in relation to the Welsh Government's commitment to focus on town centre regeneration. This is achieved by addressing four study objectives.

1. Evaluating local impact and value for money¹;
2. Considering how a strategic, partnership approach adds value to town centre regeneration;
3. Making recommendations about the types of interventions which should be prioritised to optimise impact and value for money;
4. Comparing delivery against similar interventions across the UK and beyond.

Approach

The approach taken to the work comprised three main elements:

1. **Delivery and Impact: data gathering.** This element mainly comprised:
 - A desktop review of contextual policy, Regeneration Area documentation and qualitative data on key town centre indicators;
 - Qualitative interviews and workshops with Welsh Government and related agency staff, Regeneration Area delivery teams, town centre groups and beneficiary businesses;
 - Online, quantitative survey of Regeneration Area stakeholders.
2. **Data analysis of town centre performance.** This comprised:
 - Review and analysis of quantitative town centre data in the context of information gained above;
3. **Case study development**, for each of the seven Regeneration Areas (and Newport Urban Regeneration Company);
4. **Comparator research**, using case studies from elsewhere in the UK.
5. **Reporting:** Compilation of this overview report and associated technical appendices.

Impact and Value for Money

Evidence of Impact

The research illustrates that there is significant variation in both the focus of investment and the progress made to date across Regeneration Areas, reflecting factors such as their scope and the maturity of the partnerships. There is also considerable variation in the availability of standardised data to monitor basic vitality and viability indicators, such as footfall and vacancy rates and no common template in place to secure such information. However, national datasets can be combined with the data available from Regeneration Areas to provide some insights into relative performance in Regeneration Area town centres which demonstrates their role as key service centres as convenience and comparison retailing tends to be relatively under-represented.

¹ Note that there are individual, longer-term evaluations being undertaken of all major town centre schemes and this report does not intend in any way to second guess their outputs. Rather, it provides an overview of the approaches taken, and any early emerging impacts especially in relation to partnership and behaviour change.

Vacancy data from across all Regeneration Area town centres suggests that although larger centres such as Swansea and Newport have performed relatively poorly in relation to footfall and vacancy rates, the majority of (smaller) Regeneration Area towns have in general maintained or increased footfall over the period and have now converged with UK average vacancy rates. This seems to suggest that some small town centres have proved more resilient to the recession than their larger counterparts, although there are some significant challenges facing these smaller town centres in terms of out of town retail, perception issues and accessibility, amongst other factors.

The implications of this may be that for smaller towns to compete more effectively, they need to continue with local investment plans and enhance the quality of offer within the existing model, develop their local identity and key selling points.

There is also a need in future town centre monitoring to also recognise that in addition to collating retail datasets that a more enriched and holistic set of data needs to be captured in terms of community, cultural, enterprise and well-being type indicators which will help shape the future role of our town centres.

Online survey results show that town centres have been the main focus for around half of all Regeneration Areas, with main issues relating to external perceptions and the lack of an attractive offer to visitors, along with more familiar concerns about vacancy rates and, maintaining or developing the retail mix, which has been identified within the town centre data analysis. Regeneration Areas were seen as being successful in enabling the targeting of resources and in developing collaboration at a strategic level. Respondents were more sanguine, however, about their relationships with local communities and whilst physical activities such as public realm and building improvements were well rated, there was little recognition of the benefits of softer approaches, such as skills development or capacity building amongst the business community. This potentially reflects the focus by Welsh Government on capital funding with only limited revenue funding support made available by some Local Authorities.

Overall, however, there was strong agreement from practitioners that Regeneration Area town centres were more resilient than other towns and that investment through the Regeneration Area process had levered investment and improved these town centres.

As background to recommendations about future town centre interventions, the report defines the criteria for optimising local impact and value for money.

Optimising Impact

To be able to optimise the impact of town centre regeneration it is essential that there is clarity of vision and of the desired outcomes for individual towns, within the wider context of Regeneration Areas. This involves consideration and understanding of:

- an assessment of baseline indicators; the breadth of outcomes sought;
- targeted beneficiaries and the commercial and socio-economic context;
- an appreciation of the inter-relationship between a town and its neighbours;
- a realistic sense of the potential improvements and desired outcomes for the town - the so-called 'town trajectory'.

It is helpful to summarise the inter-relationship of these various criteria as a matrix to define desired outcomes and determine appropriate interventions and monitoring.

Achieving Value for Money

Value for money in this context is defined as achieving lasting impacts from funding and the influence achievable through working in collaboration. Factors that affect value for money achieved extend from routine housekeeping to establishing a lasting legacy from interventions and considerations and include:

- management and administrative overheads;
- preparation of realistic investment plans;
- effectiveness of leveraging-in additional funds;
- ability to generate a self-financing returns on investments and;
- the capacity to take a town's 'trajectory' beyond its 'tipping point' so that 'need' becomes 'opportunity'.

Such criteria for determining value for money in delivering holistic regeneration outcomes can be developed as a checklist to guide programme development, management and assess investment proposals.

Partnership Working and Added Value

The report considers criteria for determining the extent to which a strategic, partnership approach can be applied across geographical, organisational and sector boundaries and the following approaches are proposed:

- collaboration with key partners to prepare area-wide regeneration frameworks;
- working across other Government and local authority departments through 'town centre proofing' and 'bending expenditure';
- working as active partner members within individual towns and helping to provide specialist, national advice and share good practice between towns.

Recommendations for Future Interventions

Against this background of guidance on optimising impact, value and partnership working, the report makes recommendations about the types of interventions which should be prioritised by the Welsh Government to deliver town centre regeneration. In doing so, the recommendations are consistent with the changing focus of regeneration in Wales from physical enhancement towards more integrated approaches and offer an opportunity to advance Welsh Government policy and practice in relation to other departments and sectors; as well as the improvement of towns across Wales.

A list of recommended interventions is presented as a necessary sequence of activities to ensure optimum impact and value for money in delivering town centre regeneration:

Understanding Your Towns: Baseline data for monitoring & management

An essential prerequisite to undertaking regeneration in any town centre, should be to 'understand the place' by collecting key indicators that provide baseline data that can be monitored annually to track progress and influence decision-making. Importantly this information should be manageable to collect and be accessible and understandable to a range of stakeholders in a town and enable comparisons between towns. This understanding of place will involve:

- setting economic benchmarks;
- developing 'enriched' indicators;
- recognising different types of town and measuring and managing progress.

Integrated Regeneration and Investment Planning

Through its regeneration work, the Welsh Government is well-placed to coordinate town centre regeneration as a complex process dealing with interrelated issues that are driven by the wider economy and other social and environmental factors. From the review of existing SRA practice undertaken here and with reference to comparator studies, key factors to consider in this integrated planning are:

- agreeing a clear vision, strategy & action plan;
- looking beyond physical investment;
- understanding 'town trajectories';
- foreseeing a changing context.

Local Partnership Building and Organisational Development

An important part of meeting the Welsh Government's objective of optimising the impacts and value for money from town centre regeneration is to facilitate delivery through a holistic and collaborative approach. This requires coordination with partners and across sectors through engagement, empowerment and clarity of roles and responsibilities. The menu of approaches available to the Welsh Government to help embed such partnership building and local organisational development include:

- facilitating locally-led planning;
- developing cohesive partnerships;
- creating local delivery bodies with the right mix of skills.

Strategic Planning and Development Control

The spatial focus on town centres offered by Welsh Government involvement in the Regeneration Areas provides an opportunity to test and develop national policy and local practice in relation to strategic planning and development control:

- formalising strategic understanding;
- planning for 'town-centres-first' or for complementary and managed change.

Application of Regeneration skills

In tackling current issues and opportunities in town centres, there is a call from town centre regeneration delivery bodies and practitioners for a mix of technical, cross professional skills and softer skills that enable holistic town centre regeneration including:

- sharing expertise in physical regeneration;
- developing capacity for acquisition/land assembly;
- promoting and developing 'softer' skills;
- creating a property/land development advisory panel.

Creative retail growth & support

A creative approach is needed to find viable new and transitional uses for empty premises that should include:

- the flexible application of business rates;

- creating new and transitional uses for empty shops;
- forming a pan-Wales approach to enabling 'meanwhile' use.

Development and Inward Investment

Commercial retail investment is becoming increasingly polarised towards major and often sub-regional town centres, with the middle ground/traditional district centres potentially having an uncertain future. In devising future vision and strategy for town centres, partners must be realistic about the commercial development and investment and this could involve re-designing the focus of town centres and stimulating new local/independent businesses.

Managing Transition and Maintaining Momentum

It is important to recognise the current time as a period of transition for the Regeneration Areas and for the Welsh Government to take a leading role in ensuring that the momentum achieved is maintained. Without this there is a risk of instability and that some of the recent gains might be lost or set-back. It is recommended that the Welsh Government can assist with a smooth transition in the Regeneration Areas by:

- investing in need and effectiveness;
- supporting transition;
- maintaining 'special' status.

Comparator Evidence

The comparator studies from Yorkshire and Scotland capture learning points from programmes of a comparable scale and budget; whilst the Flintshire example demonstrates what can be achieved by a strategic approach to town centre regeneration in Wales outside of the Regeneration Areas.

Key lessons gleaned include: the importance of longer-term preparatory work in developing a shared town vision, strategy & action plan; the value of integrated delivery combining quick win projects, community capacity building and long-term investment planning; and the effectiveness of coordinating interventions between neighbouring towns in a way that recognises their distinctive roles. Civic leadership needs to nurture over a long period to be able to deliver agreed action plans and physical regeneration should be matched by other types of intervention and skills including enterprise support, marketing and events promotion.

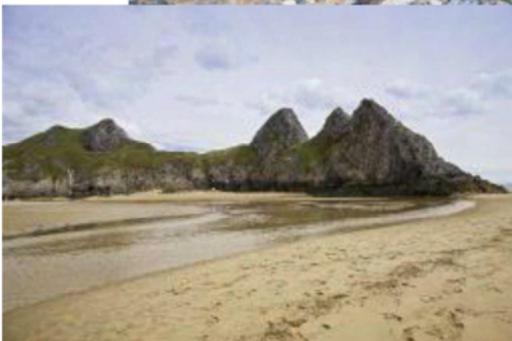


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research evaluation surveys



An Evaluation of Current Practice in Relation to Seaside Town Regeneration

Annexes

A report by Wavehill Ltd and Planning Solutions Consulting Ltd for the Welsh Government

October 2012

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Annex 1: Visitor, Resident and Business Surveys

1.1. Seaside Towns Evaluation Programme: Business Survey

Wavehill, in partnership with Planning Solutions, has been commissioned by the Welsh Government to get the view of businesses on regeneration and development activities in Aberystwyth. Over the past 2 years, the Welsh Government has invested in a number of projects to revive seaside towns; locally this has included for example, improvements to pedestrian routes link the city centre to the waterfront and the marina. The aim of this research is to assess the impact of this investment. As a business based in the town, we are keen to get your views on how you think the town has changed over the last couple of years.

Business background

1. Please could you tell me your name and name of your business?

Interviewee Name	
Business Name	
What is your main business activity?	

2. Are you the owner of the business (if not) – what is your role within the business?

Owner	
Other – please state role	

3. For how long have you been trading in

Less than a year	
1 year	
2 -5 years	
Over 5 years	
Not sure (employee)	

4. In terms of your business, over the last 2 years, has your business performance:

Improved	Worsened	stayed the same	Not sure (employee)

5. How would you describe trading conditions over the last 2 years?

Awareness of regeneration activities

6. The Welsh Government, Council and its partners are undertaking a major programme of physical enhancement works to improve the area. Were you aware of these plans at all?

Yes	No

Are you aware of any the following improvements to the town and / resort?

7. Improvements to the seafront / promenade – The promenade improvements for example

Aware	Not aware

7a. Any comments?

7b. In your opinion, has this been positive for?

	Yes	No	Don't know
Your business			
The community			
The local economy			

7c. Any comments?

--

8. Improvements to the physical appearance of the town – The town improvement grants for example

Aware	Not aware

8a. Any comments?

--

8b. In your opinion, has this been positive for?

	Yes	No	Don't know
Your business			
The community			
The local economy			

8c. Any comments?

--

9. Improvements to the housing (stock and conditions)

Aware	Not aware

9a. Any comments?

--

9b. In your opinion, has this been positive for?

	Yes	No	Don't know
Your business			
The community			
The local economy			

9c. Any comments?

10. Improvements to the shopping environment

Aware	Not aware

10a. Any comments?

10b. In your opinion, has this been positive for?

	Yes	No	Don't know
Your business			
The community			
The local economy			

10c. Any comments?

11. Improvements to transport and Accessibility – Improvements to the routes between the town centre and Penglais for example

Aware	Not aware

11a. Any comments?

11b. In your opinion, has this been positive for?

	Yes	No	Don't know
Your business			
The community			
The local economy			

11c. Any comments?

12. Improvements in Aberystwyth as a family resort providing facilities and activities for visitors to the town – Ffoto Aber and the Halfords Tour Series for example

Aware	Not aware

12a. Any comments?

12b. In your opinion, has this been positive for?

	Yes	No	Don't know
Your business			
The community			
The local economy			

12c. Any comments?

--

13. Do you think the improvements will make Aberystwyth a more attractive place to visit?

Yes	No	Don't know

13a. Why do you say this?

--

Satisfaction

14. Bearing in mind the size of Aberystwyth, how would you rate it for each of these? Could please indicate by stating very good, good, poor, very poor, neither good nor poor or don't know

	Very good	Good	Poor	Very poor	Neither good nor poor	Don't know
a) Place to live						
b) Place to visit for leisure / entertainment						
c) Place to work						
d) Place to shop						
e) Place to study						

Future priorities

15. What elements of Aberystwyth should be celebrated / promoted more?

--

16. What three things would you like to see happen to improve Aberystwyth as a place to live, work and visit?

17. Any further comments you wish to make about the improvements?

1.2. Seaside Towns Evaluation Programme: Visitor/ Resident Survey

Wavehill, in partnership with Planning Solutions, has been commissioned by the Welsh Government to capture views about the town of Aberystwyth. Over the past few years, the Welsh Government has invested in a number of projects to revive seaside towns; we are keen to get your views on the town; what are the best bits and what could be improved. All responses will be treated confidentially

1. Are you:

A resident of the town (go to Q2)	A visitor to the town (go to Q14)

Residents - Only

2. How long have you lived in Aberystwyth

--

3. Bearing in mind the size of Aberystwyth, how would you rate it for each of these? Could please indicate by stating very good, good, poor, very poor, neither good nor poor or don't know

	Very good	Good	Poor	Very poor	Neither good nor poor	Don't know
a) Place to live						
b) Place to visit for leisure / entertainment						
c) Place to work						
d) Place to shop						
e) Place to study						

4. And over the last 2 years for each of the above elements would you say the town has Improved, Worsened, Stayed the Same, or Don't know

	Improved	Worsened	Stayed the Same	Don't know
a) Place to live				
b) Place to visit for leisure / entertainment				
c) Place to work				
d) Place to shop				
e) Place to study				

5. The Welsh Government, Council and its partners are undertaking a major programme of physical enhancement works to improve the area. Were you aware of these plans at all?

Yes	No

How aware are you of the following improvements to the town and / resort?

6. Improvements to the seafront / promenade - The promenade improvements for example

Aware	Not aware

- 6a. Any comments?

7. Improvements to the physical appearance of the town - The town improvement grants for example

Aware	Not aware

- 7a. Any comments?

8. Improvements to the housing (stock and conditions)

Aware	Not aware

- 8a. Any comments?

9. Improvements to the shopping environment

Aware	Not aware

9a. Any comments?

10. Improvements to transport and Accessibility - Improvements to the routes between the town centre and Penglais for example

Aware	Not aware

10a. Any comments?

11. Improvements in Aberystwyth as a family resort providing facilities and activities for visitors to the town - Ffoto Aber and the Halfords Tour Series for example

Aware	Not aware

11a. Any comments?

12. What elements of Aberystwyth should be celebrated / promoted more?

13. What **three** things would you like to see happen to improve Aberystwyth as a place to live, work and visit?

--

--

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Now go to Q21

Visitors Only

14. Where are you visiting from?

Wales – Please state local authority, RCT, Gwynedd etc...	
Country – Please state England, Ireland, Scotland etc...	

15. Is your visit here for – Tick all that apply

Business	
Leisure	
Family	
Other – Please state	

16. Are you staying in the town of Aberystwyth locally?

Yes	
No (go to Q12a)	
Not staying (day visit only)	

16a. If no, which area are you staying?

--

17. How often have you been to the town before:

This is my first time (go to Q19)	Several times or more (go to Q18)

18. **For repeat visitors only:** - Over the last few years would you say the town has:

Improved	Worsened	Stayed the same	Don't know

19. In your opinion, how would you rate the town as a place to visit?

Very good	Good	Poor	Very poor	Neither good nor poor	Don't know

20. What three things would you like to see happen to improve Aberystwyth as a place to visit?

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FOR ALL

Q21. Name:

Q22. Age

Q23. Gender

Male	
Female	

Annex 2: Verbatim Responses to Surveys

1.2 Aberystwyth - Visitor Survey

What three things would you like to see happen to improve Aberystwyth as a place to live, work and visit?	
Better road networks	Keep the hospital open
Cheaper rail fares / more carriages.	Less CCTV
Cheaper rail fares / more carriages.	Less CCTV
Cleaner	M&S (no others)
Cleaner	More available housing for students and quality of student housing.
Cleaner	More available housing
Cleaner	More emphasis on welsh language - bilingual to give sense of place.
Cleaner	More entertainment
Cleaning rubbish.	More entertainment
Doing a great job of keeping it tidy.	More entertainment
Emphasise the Welsh	More facilities for young people.
Feed seagulls in certain areas only.	More jobs
Houses repainted	More jobs
Houses repainted	More litter clearance.
Houses repainted	More police
Improve promenade	More police
Improve promenade	More police to tackle the drugs and drink problem.
Improve promenade.	No cuts to hospital.
Improve the mess made by seagulls.	No trips in bay. Students turn houses into bedsits. Bandstand orchestra should return. Kings Hall - Glen Miller. Day centre move back.
Improve the parking	Painting buildings on promenade.
Improved shops and shopping	Reduce number of seagulls
Improved shops and shopping	Reduce number of seagulls
Improved shops and shopping	Terrible streets.
Improved shops and shopping	The state of some houses on the promenade is very poor.
Improved shops and shopping	Too many empty buildings
Keep Bronglais, and psychiatric wards. Now the patients and doctors go to Carmarthen.	Too much car vandalism at the moment.
Keep the hospital open	

1.3. Aberystwyth – Business Survey

How would you describe trading conditions over the last 2 years?	
Awful - less people coming to Aber. Internet taking over and so people rent less videos / DVDs	Ok - university clothes/school uniform. People will come in if they need our things.
Because of recession - well supported by community.	Our trade has held up because we operate a cash for gold scheme. This has really taken off in the last 3 years.
Because of wardens, nobody can park outside of shops.	Out of town supermarkets affect us. Parking problems.
Challenging because of weather, recession, Olympics and jubilee affecting visitors	People buy fewer things. Tourism going on but people not spending money so not very good.
Diabolical due to the lack of parking in the town centre.	Poor
Different kind of business now - used to bake. Buy the equipment now.	Poor - because of the recession and the weather over the last 2 summers.
Difficult	Poor - Not enough people. Not enough tourism.
Difficult because of recession. Spontaneous shopping does not happen anymore.	Positive trading conditions - only been open 5 months.
Difficult to judge as we have only been open a short time.	Pretty difficult
Dire	Pretty good, but only here 6 months.
Dire due to the recession and antiques are not as popular. Aberystwyth is not getting the footfall now. The council offices moved out of the centre and parking is difficult.	Pretty steady
Don't know	Quieter
Employee - don't know	Quieter - all streets are quieter
Erratic	Recession has had an impact. Good customer service - they love that. Our clientele are tourists and elderly so it's good.
Every year improved. This year bit worse, but because of scaffolding etc.	Rent gone up and business rates are up.
Extremely difficult.	Slow because of parking and traffic wardens and weather recently.
Felt recession.	So, so. Some days are good, others are not so good.
Floods had a huge impact - all environmental things have had an impact but we have a loyal customer base.	Spending less money - recession. Elderly are usual clientele, and they are scared because of the economy.
Fluctuates, - quiet periods	Standard. Students and tourism usually - constant
Fluctuates, but improving. Steady with the fish spa.	Steady
Footfall on streets very low. Have talked to council about getting proper signs - could be marketed as the independent sector, but nothing has been done.	The parking restrictions have stopped donations to the shop.
Good	Things are developing. I'm getting established.
Good and steady	Tough due to the recession.

How would you describe trading conditions over the last 2 years?	
Hard	Trading has been good.
Hard now	Up and down.
Harder because of the recession.	Very difficult - due to less footfall in the town centre.
It doesn't get easier.	Very difficult due to the economic climate.
It's a new business.	Very difficult.
Just opened.	Very difficult... Made worse by over the top business rates. Every year they go up and I don't receive any extra service! Things cannot go on like this; the town will be left to huge corporate bland businesses, at the expense of the independent trader.
Last few months picked up but noticed a drop. Company in administration but this store makes profit.	Very slow, not much foot fall.
Lower footfall in Aberystwyth in general. Fewer visitors to the town. Less passing trade.	We are a charity shop so ok. (But because of floods not as many donations).
Less people coming in to town.	We have only recently opened but it has been positive so far.
Not very good - rates and credit crunch	Weak

What elements of Aberystwyth should be celebrated / promoted more?	
Seafront	Welsh culture. Safe and relatively crime free.
Seafront	Seaside
More family friendly	Nightlife
The whole town. The more activities they do in town the more people will come. The local independent shops.	The promenade needs more activities.
Natural beauty. What you can do at no cost - coastal path etc.	The seafront.
Sea front town	The seafront.
Promenade. The fact that we have biggest number of pubs ...	Its period quality and historic dimensions.
The University	The promenade.
The heritage of the town	The seafront. The National Library.
The commercial side of the town	The seafront.
Promenade and castle	The seafront and promenade.
Streets and the shops in the middle of town.	More work should be done to develop the promenade and the town centre.
Not a lot in town centre.	There should be more activities on the promenade and have a face culture there.
Should promote the beach, walks, views and entertainment.	The seafront. We need seafront restaurants and maybe a seafood festival.
Leisure	The promenade.

What elements of Aberystwyth should be celebrated / promoted more?	
Castle.	The marina and harbour area should become a destination with cafes and shops and seafood.
Don't know	The natural beauty of the area.
Sea front	The sport and leisure aspects of the town.
Shopping	The seafront and activities there.
University. Family resort. Nice place to have a day out. Coast and constitution hill. Surrounding areas e.g. Devils Bridge.	The independent shops, the seafront, low crime rate.
Arts Centre as they do things for community. Not much advertising.	The promenade.
More national shops. Aberystwyth as a customer friendly environment including parking, and as a shopping environment, and as a resort.	The beauty of the place.
University. Beach (if it was done up). Constitution Hill.	Seafront
Fact that there are a lot of independent, unique shops. 2 Welsh language bookshops. National library. Shops in Aber that are not accessible anywhere else.	Tourism - something for them to do when it's wet. Needs to be marketed more.
Promenade. Penglais area - arts centre.	The places to eat - there are lots in Aberystwyth.
Relationship between sea and town.	The town's individual character.
Natural beauty.	Independent retailers and seafront.
Promenade, seaside, shops.	The beach.
Seafront	The events are not publicized at all.
High Street	Local businesses / attractions for e.g. library / university.
Beach. Not a lot to promote.	The new M&S needs to be in the middle of town - not on the outskirts.
Coast	I like the fact that Aberystwyth doesn't have for e.g. fun fairs. I think the local shops should be promoted more.
Attraction e.g. railway, museum, castle. Base for exploring countryside, coastal paths. Specialist shops e.g. art, toys, and sweets.	Aberystwyth is the cultural capital: Art centre/University/Galleries.

What three things would you like to see happen to <u>improve Aberystwyth</u> as a place to live, work and visit?	
A greater variety of big stores.	More indoor activities for kids.
A lot more positive marketing. Continue to develop town centre.	More indoor activities for locals and visitors alike.
Activities for children, indoor activities. Too many things are near the University rather than in town.	More indoor entertainment for families with children.
Attractions for families	More leisure
Beach entertainment - to emphasize that Aberystwyth is a port town.	More leisure activities
Better bus system.	More local shops.
Better car parking facilities	More long stay parking (e.g. all day spaces).
Better entertainment e.g. a large multi-screen cinema.	More outdoor activities for the public (if possible free).
Better mix of some larger companies to compete with other towns like Carmarthen.	More parking areas in the centre and more reasonably priced parking.
Better nightlife	More parking.
Better nightlife - clubs.	More places to go to when it's raining
Better parking	More quality shops in the centre.
Better parking	More refurbishment and maintenance of buildings.
Better parking	More shopping. Public transport.
Better parking - storey.	More shops
Better parking (better management of the parking facilities). There should be free parking at Christmas.	More shops - especially considering we have students here.
Better parking in the centre of town.	More shops.
Better parking.	More shops. Make it more relaxed like Llandudno e.g. can have a drink outside. Cleaning. Public toilets in centre of Aberystwyth.
Better restaurants.	More street parking with fewer restrictions.
Better shopping centre.	More stuff to do.
Better shopping. More independent and big store shops.	More support for arts - art galleries etc.
Better shops	More things for kids to do.
Better shops.	More things to do
Better town centre parking.	More things to do - more advertising about what there is to do.
Big shops. Nothing to do if you're here for more than a few days.	More town centre parking spaces.
Bigger cinema	More vibrant and accessible town centre.
Bigger shops	More with the band stand
Bigger stores - shops	Move the market to the seafront and expand it.
Boost business - increase tourism.	Multi-storey car park
Business rates are far too high for small businesses.	Need M&S in Aberystwyth

What three things would you like to see happen to <u>improve Aberystwyth</u> as a place to live, work and visit?	
Business rates are too high - many small businesses will not survive.	Need more activities.
Car parking - unless this is improved, improvements to town will have little impact on business	New attractions for tourists.
Change seafront to shops, not housing.	New housing (all student accommodation at the moment).
Cheaper rates for local small shops.	No jobs, except for shops. More housing and support for getting people into stable work _ lots of drugs and prostitution.
Clean beaches.	Not answered
Clean up the streets of alcoholics and drug addicts.	Not enough for young people (younger than 18). Only pubs here.
Cleaner - everybody should maintain their property.	Not enough shops - big chains won't go bust as easily.
Clothes shop	One of the main problems = wages have been suppressed for years, major discrepancies with wages in Aberystwyth.
Community Hall for young people aged 14 - 18. They hand around in the shop.	One way systems in the centre
Constitution Hill is a gem but needs to be made safer and more attractive.	Parking
Council need to deal with chewing gum issues and seagull breeding is out of hand.	Parking
Council to be more lenient with bigger stores.	Parking
Day centre/community centre in town. Skate park.	Parking - not enough time - should be like Carmarthen. Business rates same in Aberystwyth as in Cardiff/Manchester - has to increase prices.
Decent shops - M&S.	Parking - signposting to car parks from centre of town.
Don't look after tourism, depends on students.	Pedestrianised street (main street) - covered up. More seating for elderly. Allowing more shops - not just the big ones.
Facilities - indoor activities.	Places to take children.
Family activities - more of them.	Planning authority should encourage new business setting up - they don't!
Fewer students.	Promenade
Fish market - selling fresh fish - caught here!	Promote the front more - promenade
Get rid of charity shops in the middle of Aberystwyth.	Public transport - trains, hourly service, promised but hasn't happened.
Get rid of the seagulls (cull)	Reduce business rates and encourage people to start business. Need more public toilets. Not enough bins.
Getting the bigger supermarkets - not enough competition, some shops get the monopolies.	Reduce business rates.
Greater town centre parking.	Reduction in business rates to encourage new businesses to come to Aberystwyth.

What three things would you like to see happen to <u>improve Aberystwyth</u> as a place to live, work and visit?	
Help for independent shops.	Refurbish the seafront buildings more often.
Houses for families built.	Regarding finding work - to not be so strict with having to speak welsh
Improve activities on promenade.	Regeneration of Promenade (most important). Pier.
Improve shopping e.g. Debenhams - would improve employment.	Regeneration of town centre.
Improve the seafront further - it is very drab.	Rents and business rates should be reduced to encourage more shops to open.
Improved transport systems.	Roads.
Indoor activities, especially on a Sunday.	Sea front
Infrastructure of transport.	Seagulls.
Invest in bigger shops.	Shopping - needs to be more main chains, we need a Marks and Spencer's.
It needs cleaning up and refurbishing and we need to fill the empty shops.	Shopping improvements
Less empty shops	Shopping. Competition for Morrison's. Aberystwyth looks sadder now than ever.
Less supermarkets	Shops - some things can't be found e.g. gaming - people go on line.
Litter picking on the beach. Students having barbeques and leaving their rubbish.	Shops - variety of shops. Menswear and young people's clothes. Shoes.
Lower business rates	Something For children
Lower costs for businesses.	Something for the youths and visitors - there is nothing here.
Lower parking charges.	Something for young people. There is nothing for children e.g. used to be a bouncy castle etc. on promenade.
Lower rates	Street cleaners.
Lower the business rates in town centre.	Swimming pool that is clean.
M&S	Tesco/IKEA.
Make the harbour area more attractive to visitors.	The disparity between rates of out of town stores unfairly lower than town centres. Unless this is addressed more small businesses will continue to fail.
Market Hall - food market - fresh food.	The regeneration of the seafront.
More activities e.g. festivals to attract more visitors.	The town centre (Great Darkgate Street) should be pedestrianised.
More activities e.g. Ten Pin Bowling.	There should be an "Aberystwyth Eye" on the seafront.
More activities for children and young people.	There should be less officious traffic wardens.
More activities for children e.g. ice skating.	Things for young people and disadvantaged children (teach skills).
More advertising on the TV and everywhere, about coming to Aberystwyth.	Tidier sea front.

What three things would you like to see happen to <u>improve Aberystwyth</u> as a place to live, work and visit?	
More advertising space - so local independent business could use for free.	Total re-think and re-vamp of the promenade.
More boat trips on the seafront.	Town council needs a boot up the behind. The flooding was awful and the recovery was awful too - how they dealt with the flooding.
More commercial seafront.	Trains and buses are bad. Public toilets. Parking is too short and far.
More development on sea front	Transport from country places.
More family orientated places to go and promote it more, especially in summer.	We need more versatile rental accommodation for students and visitors and residents.
More festivals and events	Welsh events and holidays e.g. like the food festivals in Aberaeron.
More independent shops	When doing holes in roads should do it in winter. Painting.

1.4. Barry Visitor Survey

What three things would you like to see happen to improve Barry as a place to live, work and visit?	
Better train link with Bridgend.	More toilets.
Bring back Barry bars (pool at the Knapp).	Needs a proper shopping centre.
Bring back Butlins.	Not enough disabled parking.
Cinema in the area.	Revamp the fair.
Get a cinema.	Swimming Pool
Get more shops.	Temporary parking i.e. 2 hour parking needed more.
Improving the shops on High Street. Reduce number of supermarkets.	The funfair needs doing up.
Make the old Butlins area into a touring caravan and camping site.	The pleasure park needs rejuvenating.
More seating in the shelters for the winter time.	The promenade
More shops opening in the area - more of a choice.	The town centre shops - reduce the rents. Get in Debenhams etc.
More teenage programmes.	Toilets and parking along the promenade.
More temporary and disabled parking.	

1.5. Barry Business Survey

How would you describe trading conditions over the last 2 years?	
Getting better.	Hard. January and February are busiest. General trade now is all or nothing.
Poor	Only recently opened
Ok. Steady.	Much busier Christmas and August because of seasonal stuff like charcoal for barbecues, electric fires for the heat and presents at Christmas.
Not sure	Up and down - depends on the seasons and new fashion.
Steady	Good
Not what it was 3 years ago, not as busy.	Difficult but challenging.
Fairly consistent.	Due to recession people who wouldn't use charity shops now doing so.
A lot quieter than we used to be. Steady trade throughout.	Disastrous.
Tuesday is our busy day along with Saturdays. Steady trade right through.	Steadily going downhill.
Busiest lunchtimes, weekends and school holidays.	Not sure
Not sure	Some good days, some bad days.
Last few months have been poor.	Fine
Steady right through. Sales increase in the summer	Up and down - could be better.
Tuesdays is a better day due to the market. Slightly busier in the summer.	Very quiet just after Christmas up until April.
Very difficult but steady local trade. Busier Christmas time, tend to be quieter in the summer but sometimes affected by summer weddings.	No particular trend from one week to the next.
Generally steady throughout.	Better
Steady right through - but worsening year on year. The road stopped trade - then the regeneration stopped trade - it's never recovered.	School holidays are always quiet.
Quite fair.	The economy has made us to decline.
Very poor and declining.	Busy in the summer, we are quite near the beach and promenade.
Not sure	Nice sunny days improve the footfall through here. Wet days tend to be quiet.
Appalling at the moment.	Quiet now and Christmas. January and February are always really busy.
Comes in peaks - weather permitting.	Lunch times and mornings much busier. Steady throughout the year. Still gain in the summer season, people having picnics etc. at the beach or Porthkerry park.
Bad.	Steady right through, rushes at bank holiday and Christmas.

How would you describe trading conditions over the last 2 years?	
Not sure	Busier after Christmas - good during main holidays.
Nail biting. Never know.	It's quiet when the children are off and good Christmas time. Busy after Christmas.
Not sure	Ok
People can't park - business declining. No publicity.	Sometimes busy, sometimes not.
Diabolical.	Steady
Takings are down since November. Saturdays get busier normally.	Improving all the time.
We get busy in the summer holidays because we cater for school uniforms.	Slowed down a lot.

What elements of Barry should be celebrated / promoted more?	
Town centre, west end of Barry, Barry Island.	High street - need little boutique shops.
Barry Island	The High Street and the Island.
Don't know	Make more of the Island.
Don't know	The High street.
Barry Island. High street shops.	The Island if it is done up.
Barry Island and coastline.	Its heritage. The new improvements, the coastline, Barry Island.
The waterfront.	Don't know
Barry Island.	Porth Kerry, skate park down by the lake.
The seaside.	Nothing comes to mind.
Barry Island	The town centre of Barry and the shopping areas.
I only work here, don't live here. I really don't know.	The High Street and local shopping.
The beach on Barry Island. We do not have a cinema.	Don't know
The island and Porthkerry.	Promote the High Street with all the independent shops.
The beach	Memorial Hall theatre could be utilized more.
Only the beach.	Only thing is the beach.
The beach and Porthkerry.	The unknown beaches near the island.
The Island.	Nothing
Don't know	The island.
The docks.	I can't think of anything.
Barry Island	Ty Hafren as a charity. People do not know we exist and that we are a charity.
High street promoted more.	The High Street.
High Street	The High Street, the beach, Porthkerry and the docks.
High Street	The High Street
High Street.	The beach and promenade.

What elements of Barry should be celebrated / promoted more?	
High Street - heritage town.	Nothing here now to promote.
Barry Island	The High Street.
High Street and the Island.	The square in the town centre - street party, music and theatre events.
The whole of the coastline. Porthkerry beach - the little ones people don't know about - natural beach no sellers of bucket and spades.	The island
The town itself needs promoting.	The island and the country parks.
The seafront	The island - bring it back as a resort.

What three things would you like to see happen to improve Barry as a place to live, work and visit?	
A cinema.	More family orientated facilities (bring the swimming pool back).
A nice, good, seafront restaurant open till 10 pm like Cardiff. Nothing here for us - not a pub but nice relaxing coffee places etc.	More fitness - good gym complex.
Access road to the island needs improving.	More for the children to do, indoors and outdoors.
Another skate board park for the kids up the West End.	More for the kids - cinema.
Barry Island	More for the kids to do - nothing for them.
Barry Island	More leisure and activities for kids.
Barry Island	More leisure facilities.
Barry Island	More little indulgent shops - reduce the rates to attract them in.
Barry Island and coastline.	More local facilities within walking distance of the town centre.
Barry Island.	More parking in the High Street area.
Barry Island. High street shops.	More retail - clothing shops.
Barry leisure centre needs total refurbishment as falling to pieces.	More shopping - variety of shops. All supermarkets at the moment.
Better access to Barry Island - roads and train network - traffic management.	More shops opening in the town centre. Too many charity shops, cafes and card shops.
Better leisure facilities for residents.	More shops to open on High Street, it's getting smaller.
Better parking on High Street and the Island.	More signage for High Street - promote it more.
Better range of shops especially clothes shops - don't want shops to be empty.	More signage to get people onto High Street.
Better range of shops, the larger ones.	More signage.
Better shops bring people in to town so they do not go to Cardiff.	More variety of shops in the town centre to encourage more footfall in town.
Bring back a Butlins or something for people to stay in the town rather than day visitors. They only spend money by the beach, don't help the rest of Barry.	More workplaces for youngsters - variety of different jobs.

What three things would you like to see happen to improve Barry as a place to live, work and visit?	
Bring back the swimming pool.	Need a cinema.
Bring better well know shops in to the area to bring more people in.	Need better parking.
Bring the trade back to the island - better when we had Butlins. We need more caravan parks so people can stay on the island, not just day visitors.	Need more activities for the population.
Build cinemas and restaurants on the waterfront.	Need the parking sorted for the High Street. Better signage to High Street from all access points.
Car park at High Street	New cinema.
Car parking down on waterfront. Development for High Street shoppers would be amazing. Better signage from Barry Island to High Street area. Pump house on waterfront - council to buy it and turn it into a museum.	New cinema.
Car parking for the High Street area.	Nice big family store needed.
Caravan, camping and hotel facilities - not just more and more housing.	Nothing
Cinema	Nothing comes to mind.
Cinema and swimming pool.	Nothing here now to promote.
Cinema here please.	Only the beach.
Cinema needed.	Only thing is the beach.
Cinema needed.	Parking - in the island especially.
Cinema required.	Parking - more of it in High Street, get local car park built.
Cinemas and things to do.	Parking - we need traffic wardens.
Clean up of Barry Island campaign busy days. Too much litter everywhere.	Parking in town centre.
Dog park - the council has an anti-dog attitude - dogs need somewhere to run free.	Parking is a problem and stops people from using the High Street.
Don't know	Parking is terrible in Holton Road, High Street and West End, for shoppers.
Don't know	Parking is terrible, can't even unload the van.
Don't know	Parking needs to be improved in the High Street,
Don't know	Parking to be enforced not threatened. Get leaflet for Barry to promote what is here.
Don't know	Pedestrianise the High Street and get in some nice coffee shops like Costas.
Don't know	Porth Kerry, skate park down by the lake.
Don't know, sorry.	Promote the High Street with all the independent shops.
Don't put supermarkets where small businesses are.	Promote the local independent shops on High Street.

What three things would you like to see happen to improve Barry as a place to live, work and visit?	
Don't think there is anything particular wrong with the area as it is.	Promote tourism/leisure, got no trade without them. Promote the Island. Promote Barry as a nice place to visit.
Expansion down by the docks - it's affecting our trade as is many shops away from here.	Reduce business rates to encourage Primark etc. to come here. Bigger shops = more shoppers.
Facelift for the island.	Reduce rates and rents in Holten Road area to prevent shop closures.
Fill the empty shops.	Reduce the rates here. Get more local flights in the airport,
Focus on heritage railway.	Reduce the rates to encourage new shops to come in.
For tourism - there is nothing about history, the docks etc.	Reinstate a swimming pool.
Free parking for shoppers.	Reinstate the slipway. All public slipways have gone. No public slipway to use by the sea. All the people who used to come in to jet ski etc now go elsewhere. The harbour used to be busy.
Get the traffic wardens back.	Repair the pot holes in the roads.
Give it a more Mediterranean feel; we're a holiday town after all. Where can you go after work except a pub, everywhere else is shut?	Restaurants - get the town centre busy as it gets very quiet, no families walking around.
Good job on Thomson Street but should have done Holton Road - shows how bad it is. Asda will probably close down the shops on High Street so need to prevent this.	Second multi-storey car park.
Grant wanted to re-do my roof etc. - they say there is no money.	Signage to High Street from the waterfront - leaflets etc.
Greater range of shops coming in to the centre.	Sort out the parking here especially, nowhere really for passing trade to stop.
Hanging baskets.	Stop building flats and houses.
Have a museum to display the history of Barry - lots of history in area.	Stop the supermarkets coming to town. They are destroying local businesses.
High Street	Street cleaners back - less litter.
High Street	Swimming pool.
High Street - heritage town.	The beach
High street - need little boutique shops.	The beach and Porthkerry.
High Street and the Island.	The beach and promenade.
High Street parking - more of it.	The beach on Barry Island. We do not have a cinema.
High street promoted more.	The docks.
High Street.	The High Street
Holton Road - clean it up.	The High Street and local shopping.
I can't think of anything.	The High Street and the Island.
I have a taxi rank outside my shop which does not help.	The High Street, the beach, Porthkerry and the docks.

What three things would you like to see happen to improve Barry as a place to live, work and visit?	
I only work here, don't live here. I really don't know.	The High street.
Improve access to Barry Island, better roads.	The High Street.
Improve Barry Island and the High Street in Barry. Fairer business rates.	The High Street.
Improve the coastal route. Encourage people to walk/cycle/ramble from Cardiff to Barry.	The island
Improve the main town shopping areas, either a chair or independent shop but not charity shops or gold shops.	The island - bring it back as a resort.
Improve the parking in the town centre. Need to encourage people to come in to town.	The island and Porthkerry.
Improvement in the shopping facilities, High Street and Holton Rd.	The island and the country parks.
Improvements on the island to bring more tourists.	The Island if it is done up.
Improvements to public transport.	The Island.
Its heritage. The new improvements, the coastline, Barry Island.	The island.
Keep the improvements in the town centre and dialogue and communication with the town council management.	The rubbish for the bins pile up - collection is only every two weeks and the seagulls attack the bags and make more mess.
Less alcohol drinking on the streets.	The seafront
Less massive supermarkets - we have a Tesco in Barry already.	The seaside.
Fewer supermarkets.	The square in the town centre - street party, music and theatre events.
Look at the mess around here - lovely areas just going to waste - try and do something with it.	The theme park on Barry Island needs renovating and maybe a SeaWorld.
Low rates to encourage more shops in the town centre.	The town centre needs lower rates to attract more quality shops.
Make Barry a more desirable place to attract new shops - maybe reduce rates.	The town centre of Barry and the shopping areas.
Make Barry Island a bigger tourist attraction. Make the funfair undercover for all year round.	The town itself needs promoting.
Make more of the Island.	The unknown beaches near the island.
Memorial Hall theatre could be utilized more.	The waterfront.
Money spent on shop frontages attracts trade.	The whole of the coastline. Porthkerry beach - the little ones people don't know about - natural beach no sellers of bucket and spades.
More activities for the children - leisure stuff.	They could extend the town a lot.
More activities for the younger generation - places to go.	Things for the children to do both indoor and outdoor.
More amenities.	Tidier environment.

What three things would you like to see happen to improve Barry as a place to live, work and visit?	
More car parking areas so people can shop around the different parts of Barry.	Town centre area needs a focus - bring it together. It's very disjointed through the town, from one end to the other.
More carriages and improvements to the trains.	Town centre regeneration is required.
More chain shops in the centre and here.	Town centre, west end of Barry, Barry Island.
More council promotion and involvement for the High Street - too much red tape.	Traditional brown signs showing traditional High Street shopping from both directions and from the island.
More council run promotions for High Street e.g. market day - block off street.	Ty Hafren as a charity. People do not know we exist and that we are a charity.
More development for High Street - a car park, small multi storey and open air.	Variety of shops - too many charity shops.
More entertainment - things to do - not clubs but Alton Towers etc. to have a day out.	Variety of shops in the town centre.
More entertainment and leisure facilities.	We need a bank in High Street.
More entertainment and leisure facilities.	We need a cinema and swimming pool.
More entertainment for youngsters.	We need a cinema.
More entertainment.	We need fewer supermarkets, they are killing us.
More facilities for kids, cinema and bowling alley etc.	We need more car parking spaces in the High Street and nearby.
More facilities for young people, youth clubs etc. and extend the leisure centre.	We need the island to have a cinema.
More family orientated attractions.	We need to reduce the business rates to attract more small independent shops.

1.6. Mon a Menai Visitor and Residents Survey

What three things would you like to see happen to improve Mon a Menai as a place to live, work and visit?	
The access roads to here (the bends). There should be a top road and a one way system.	Small steamer from Menai Bridge going up to Llandudno and Liverpool. Been done in the past so can reinforce it.
Grass cutting and just smartening up the town.	Swimming pool/paddling pool needs attention - it's an eyesore.
Housing for the local youngsters who've gone to local schools and can't get on the property ladder.	That's it
More activities for the younger people - entertainment - middle of the road stuff.	The parking could be improved.
More little markets.	There is nothing I want to see changed here.
More seats on the seafront.	Use the square opposite castle, more use for outdoor markets.
Open air theatre in castle gardens.	

1.7. Mon a Menai Business Survey

How would you describe trading conditions over the last 2 years?	
Its good in the summer, not in winter, but it balances out so will stay.	Can't answer.
The pier and seafront has brought people to town.	Hard to say. Not busy when the ships are in. Passengers taken to Beaumaris etc by coach and on to Bettws y Coed - no benefit for us financially.
Only been open a month	Trading has been steady and it has been booted in the summer months with holidaymakers buying fishing gear.
Good last year but depends on weather this year.	Good days when ships come in but otherwise quiet.
Weather dependent. Jubilee weekend we had a big wheel and this brought a lot of people to town and we were busy.	Deteriorating.
Very good, improving.	Slightly better in the summer months but no real pattern to the trade.
Got quieter	Middle - not too bad, not too good! Better than others. Depends on cruise ships.
Awful.	Trading ok since opened.
Poor	Been very good.
Fairly busy during summertime and dies the death in wintertime.	Too quiet. Not busy enough.
Don't know.	Not sure
Very up and down.	The weather recently has had a detrimental effect. We are busier in the summer. The cruise ships are great for us. The Sundays are good for us.
Poor in the winter. Good in the summer due to the tourists.	Note sure
Pretty steady all year due to coach trips. Good and bad days. Busier in the summer time.	Busy weekends - busier in the summer.
It's been alright. We are an exception to the rule as what we sell is unique.	Saturdays are dreadful. Summers used to be busy; maybe the weather is affecting us this year.
Slightly better in the summer but a steady trade.	Depends - some days up and down. Steady trade.
Difficult to tell. This year the weather has been par. Last year things did improve, maybe the royal wedding and the couple living on the island helped a lot.	Varies each day. Trade is steady though we do not have a particular pattern. Out of town supermarkets not helping.
Challenging - people are not spending. A set of glasses cost £300. We are trying to promote cheaper specs - we have to compete with Specsavers etc.	Improved as moved location to town centre in the last 2 years.
Quiet	Steady
It slacks off in the winter.	Doing well.
Steady. Busier in the summer months.	Got worse and worse
Camping is non-existent this year. Camping is weather dependent. Caravan side is full - excellent.	Depends on time of year.

How would you describe trading conditions over the last 2 years?	
Quite established business. Stayed steady over the last 2 years. A lot of regular locals use our shop - been here 25 years.	Going gradually downhill.
Due to lack of volunteers we are struggling a bit.	Getting worse
Busy in the summer.	Busier in the summer, though not this summer due to the weather and recession.
Winter has been difficult but other seasons have been great.	Steady. Good in holiday times.
Very poor so far this year with the weather as we are close to the beach, our visitor numbers, especially at weekends, are down.	Busier in the summer but steady with xmas etc. Quiet months are January and February.
Only been here 3 months. Trial period to see if we can get the trade back on its feet. The previous owners failed so the business must have worsened over the last 2 years so we are trying again now, as we own the laundrette next door.	Open all year round - busier in the summer.
not sure	Last year improved but this year worsened.
Visitor numbers have not increased but contract cleaning has.	Good. Quiet in winter months but trade good.
Local trade helps throughout the year so not solely reliant on tourists. Tend to aim business at locals.	We've started opening longer hours and for 10 months of the year. Good regular customers here but we rely on tourists in the summer months.
Up and down. No particular pattern from week to week.	

What elements should be celebrated / promoted more?	
The castle and jail but that is promoted. The beach.	The beaches.
Quite a lot of advertising done now for all aspects - hotels, castle, Menai Straits.	There is nothing to attract the people into the town.
The castle. All the community events need to be more supported and promoted.	The beaches and fishing.
More of it as a resort instead of day trips to see castle and jail.	Celebrate/promote the market - used to be big but now small and with a big market Holyhead used to be busy, better for business.
No idea	We need to get people in to the town centre.
The history.	We have got great history and heritage no one seems to mention.
The castle. Historic town.	All of it - promote Holyhead all year round not just the week that the Americans come in the summer.
Its history and uniqueness of being a little town.	No idea
Eating facilities. Second to none here.	More fun events in Holyhead. More attractions. The bridge that links - shopping centre into town brings more trade into town centre.

What elements should be celebrated / promoted more?	
Should keep its historical side. Keep it as it is but keep it well maintained.	Need the shops to be open then we can promote the town centre.
I have no idea.	Beach
Promote the beauty of what we have got. Promote the historical side more.	History and culture of the area.
The castle, needs more posters etc., it's our heritage.	Maritime history and the heritage.
General promotion of the town. Keep the public toilets open - they are threatening to close them.	Lovely scenery in the area.
Its independent businesses doing such a good job in keeping the town going.	The roman fort.
The main attractions are already advertised.	Quarry Park - has a lake, ducks etc. We should do more to promote this area.
The old swimming baths should be utilised.	More wildlife and nature should be advertised.
Businesses small - everything is adequately promoted.	The coastline/beaches.
The heritage. The individuality of all the shops. Lots of independent small shops that you can't find on the High Street.	The scenery. Local talents e.g. businesses - skills of trade people.
The beach front. The walks along the coast.	Can't think of anything.
It's stunningly beautiful, maybe more advertising on this fact. Unfortunately not advertised.	The main street should be promoted in town centre.
The beach. All for improving the promenade.	No
The beach is the only asset we have.	Promote the roman walls/history of Holyhead.
The beach.	Its history
The seaside, the beach and the front.	We have the beach and windsurfing.
The carnival	Water sports and beaches.
The only thing we have is the beach so we should promote it.	Water sports, beaches and views.
Don't know. Lots of caravan sites - they need things to do. The coastal walk and the beach.	Beaches
Beach - nice and quiet - promote it as that. Beautiful Benllech.	No
Fill up the empty shops - less vacant.	The beaches and shops.
Promote the beach more, it's pretty, so use it as much as you can.	Wind surfing.
RSPB bird sanctuary needs promoting and also the old historic fort. Heritage is important.	

What three things would you like to see happen to improve Mon a Menai as a place to live, work and visit?	
A roundabout on the main junction by the Texas garage.	More indoor activities for wet weather days.
Another attraction to replace Sea Zoo.	More indoor facilities for families and kids.
Another supermarket.	More indoor facilities like the leisure centre. Nothing for the holiday makers to do if it's raining.
Bakery	More investment in town centre to keep the shops open.
Beach and facilities - kayaking - bring these activities here.	More job creation and schemes - especially for graduates.
Beach safety needs looking at, lifeguards etc.	More jobs for local people and higher wages.
Better access from the Menai Bridge, it's a bottle neck in the summer.	More long stay parking.
Better bus service here, not regular enough.	More of the big shops coming into town to bring new people in.
Better internet access. The fibre optic network only pops up on the dual carriageway.	More of the bigger chain stores/supermarkets e.g. Tesco Express, Primark, in the town itself and not just out of town. We need more variety not just charity and café shops.
Better parking - poor in the village.	More opportunities for young people in the area. Only work is retail.
Better parking.	More parking at weekends and holiday time even if open a seasonal parking area in a field.
Better paving.	More parking in town - get more people in.
Better toilet and washing facilities - beach people can wash themselves before getting in their cars.	More policing - druggies and alcoholics off the streets.
Better transport links - buses.	More practical shops. Improve the leisure centre with youth facilities.
Better transport links through Anglesey.	More recreation
Better variety of shops - mix of large and independent.	More shops - smaller independent.
Bring a museum to Beaumaris	More shops in the town centre. We need the big ones so that they will attract more shoppers.
Bring more jobs to the town by opening up the empty shops.	More shops in the town.
Bring shop and business rates down to pen the empty shops. Fill the empty shops.	More shops in town centre - fill the empty ones up.
Build a promenade to Gallows point and open the marina.	More shops to be encouraged especially the little independents by reducing the rates.
Business rates need to be slashed.	More signage for the side street businesses.
Businesses encouraged to the centre of town - small independents please.	More support for community events.
Can't think of another one.	More variety in terms of shopping.
Can't think of any more.	More visitors.

What three things would you like to see happen to improve Mon a Menai as a place to live, work and visit?	
Can't think of any more.	Need a major chain name to draw people into the centre of town.
Can't think.	No
Can't think.	On road parking
Cash machine requested in the village.	Parking - remove the restrictions on the road. We don't mind pay and display but we need more parking spaces.
Cash point	Parking - cheaper.
Cheaper transport.	Parking - free parking, as only in out of town at the moment.
Chinese or Mediterranean restaurant.	Parking - more facilities and free parking.
Do up the town hall and the market.	Parking - more free parking to encourage people to stop here instead of the retail parks.
Empty shops - fill them up.	Parking - more free parking. The green is too expensive
Encourage youngsters to be entrepreneurs.	Parking - not enough.
Entertainment for adults as well, like ten pin bowling alley etc.	Parking - used to be able to park on both sides of the road. There are not enough spaces in the summer for the number of holiday makers arriving.
Family activities.	Parking - we need long term stay nearer the centre.
Fill up the empty shops.	Parking during the summer is a nightmare. People drive in and out as there is no parking.
Filling up the empty shops.	Parking for locals - impossible for me to park for work.
Fish and chip shops should be banned from using polystyrene.	Parking is awful now - needs attention.
Free car parking.	Parking should be altered - especially for locals.
Free parking not pay and display.	Parking.
Get more activities for younger children, nothing here for them.	Pedestrianising the promenade or a one way will be a complete disaster.
Get rid of the pedestrianised areas and allow the cars access.	Persuade more businesses, the little independent, to come into the main High Street.
Get the bus re running from Holyhead to South Stack lighthouse and attractions around Holyhead.	Place for children and teenagers to go.
Get the park better - more rides and activities for local people.	Playground for whole family to visit. Make tennis courts free and open for longer.
Have a scheme for young people - more activities for youngsters.	Promote the history - lots of roman ruins.
Help with the road network - gets congested in the summer.	Promotion of start-up rent available.
HSBC has closed, need cash point.	Put money into the town, not the marina or the harbour.
If all proposed work goes ahead it will bring more jobs into town.	Reduce High Street business rates.

What three things would you like to see happen to improve Mon a Menai as a place to live, work and visit?	
If you live here you can pay a lump sum and park on the green. If you're a visitor it's difficult to park - need to sort the parking out.	Reduce the shop rates.
Improve coastal path from Moelfre to Benllech.	Refurbish public toilets.
Improve public toilets.	Refurbish the empty run down shops - it looks a mess.
Indoor activities when the weather is bad.	Re-open the swimming pool.
Indoor swimming pool.	Shower facilities for the surfers etc.
Keep free car parking.	Smarten. Get rid of the empty shops - More lively.
Keep the leisure centre open.	Something for people to do.
Late night shopping.	Something to bring the visitors into town and for teenagers and families. Evening entertainment for 12-18 year olds e.g. music, that'll help get them off the streets.
Leisure centre.	Somewhere to take the kids when it's wet.
Less charity shops.	Stop Pedestrianisation from 11 am to 4 pm of town centre, bad for business. It stops passing trade and they tend to go to supermarkets.
Less excursions from the port - buses take ship people away from Holyhead before they've come in to Holyhead itself.	Streets back to non-pedestrianised.
Less housing - new build	Swimming pool.
Less pontoon.	Tennis courts - open more in village.
Longer opening times for shops.	The big stores like M&S to attract people.
Main village car park is free now - they want to start charging - that would be really bad for us.	The ice cream parlour has queues outside. Vehicles mount the pavement - someone is going to get hurt. Have bollards or railings etc.
Make all shops to their clear up.	Out of town shops good but more bigger shops.
Make parking cheaper and more places.	The pubs closing earlier.
Marine conservation line - get rid of it as no one will be able to access the beach. It will kill Beaumaris.	The roads
More activities for families. We don't have much of a beach - need more children's entertainment. Nothing to do in bad weather.	The seafront needs parking to unload their surfing equipment etc.
More access to the beach - to drive down to it for dropping off the boats etc.	The town council concentrates on the main High Street, not the shops away from there.
More accommodation.	The youth club needs promoting more. Kids are hanging around doing nothing.
More activities in town centre after 11am when pedestrianised like treasure hunts / fun days and vintage car displays.	Things to do - more leisure activities.
More activities in winter to help keep businesses open. Younger people activities not OAP day trips to castle.	Too many charity and food shops in the main centre. Bring bigger chain stores to the centre.

What three things would you like to see happen to improve Mon a Menai as a place to live, work and visit?	
More advertising for the town itself to put us on the map.	Tourist attractions - we have roman history. We need an indoor roman museum.
More attractions for locals - not much here to do.	Tourist information centre in the town itself.
More awareness of things going on like a festival day.	Tourist information centre.
More bus links.	Tours for visitors to get to the areas of interest.
More entertainment - outdoor activities.	Town centre tidy up /shops filled.
More entertainment for kids e.g. ten pin bowling.	Try and get a major company/retailer into town to get more people into town centre.
More facilities for children, both indoors and out.	Try to get more attractions for out of season.
More facilities for fewer than 24s down to 11 such as leisure centres and outdoor centres and ice rink.	Visitor centre in the town itself
More funding for small businesses/industrial units to help the community.	We need a book shop and more variety of shops. Less charity shops please. More shops should open on Sunday.
More greener i.e. trees.	We need better parking here.
More indoor activities for children.	We need more shops - no sportswear etc. we have to travel to Bangor... More choice of shops for holidaymakers.

1.8. Rhyl and Colwyn Bay Street Interviews

What elements of Rhyl and Colwyn Bay should be celebrated / promoted more?	
Beach huts along the promenade towards Rhos on Sea (put sand on the beach at Rhos on Sea, not the ash).	Low grade housing needs to be improved.
Better mixture of shopping - small independent and large shops.	Make the seafront more appealing.
Better shopping facilities.	More activities like the Air show.
Better shopping.	More benches along the promenade towards Rhos on Sea.
Better signs to the beach from town.	More facilities for disabled people.
Bring back the funfair / donkey rides.	More guest houses and hotels for holiday makers.
Change the mixture of the community - the druggies and alcoholics need moving out.	More planting on the grass verges opposite the pier.
Clean streets.	More public toilets (gardens) along the promenade.
Clean up the streets and pain promenade area buildings - they look drab.	More seating on promenade, left side of pier, Rhos side.
Do up the pier.	More shops encouraged to town centre, independent shops, and boutiques.
Do up the pier.	More shops for sailing / windsurfing etc.

What elements of Rhyl and Colwyn Bay should be celebrated / promoted more?	
Do up the pier.	More things for teenagers like adventure playground and youth club.
Dog mess along the promenade - like dogs toilet. Needs cleaning up dogs mess/bins.	More variety of shops - major stores. Too many charity shops.
Dog waste baskets along the promenade.	Not thought about it.
Don't develop the existing promenade - I like it as it is.	Paint seawalls on promenade brighter colours especially towards the West End.
Don't know but they're trying their best.	Pier could be demolished at far end.
Encourage more shops in the town centre.	Pier improvement.
Free sport facilities.	Promote places to stay here e.g. B&B and do promotions.
Get alcoholics and druggies off the streets.	Redecorate the promenade railings towards Rhos. Sort out the cycle path, needs repairing.
Get rid of druggies on streets e.g. sleeping in shelters on the promenade.	Revamp the main beach road.
Get rid of the druggies and alcoholics.	Shops for kids clothes.
Get rid of the druggies, shut down B&Bs for DSS.	Shops just a sign of the times as more close.
Get shops done up.	Should revamp the fair area and by Blue Bridge West End - know they are trying to.
Get the pier done up.	Smoking outside pubs a real eyesore especially by bus stop.
Improve and enforce the dog fouling on the promenade - no good just having the signs.	Take the stones off the beach, better for families.
Improve cleanliness and appearance of town centre.	The pier improved.
Improve the carnival and promote it.	The pier is an eyesore and needs sorting out.
Improve the railings along promenade - rotting in places and needs painting.	The promenade cycle track towards Rhos is a mess.
Influx of independents on drugs and alcohol issues bring the town down.	Tidy up the promenade - cycle track and railings changed for similar concrete ones, like by water sports centre.
Knocking the pier down - eyesore.	Want to be able to walk along beach under pier but it's blocked off as the pier is dangerous so can't walk all the way.
Fewer alcoholics on street.	We need much better shops in town.
Less charity shops in town.	

1.9. Rhyl and Colwyn Bay Business Survey

How would you describe trading conditions over the last 2 years?	
Lack of people coming in and we are competing with under the counter cheap tobacco.	We make appointments through advertising and internet. The footfall is quite low here; we rely on our appointments for trade.
Only started trading this month.	Quieter in the summer. People going on holiday etc. They do not use computers on the beach but we are steadily going downhill.
Just gone diabolical.	It's worsened over the last year. Up and down - and people come in from further afield than just Colwyn Bay.
Not very good.	We supply schools and businesses etc. The shops side has worsened.
Don't know	Difficult to answer. We are busy on the internet but the high street footfall is a trickle - down 50% or so.
Traffic wardens. Yellow lines outside shop not helped with trading.	Don't know what's going to be a busy day. It varies from day to day - not affected by holiday makers.
Don't know	We do better on a Saturday - mainly local people not holiday makers.
No custom apart from the regulars.	Not many holidaymakers in Colwyn Bay any more, a few day trippers.
Only open 1 year - trade seems to be reducing. Who would have thought it with the holiday season coming?	Can't really tell. Saturdays used to be busy but not anymore.
Not enough people passing or coming in. Started off good but it's going down since.	Only been here since February
The worse May ever since started trading.	Lack of holiday makers is affecting us.
Trade declines. Not so many people.	Don't know
Trade summer months only. Overheads are high and financial take are low.	Picking up on the front but all other music shops in Llandudno, Rhyl etc have closed down.
Lack of people coming down here because of the parking. Half built eyesore across the road. So far, all the millions pumped in, it has not made the slightest difference to our trading. We are quiet all year round now.	Have got progressively worse.
Quieter in winter.	Stable
Busier in the summer. Varies from day to day.	Very competitive. Internet not helped and the market - selling similar products and pay very cheap rent for the day.
Mainly busy in the summer because of holidaymakers.	Don't know
The whole market place needs improving to make it more inviting for customers. Our trade is steady right through - no peaks.	Quiet
Very difficult. Too much competition from large department stores - with free parking on industrial estates etc.	Appalling

How would you describe trading conditions over the last 2 years?	
I am busy. Shoe repair in the winter and key cutting in the summer.	Gone quiet.
Appalling. Less and less trade.	Getting better but not doing as well as what we thought we would.
Not bad	Only have two good days trading on market days, Tuesdays and Saturdays.
Don't know.	Up and down. Not so many drop in customers. Not so many customers in the summer, was busier before in summer.
Recession has hit us but summertime ok.	Quiet, not as many people coming into shop.
It's dropped but maybe due to recession.	Don't know
Just going down slowly, less customers every month.	Less amount of customers and they spend less.
It's been steady, same as a year ago but hopefully will improve this summer if the weather improves, with tourist numbers.	No footfall. Increase in antisocial behavior.
Don't know	Ticking over alright. Internet going good for company.
I think it's been ok but the boss might say different. We get busier late summer, a lot in September (back to school stuff). If the market is busy, we get busy.	Don't know
How can I answer the question?	Deteriorating badly by 50%.
Winter time is very poor. Holiday makers help.	Quiet in the afternoons. Mornings and evenings busier. Mainly local trade.
Quite good for us.	More customers in the summer, steady all year.
Hard	Thursday to Saturday is the busy time. September onwards for Halloween and New Year is always busy so our trade is quite stable.
Less people.	Been declining year by year for the last 4 years. People who come to Colwyn Bay stay in caravans. Because of the price of fuel the regular caravaners come only once or twice a year.
Moved from another shop to here and still bad. This area needs cleaning up as might help trade.	Summers and Christmas are the busiest because of Christmas cakes and wedding cakes.

What elements should be celebrated / promoted more?	
Lovely beach to promote - sandy.	Don't know
The seaside. Promenade.	The beach area. Park by the Rheidol school.
Do the beach and harbour up. Best thing they could do.	We have a lot of good specialist independent retailers. People come from 40/50 miles or so.
More courses at the college which is good.	Very hard. 50 years ago Colwyn Bay was the premiere resort. Couldn't really say.
Don't know	Can't think of anything.
How can you promote town if nothing here? Can't see sea because of high walls. Sun centre in disrepair.	Fantastic bay - promote water sports and promenade. More guest accommodation.
Beach	Can't think of anything.
Can't think of anything.	No, I can't think of anything, maybe the promenade and the sea views.
Can't think of anything besides the beach.	The pier.
The seafront.	The pier if done up.
No there's nothing. Beach maybe if weather is good.	No
Beach and promenade - get it like Llandudno.	Theatre. Eirias Park. The seafront.
The model railway.	Don't know
Gateway to Snowdonia, using Rhyl as a stop off point. More outdoor shops like the Lake District.	Can't think of anything.
Promote the beach front more.	No
Seafront	All of it. The beach front area, try to get people to go there then they might actually come up into town and help the business.
They have built the children's village and ruined the sea view - so nothing to promote.	The theatre and the arts. Nurture an evening culture in town i.e. restaurants / theatre, bring the town alive after 5pm.
I think the beach side and more access to it.	All of it, to get people into the town.
I don't think we have anything like a landmark or caves or anything, only got the beach.	Station road area of town. Pleased with big shops there but smaller shops need help and advertisement.
Seafront	The market - advertise it and it will get better. More like how it used to be - more traders will bring more people into town.
Don't know	The beach definitely. Pier would be the big thing. Should be a nice little seaside resort with nice shops.
None	The promenade.
Don't know	The exit routes!
Don't know	No ideas
The college. The hub - help get people back into work.	The theatre.

What elements should be celebrated / promoted more?	
None	The shops need to be promoted even if its advertisements.
That we are near Snowdonia. A great base to stay or should be one day.	Nothing
Do a lot more with the seafront.	Don't know
Nothing big enough to promote. Maybe the promenade or the beach.	The heritage - in history it was one of the top destinations to come to.
Sea and beach after all we are a seaside town.	Nothing I can think of.
The promenade.	Develop the pier.
The beach. Marine Lake.	There is nothing to be promoted. The beach has a nice stretch so could do more to promote that.
The beach and the promenade.	Eirias Parc

What three things would you like to see happen to improve Rhyl and Colwyn Bay as a place to live, work and visit?	
A lot needs re-looking at.	Keep the shops opened, losing shops makes shopping rubbish.
Activities for younger/teenage children, only thing to do is go to the pub.	Keep the streets clean.
Attract more people to the town	Large shops e.g. M&S.
Attract more visitors by adverts etc.	Less crack heads.
Better car parking and cheaper.	Links between promenade and beach.
Better housing.	Local rates for leisure centre. Too expensive to spend whole day at Sun Centre.
Better leisure facilities - more sporting events.	Look at the business rates.
Better parking and reduced parking.	Lower business rates to encourage businesses to start
Better range of shops.	Make financially the outdoor market equal to the shops.
Better shopping centre.	Make help for small businesses.
Better shops, more variety and bigger shops.	More activities and things to do in the evening after about 7ish, there's nothing open. That would bring more people in and benefit pubs and food businesses.
Better shops.	More activities for families.
Better variety of shops.	More advertisement to tell people what we've got especially in the summer holidays.
Bring more industry into the area, for jobs, people and for spending.	Bigger name shops - maybe a retail park.
Broadband is crucial to business. Speed is way too slow.	More children's activities.
Can't think of another one.	More entertainment - cinemas.

What three things would you like to see happen to improve Rhyl and Colwyn Bay as a place to live, work and visit?	
Cash input to the shops - re support adverts, anything to help the businesses - IT support.	More facilities for evening / nightlife.
Cheap rates for businesses.	More for kids to do apart from the beach.
Cheaper business rates please.	More for the kids and teenagers.
Cheaper business rates.	More for the kids to do.
Clean up the High Street.	More free parking to bring people into town.
Clean up markets & streets. Keep buildings maintained	More indoor activities on wet days.
Clean up the streets and the shop fronts.	More modernization.
Clean up the streets.	More parking.
Clean up the streets. Make people more responsible for their pets.	More parking.
Cleaner, friendlier environment. No drunks walking street in day.	More police on the beat in Colwyn Bay.
Committed community development officers.	More shops advertised in the centre.
Completely revamp the town.	More shops.
Consider parking costs more.	More things for families.
Could do with better shops here -better rates for the shops to keep them here.	More things for the kids to do.
Council to help with the rates for the empty shops.	More variety of shops.
Develop the pier.	Need more shops.
Do something with the arena - concerts etc. Put a canvas over it - use for all ages.	New shopping mall - attracting a diversity of shops.
Don't know what to do.	Night club.
Don't know.	Nothing else I can think of.
Empty shops look very untidy.	Organized beach events like beach volley ball etc.
Empty shops need filling but not with charity shops.	Parking
Facilities to attract more people in.	Parking - free parking bays.
Fill up all the empty shops.	Parking - free parking so can compete with supermarkets.
Free parking after 3 pm to encourage people to use the High Street shops etc.	Parking - not enough and not enough short term / free parking.
Free parking at cinema/leisure areas.	Parking - not enough of it and traffic wardens don't help.
Free parking spaces.	Parking - nowhere to park in town - all loading bays.
Free parking, else we will not have anybody coming here.	Parking - people always complain about it.
Free parking.	Parking - severe problem.
Get rid of the flats and the people that have moved in there (there is a sign outside Liverpool prison that says start a new life in sunny Rhyl!	Parking - shoot the traffic wardens. Hardly any car parks and they are too expensive.

What three things would you like to see happen to improve Rhyl and Colwyn Bay as a place to live, work and visit?	
General clean up - it looks scruffy.	Parking and entering Colwyn Bay from Junction 21 does not look appealing.
General tidy of the town. Stop bringing in alcoholics and druggies from other places.	Parking could be improved.
Get a tourist information board in town - always asked and have to send them to Rhos on Sea.	Parking is a nightmare.
Get all empty shops filled, reduce business rates.	Parking is the big issue. The signage and information is nonexistent - no one knows of the short stay / long stay etc.
Get all people off streets and back to work.	Parking. Lack of free spaces in the centre.
Get an IT learning centre - might get people into town - people would walk to that part of town i.e. up by Shell garage.	Parking. Station road was a parking place for many years. We need more street parking.
Get Man City FC back to do more activities.	Promote the rest of town not just precinct and Eirias park.
Get more businesses in.	Promote the small businesses.
Get rid of all the dossers and druggies of society who the council have moved in.	Public toilets
Get rid of all the drunks off the streets.	Put the fun fair back.
Get rid of beggars and drunks off street. Too scared to walk street, especially at night.	Quality shops. Major brands needed.
Get rid of dossers/scroungers/drunks/druggies out of town.	Redesign the A55 to stop being a bypass - new signage.
Get rid of many grabbing councilors.	Redevelop the housing to the rear of the seafront.
Get rid of problem people who have been moved in to the area.	Reduce parking charges particularly Tuesdays and Saturdays which are market days.
Get rid of the bird mess. Needs to be pressure washed every day from town centre.	Reduce rents and rates to fill the empty shops. More children's activities please.
Get rid of the druggies.	Regeneration of the pier.
Get rid of the drugs.	Regeneration, not just on bottom half of town, don't forget the top half.
Get rid of the drunks - don't seem to be much doing to stop people walking around the streets with their can of drinks.	Remove the pigeons and seagulls. The roads and pavements need cleaning up.
Get rid of the drunks and druggies.	Shopping centre needs to be open and trading. Keep shops open.
Get rid of the drunks.	Shops need to be improved. Fill up the empty ones.
Get rid of the DSS that have moved into the area.	Should make all car parks free - would improve shopping.
Get rid of the empty shops.	Some centre rates reduced for local residents.
Get rid of the people that have been brought in to the area i.e. drunks and druggies.	Something for families on wet days.
Get the empty shops filled up.	Somewhere for families to go on wet weather days - under cover activities.

What three things would you like to see happen to improve Rhyl and Colwyn Bay as a place to live, work and visit?	
Get the markets all on one street.	Sort out the parking - long stay places
Give a face lift to the city centre shops or give them free rates so that they can afford to do them up.	Sort out the parking for everybody. I cannot even park outside my own house.
Help for local independent businesses. Cull the seagulls - mess everywhere.	Sort out the parking.
Help in providing accommodation for tourism.	Spend money on town centre to clean it up.
Help small businesses more.	Stop letting all the alcoholics and drug users move in. People don't come to Rhyl now, they go to Prestatyn.
House improvements and remove the type of people who have recently been encouraged into the area.	Stop promoting the front and station road and promote the smaller shops.
I am happy with it as it is.	Stop the social housing for drug addicts.
I can't think of anything else.	Stop wasting money.
Ice rink needed and cinema. Roller rink was well attended in the past but all gone now.	Streets need cleaning and buildings improved.
Improve and clean the train station.	The fair should have stayed and re-instated.
Improve the drains; they stink both winter and summer.	The ice skating rink we had the other Christmas brought people into the town.
Improve the parking - free parking.	The marked outdoors needs better stalls.
Improve the parking - has no benefits to shoppers or visitors.	The people, loads of drunks - get rid of them.
Improve the promenade.	The pier - it's an embarrassment.
Improve the shopping areas - range and look of shops.	The weather, if improved, would benefit.
Improve the social issues - people in the area.	Tidy up the existing buildings and fill the empty shops.
Improvement in shopping and eating – just kebab shops.	Tidy up the infrastructure of the shops especially the empty ones.
Improvements on the front - skate park is nice but bit of an eyesore.	Tidy up the main street and fill the empty shops
Improving the parking.	Traffic wardens need more common sense and more leeway.
Investment into promoting town with signage and advertising.	Value for money attractions.
Just tidying up the buildings.	What about an ice skating rink - would pull people in from a wide area.
Keep side streets clean.	

1.10. Swansea Street Interviews

What elements of Swansea should be celebrated / promoted more?	
Access to Gower.	More hotels and accommodation.
Affordable housing.	More improvements to council properties.
Ashamed of High Street.	More indoor activities for visitors.
Attractions to get people in to town centre.	More investment in the town centre.
Better shops.	More investment.
Bring more shops back to centre.	More jobs.
Bring more work in to the town.	More leisure facilities for children.
Café on beach.	More leisure facilities in the Mumbles.
Castle gardens are an eyesore.	More shops e.g. shoe shops.
City centre needs major overhaul.	More shops in the centre.
Clean beaches.	More shops in the centre.
Clean Swansea up.	More shops.
Clean the buses. The seats are very dirty.	More street entertainment at weekends.
Clean the city better.	More strict law enforcement.
Clean the city centre.	More things for youngsters.
Clean up the streets.	More tourist attractions needed.
Don't know.	More with the seafront, more attractions.
Don't know.	More work for people with no work.
Don't know.	More work needed in the area.
Electrification of trains in Swansea. Get rid of one way system.	Need more places to eat outside - extend quadrant.
Entertainment for children - skate parks.	Need to attract young people.
Facilities (caravan) in Gower, improved.	Need to put the bridge back - other side of county hall - it was called the slip (Swansea Bridge).
Facilities on beach e.g. toilet and shower.	Needs brightening up e.g. The Mumbles.
Fill empty shops.	No big department stores.
Find more employment for people.	No greenery in the town.
Further development in the shopping areas.	Not much need for improvement.
High Street done up - it's disgusting.	Not too commercialized.
Improve castle gardens - it's become a concrete mess.	Oystermouth Hotel needs renovating - !
Improve castle gardens.	Put a park near the castle.
Improve links between Marina and City centre - need a bridge that is central to Tesco's car park.	Put the railway back
Improve Mumbles - nothing there for children - now needs swimming pool.	Retail improved drastically - people go to Cardiff or shop online.
Improve roadworks - too many, causing major hold ups.	Re-vamp the city centre.

What elements of Swansea should be celebrated / promoted more?	
Improve shopping area. We need better shops - men's clothing shops.	Sell Swansea more as a rural town not a city.
Improve the council housing.	Shopping area.
Improve the High Street.	Shopping is terrible. Spend money on town centre. Can't compete with Cardiff and Carmarthen.
Improve the railway - electrify it.	Shops filled. Cardiff is brilliant. Swansea is forgotten. Llanelli has improved.
Improve the roads on the outskirts of Swansea.	Slip bridge put back.
Just needs tidying up - litter, dog mess, and chewing gum.	St David's Centre needs improving.
Kings way - traffic system is awful.	Stop the drinking on the streets.
Like it as it is.	Tense atmosphere on Saturday night because of police.
Make more of town's history. Boat trips and Copperopolis need advertising more.	There is no greenery - nowhere to sit in the city centre to have a sandwich.
More activities.	Too many drug users.
More advertising of events.	Town centre refurbished, get bigger shops.
More attractions - like a Sea Aquarium.	Transport on Sunday evenings.
More attractions on beach.	Transport running later at night.
More child friendly restaurants.	Turn the Kingsway back to two way traffic.
More educational schemes. Historical for example copper works and Dylan Thomas.	

1.11. Swansea Business Interviews

How would you describe trading conditions over the last 2 years?	
Getting slightly better. Is a winter pub, improving year by year.	Challenging because of competition in Swansea and economic climate.
Credit crunch does not affect us.	Poor due to lack of footfall - this has decreased over last two years.
Hit and miss. Took a hit after economic crisis, but depends what is going on in city, for example graduation.	A struggle because of the economy and of footfall. Lots of businesses have closed.
Not been here for long. 12.3% growth year on year.	Worsened because of lack of footfall. We reckon it decreases by at least 15% each year.
Average	Difficult due to the economic climate.
Industry has experienced losses.	We are doing ok at the moment.
Student based	Opened up two more in South Wales, taken over the wake.
Quiet, but more to do with location	Dropped, maybe because of economic climate.
Noticed that people come out later, and we do more food in the days.	Not sure.

How would you describe trading conditions over the last 2 years?	
Quite bad - everywhere is going down. Customers not spending as much money.	Not good due to the economic climate.
Hit and miss - seasonal, depends on students.	Rubbish
Been trading 17 -18 months.	Take more money daily.
Because of refurbishment of building.	Weather.
It varies, don't know why, hit and miss.	Lot of Chinese students come here.
Doing better	We're up.
Ok better on weekends.	Gone quiet - depends on weather.
Not too bad.	15% improvement.
Dreadful	Tough because of competition.
Harder	Since the bus station has opened trading has got worse.
Terrible.	Same
Built business up and progressing.	We have regular customers but less with us now.
Trading conditions worse over the last 5 years. The bendy bus development of the road system had a very bad effect on the business and it has not really recovered.	Bad.
Up and down. Difficult largely due to recession.	Inconsistent
Not brilliant - could be a lot better. Lack of footfall.	We've halved our trade.
We have not been open very long but so far business is getting better all the time.	Down two years ago but up this year.
Tough due to the recession.	Steady but not helped by the state of the city centre.
Sporadic and very bad at the moment - mixture of the economy and city centre not as pleasant as it could be.	Quite difficult - lack of footfall due to economic climate.
Very hard because business rates are so high. Too many cafes in the area.	Slight improvement but difficult.
Extremely difficult because of the state of the city. Kingsway should go back to 2 way traffic. Cheaper city centre parking needed. High street needs regenerating very badly.	It's a bit up and down. Not consistent like it used to be 2 years ago.
Very difficult due to economic climate. Lack of footfall and competition from other cafes.	It's only the last 3 months due to weather. Massive student population here.
Challenging but we give good customer service which means a lot of return custom.	We work on targets. Tend to find if the weather is bad, trade drops off. Oxford street needs to be covered more.
The economic climate has affected us more this year. Lack of footfall in Swansea.	Scary, we don't have footfall coming in to Swansea, they all go to Llanelli because of parking - too expensive and can't find their way to the car parks.

What elements should be celebrated / promoted more?	
Gower and seafront	The seafront, the mumbles, the Gower.
Seafront	The shopping centre.
Doing alright as it is.	The seafront, Mumbles and the Gower.
Seafront	The French market in Swansea (2/3 times a year).
Not answered	Gower, Mumbles and the seafront.
Nice beaches, Mumbles but pubs are closing down there.	The beach
Mumbles	Gower Mumbles.
Part of town by the castle / fountains	Marina, beaches.
Beach.	Not sure.
Mumbles	Mumbles
Wind street - police vans are coming up and down, should be stationary and policemen walking, intimidating.	What have we got to celebrate? The Mumbles train was the jewel of Swansea Whenever people suggest things people don't listen. The Gower and Mumbles is the best thing.
Centre and Gower	Marina.
Walks (Gower - jewel of the crown of Swansea).	Leisure, beach, windsurfing, boat trips, open spaces, canal, people only know about Gower.
The arts	Beaches
Need more things for people to do.	Do more in Mumbles, but everything closed down.
The beaches.	Mumbles and Gower.
Promote more young people to open a business.	Town centre, Bay.
The versatility. There are lots of people trying to do interesting things but none get any help!	The Mumbles
City by the sea.	What is there to promote?
Shopping	Enough advertising of the Gower. The shopping experience should be advertised more - a select few shops always seem to get advertised.
The Gower - it's forgotten!	The Taliesin, smaller businesses like that and the Uplands.
The waterfront museum & LC2.	They can't do enough for the seafront and Gower.
The shopping centre. The mumbles and the Gower.	The transport links and proximity of the centre to things.
The cultural background of Swansea.	The beaches and coast.
High street should be advertised more.	The Gower.
The beaches.	Gower
The beaches.	The beaches and the Gower.
The Leisure Centre	The city centre - we need more footfall here.
The Gower, the Marina, the castle.	The Beaches.
The beaches and waterfront	The marina - link it with iconic buildings - the Grape and Olive and try to publicize the beach.
The cosy feel of Swansea as opposed to a large city. The friendlier aspect of Swansea.	Its scenery, beaches, its proximity to the Mumbles - close to Swansea.

What elements should be celebrated / promoted more?

Swansea Bay	Beaches, The Gower, advertise what's going on more when things happen.
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What three things would you like to see happen to improve Swansea as a place to live, work and visit?

A better road system leading into the city centre.	Make more of seafront.
A lot more council housing development.	Making town centre more family friendly.
Another department store.	More businesses.
Attract small businesses from Cardiff to open up.	More cafes in the marina so it's more like Cardiff Bay.
Beach and promenade.	More chain stores.
Better city centre parking to get visitors in.	More decent shops in the centre.
Better city centre.	More development on front.
Better facilities in marina (like in town).	More done for small businesses.
Better prospects for tourism.	More employment.
Better public transport - more frequent and cheaper.	More events.
Better public transport.	More forward planning for events.
Better quality of shops.	More green spaces in and around centre.
Better road link from Gower to city centre. Bus fares far too high.	More happening in castle gardens.
Better road system.	More in the way of entertainment in the city centre.
Better shopping - more variety.	More independent shops
Better shopping in the centre.	More initiatives for individual and multiple stores.
Better shopping.	More job centre and benefits office away from High Street.
Better signage.	More jobs for students.
Better, more reasonable parking.	More leisure activities needed.
Better/cheaper public transport.	More parking - cheaper parking.
Bridge with footprints to lead people from town to marina and beach.	More parking spaces.
Bring things back to town centre.	More people.
Buildings around the station - they are all derelict.	More police on streets.
Car parking too expensive and have to pay for an all-day ticket because there is no hour option.	More promotions of the city as a pleasure for example, the Gower.
Change the road system, make Kingsway 2 way again. Increase capacity of parking in the city centre.	More public toilets in the centre.
Cheaper parking in the centre.	More public walkways.
Cheaper parking.	More reasonably priced parking.
Cheaper things to do.	More refurbishment of the city centre.
City centre needs improvement.	More shopping options, improve high street.

What three things would you like to see happen to improve Swansea as a place to live, work and visit?	
Clean the city centre - gum etc.	More shops - independents and bigger better chain stores - not pound shops.
Clean town centre - scruffy/dirty. High street is awful drugs and crime.	More shops (better in Cardiff).
Clean up High Street.	More shops and up to date fashion. Cardiff is more modern and up to date. Swansea is living in the 90s.
Clean up the High Street of addicts, alcoholics and the homeless.	More shops to increase job opportunities.
Cleaner beaches - needles washed up on the beach and general rubbish.	More shops, independent and chains.
Cleaning up drugs on high street.	More shops.
Concentrate more on local unique businesses.	More shops. Make it more relaxed like Llandudno e.g. can have a drink outside. Cleaning. Public toilets in centre of Aberystwyth.
Could support more businesses and get them to stay in town instead of outlets.	More things like The Wave by McDonalds.
Council should encourage young people to open new businesses.	More things to do that do not involve alcohol.
Don't know	Move the TIC either to the castle or the Dragon Hotel area.
Don't know	Need free parking - better parking - more of it.
Don't know	Need more choice of shops.
Don't know	Need more shops - bigger corporations like Sony, Apple.
Don't know.	Need to link the marina with the Bay and the beach - incorporate them all - sell them all.
Enhance the shops in the shopping centre and the environment round them.	Not answered
Fill the empty shops.	Parking is a nightmare especially for people working in the city centre.
Fill the empty shops.	Parking is terrible.
Fill the empty shops.	Party in the Park, youngsters lost out. Raft race.
Fill the shops.	Put the road back the way it was.
Free or more reasonable parking in the city centre.	Put the slip bridge back on the slipway.
Funding grants for small businesses because City Centre is dead.	Quadrant needs a facelift.
Get rid of beggars off street.	Regenerate High Street - it is the gateway to Swansea City Centre.
Get rid of the drunks and the druggies.	Regenerate the High Street.
Get rid of the one way system.	Relief on business rates - city centre get it for the BID but we have been left out on the marina.
Get the road system right. Make Kingsway a dual carriageway again.	Re-open the Kingsway to 2 way traffic.

What three things would you like to see happen to improve Swansea as a place to live, work and visit?	
Help businesses by reducing the business rates.	Rid High Street of the undesirables.
Help with business rates.	Road system needs to be changed.
High street needs improving.	Something that is not as expensive as LC2.
Hold more events e.g. in stadium.	Sort out roads.
I want them to employ people in the council who know what they are doing.	Sort out the homeless problem and drug users and alcoholics.
Ice skating, roller skating arena.	Stop building houses around Mumbles area for the traffic.
Improve parking in and around the centre.	Stop building shopping centres outside the city centre. Reduce business rates to attract more businesses.
Improve parking in the centre and reasonably priced.	Stop knocking beautiful houses down.
Improve the business rates - they are too high.	Stronger police presence to make it safer.
Improve the High street.	Student orientated.
Improve the town centre - refurbish shops and display boards.	The road system changed.
Invest money in shops.	There should be a link between the marina and the city. Maybe a shuttle bus.
Job creation in leisure industries as well as retail.	Too many clothes shops and can't get specialty hobbies/games.
Keep it tidy.	Tour bus rather than a flexi bus.
Knock down the High Street or sort it out - improve.	Town centre and shopping centre needs vast improvements.
Lack of independent and chain shops.	Traffic is a problem.
Less empty shops.	Traffic needs a huge improvement.
Local businesses need credit they deserve.	Transport - cannot get around in a car. Improving security of cycle racks - like the ones in the leisure centre.
Look at tackling social issues in town centre, for example people selling drugs on street outside shop.	Transport improvements.
Lower the business rates and fill the empty shops.	Transport is in need. Access to station is scary.
Make it more unique, smaller businesses.	

Annex 3: Socio-economic Analysis

1.12. Population Trends

1.12.1. Population Change 2008-2010

Town	RA/Authority Area	2008 2010	Rank
Wales	N/A	0.5	
New Quay	Ceredigion	-5.0	1
Abersoch	Gwynedd	-3.0	2
Saundersfoot	Pembrokeshire	-3.0	3
Rosneigr	Môn a Menai	-2.7	4
Fishguard	Pembrokeshire	-2.5	5
Barmouth	Gwynedd	-2.3	6
Tenby	Pembrokeshire	-2.1	7
Porthmadog	Gwynedd	-1.6	8
Colwyn Bay	North Wales Coast	-0.9	9
Benllech	Môn a Menai	-0.9	10
Holyhead	Môn a Menai	-0.9	11
Rhyl	North Wales Coast	-0.8	12
Beaumaris	Môn a Menai	-0.7	13
Porthcawl	Bridgend	-0.5	14
Criccieth	Gwynedd	-0.4	15
Pwlheli	Gwynedd	-0.3	16
Prestatyn	North Wales Coast	-0.1	17
Aberaeron	Ceredigion	0.5	18
Tywyn	Gwynedd	0.6	19
Barry	Barry	1.2	20
Swansea	Swansea	1.5	21
Aberystwyth	Aberystwyth	2.9	22

Source: Mid-Year Population Estimates 2008 & 2010 (Ward Level Experimental Statistics), Office of National Statistics

1.12.2. Working Age Population

Area	RA/Authority Area	2008	2010	Change
Wales	N/A	64.8	64.4	-0.3
Swansea	Swansea	66.7	67.1	0.4
Barry	Barry	64.6	64.9	0.2
Aberystwyth	Aberystwyth	77.5	78.1	0.5
Holyhead	Môn a Menai	63.7	64.0	0.2
Beaumaris	Môn a Menai	56.2	56.3	0.2
Benllech	Môn a Menai	56.4	55.1	-1.3
Rosneigr	Môn a Menai	54.8	55.6	0.8
Colwyn Bay	North Wales Coast	61.9	61.4	-0.5
Rhyl	North Wales Coast	61.7	61.1	-0.6
Prestatyn	North Wales Coast	58.8	58.3	-0.6
Aberaeron	Ceredigion	54.4	54.7	0.3
Barmouth	Gwynedd	63.0	62.0	-1.0
Abersoch	Gwynedd	57.3	56.3	-1.0
Criccieth	Gwynedd	56.3	55.9	-0.4
Porthmadog	Gwynedd	58.6	57.6	-1.0
Pwllheli	Gwynedd	62.4	62.2	-0.1
Tywyn	Gwynedd	55.4	54.6	-0.7
Porthcawl	Bridgend	59.3	58.0	-1.3
New Quay	Ceredigion	59.6	58.7	-0.9
Fishguard	Pembrokeshire	55.9	55.5	-0.4
Saundersfoot	Pembrokeshire	58.8	56.0	-2.7
Tenby	Pembrokeshire	61.8	62.4	0.6

Source: Mid-Year Population Estimates 2008 & 2010 (Ward Level Experimental Statistics), Office of National Statistics

1.13. Employment Trends

1.13.1. Change in Employment Numbers 2008-2010

Town	RA/Authority Area	Employment 2008	Employment 2010	% Change	Ranking
Wales	N/A	1,299,551	1,259,043	-3.1	
Criccieth	Gwynedd	578	470	-18.7	1
Tywyn	Gwynedd	1,058	890	-15.9	2
Prestatyn	North Wales Coast	4,091	3,504	-14.3	3
Aberystwyth	Aberystwyth	10,016	8,746	-12.7	4
Fishguard	Pembrokeshire	1,286	1,138	-11.5	5
Saundersfoot	Pembrokeshire	802	715	-10.8	6
Holyhead	Môn a Menai	2,475	2,212	-10.6	7
Tenby	Pembrokeshire	2,625	2,370	-9.7	8
Rhyl	North Wales Coast	9,031	8,230	-8.9	9
Colwyn Bay	North Wales Coast	8,173	7,663	-6.2	10
New Quay	Ceredigion	449	430	-4.2	11
Rosneigr	Môn a Menai	136	132	-2.9	12
Abersoch	Gwynedd	424	416	-1.9	13
Porthcawl	Bridgend	3,576	3,512	-1.8	14
Barmouth	Gwynedd	718	712	-0.8	15
Barry	Barry	14,513	14,520	0.0	16
Swansea	Swansea	68,850	69,900	1.5	17
Beaumaris	Môn a Menai	667	713	6.9	18
Benllech	Môn a Menai	529	572	8.1	19
Porthmadog	Gwynedd	1,984	2,194	10.6	20
Pwllheli	Gwynedd	2,186	2,545	16.4	21
Aberaeron	Ceredigion	1,309	1,585	21.1	22

Source: Business Register and Employment Survey (2008 and 2010)

1.13.2. Ratio of full time to part time employees (a ratio of greater than 1 = more full time than part time employees)

Town	Authority Area/RA	Ratio 2008	Ratio 2010	Change	Rank 2010 part time reliance	Rank change 2008 2010
Wales	n/a	1.93	1.8	-6.7		
Rosneigr	Môn a Menai	0.78	0.39	-50.2	1	1
Abersoch	Gwynedd	1.02	0.57	-44.6	2	2
Benllech	Môn a Menai	1.44	0.89	-38.0	4	3
Tywyn	Gwynedd	1.72	1.34	-22.4	16	4
Swansea	Swansea	1.63	1.37	-16.4	19	5
Aberystwyth	Aberystwyth	1.37	1.15	-16.2	11	6
Barmouth	Gwynedd	1.02	0.87	-14.7	3	7
Holyhead	Môn a Menai	2.28	2.02	-11.5	22	8
Criccieth	Gwynedd	1.21	1.08	-10.3	10	9
Porthmadog	Gwynedd	1.38	1.24	-10.3	14	10
Prestatyn	North Wales Coast	1.50	1.35	-10.2	17	11
Colwyn Bay	North Wales Coast	1.31	1.19	-9.0	12	12
Barry	Barry	2.03	1.91	-6.2	21	13
Fishguard	Pembrokeshire	0.97	0.92	-5.6	5	14
Porthcawl	Bridgend	0.97	0.98	1.5	7	15
Pwlheli	Gwynedd	1.68	1.76	4.8	20	16
Beaumaris	Môn a Menai	0.90	0.95	5.8	6	17
Rhyl	North Wales Coast	1.28	1.36	6.6	18	18
Tenby	Pembrokeshire	0.92	0.99	8.0	8	19
Saundersfoot	Pembrokeshire	1.04	1.20	15.8	13	20
New Quay	Ceredigion	0.93	1.07	16.0	9	21
Aberaeron	Ceredigion	0.99	1.25	26.0	15	22

Source: Business Register and Employment Survey 2008 and 2010

1.14. Out of Work/Benefit Claimants

1.14.1. Trends in out of work benefit claimants

Town	RA/Authority Area	% of working age pop 2008	% of working age pop 2011	2008 2011	Ranking Change
Wales	N/A	14.8	15.5	4.3	
Abersoc	Gwynedd	5.2	8.1	11.8	1
Fishguard	Pembrokeshire	15.0	17.3	11.0	2
Colwyn Bay	North Wales Coast	16.5	18.5	10.3	3
Holyhead	Môn a Menai	23.9	26.6	9.8	4
Prestatyn	North Wales Coast	14.2	15.3	8.5	5
Benllech	Môn a Menai	15.9	16.9	7.9	6
Barry	Barry	18.0	19.1	7.0	7
Rhosneigr	Môn a Menai	14.1	15.5	6.7	8
Porthcawl	Bridgend	14.8	15.9	6.2	9
Rhyl	North Wales Coast	24.9	26.8	5.5	10
Pwlheli	Gwynedd	13.4	13.9	4.3	11
Swansea	Swansea	20.0	20.3	4.2	12
Beaumaris	Môn a Menai	11.8	12.1	2.0	13
Tenby	Pembrokeshire	11.5	11.8	0.7	14
Sayndersfoot	Pembrokeshire	8.2	8.6	-3.8	15
Aberystwyth	Aberystwyth	8.4	7.8	-4.0	16
Porthmadog	Gwynedd	9.3	9.1	-4.7	17
Tywyn	Gwynedd	12.7	11.4	-10.1	18
Aberaeron	Ceredigion	12.4	12.6	-23.1	19
Barmouth	Gwynedd	13.8	14.4	-25.3	20
New Quay	Ceredigion	12.9	12.6	-31.4	21
Criccieth	Gwynedd	8.5	7.3	-37.7	22

Source: DWP benefit claimants - working age clients for small areas – average annual rates 2008 and 20011

1.14.2. Trends in JSA Claimants

	Claimant 2008	Claimant rate 2011	% Change in Rate	Rank of Rate increase	% Change in number	Rank of No. Increase
Wales	2.4	3.9	62.8		64.1	
Fishguard	1.8	3.9	114.1	1	108.4	2
Saundersfoot	1.1	2.2	106.3	2	90.5	4
New Quay	1.2	2.4	102.9	3	85.6	5
Pwllheli	1.7	3.5	101.9	4	103.6	3
Porthcawl	1.9	3.5	85.8	5	79.2	7
Tenby	1.2	2.2	79.5	6	82.1	6
Holyhead	6.2	10.8	76.2	7	72.3	8
Prestatyn	2.1	3.4	61.8	8	62.6	10
Barry	3.7	5.9	61.4	9	64.9	9
Swansea	3.0	4.7	58.2	10	60.1	11
Rosneigr	3.2	5.1	58.1	11	51.9	12
Porthmadog	1.7	2.5	52.0	12	49.0	13
Colwyn Bay	3.5	4.9	41.1	13	36.8	16
Barmouth	3.0	4.2	40.7	14	34.3	18
Aberaeron	1.3	1.8	39.7	15	39.5	14
Rhyl	5.3	7.3	39.2	16	36.7	17
Aberystwyth	1.5	2.0	31.0	17	37.8	15
Beaumaris	2.8	3.7	30.9	18	29.8	19
Benllech	2.0	2.5	26.9	19	16.9	20
Tywyn	1.8	2.1	15.2	20	14.5	21
Abersoch	1.2	1.3	8.0	21	128.0	1
Criccieth	1.4	1.5	7.4	22	7.4	22

Source: JSA Claimant Count Average Annual Rates – 2008 and 2011

1.15. Reliance upon tourism

1.15.1. Employees - Accommodation and Food Services % of All Sectors

Area	RA	Rate 2008	Rate 2010	% change in No.	Rank of Sector reliance	Rank of Sector performance
Wales	N/A	7.2	7.3	-2.4		
Rhosneigr	Môn a Menai	18.1	39.7	128.6	3	1
Beaumaris	Môn a Menai	26.7	31.7	20.6	6	2
Benllech	Môn a Menai	22.7	25.5	11.7	9	3
Abersoch	Gwynedd	44.9	49.6	5.4	2	4
Porthcawl	Bridgend	27.8	28.9	1.0	7	5
Barry	Barry	6.7	7.5	1.0	16	6
Swansea	Swansea	5.7	5.6	-1.2	19	7
Aberystwyth	Aberystwyth	9.3	12.8	-1.7	12	8
Porthmadog	Gwynedd	29.8	21.4	-2.3	11	9
Prestatyn	North Wales Coast	13.2	11.5	-4.3	15	10
Aberaeron	Ceredigion	16.3	12.5	-6.0	13	11
Saundersfoot	Pembrokeshire	36.1	39.0	-7.7	4	12
Colwyn Bay	North Wales Coast	5.0	5.8	-10.3	18	13
Pwllheli	Gwynedd	6.7	5.5	-10.4	21	14
Barmouth	Gwynedd	25.0	21.6	-14.3	10	15
Tenby	Pembrokeshire	33.2	34.2	-17.0	5	16
Criccieth	Gwynedd	25.6	27.3	-17.2	8	17
Rhyl	North Wales Coast	6.5	5.5	-17.9	20	18
New Quay	Ceredigion	61.3	52.3	-18.6	1	19
Fishguard	Pembrokeshire	15.0	12.4	-22.2	14	20
Holyhead	Môn a Menai	7.1	5.2	-22.2	22	21
Tywyn	Gwynedd	7.0	6.3	-23.5	17	22

Source: Business Register and Employment Survey 2008 and 2010

1.15.2. Employees: Arts, entertainment, recreation & other services % of All Sectors

Area	RA	Rate 2008	Rate 2010	% change in No.	Rank sector reliance	Rank sector performance
Wales	N/A	4.0	4.3	2.7		
Porthmadog	Gwynedd	5.1	7.5	65.5	4	1
Pwllheli	Gwynedd	3.4	3.7	37.3	19	2
Abersoch	Gwynedd	5.3	6.7	20.0	7	3
Colwyn Bay	North Wales Coast	5.7	6.6	16.9	8	4
Aberaeron	Ceredigion	2.8	2.5	11.8	22	5
Aberystwyth	Aberystwyth	5.9	6.5	11.2	9	6
Barmouth	Gwynedd	2.9	3.3	10.5	20	7
Barry	Barry	3.5	4.2	4.7	15	8
Beaumaris	Môn a Menai	4.0	4.1	4.0	17	9
Swansea	Swansea	5.0	5.3	2.8	13	10
Rhyl	North Wales Coast	6.3	7.1	-0.9	6	11
Porthcawl	Bridgend	8.5	9.6	-1.5	2	12
Prestatyn	North Wales Coast	15.3	16.4	-7.6	1	13
Criccieth	Gwynedd	4.6	5.4	-8.3	11	14
Benllech	Môn a Menai	9.6	8.6	-9.3	3	15
Rhosneigr	Môn a Menai	8.6	7.4	-10.0	5	16
Tywyn	Gwynedd	4.1	4.0	-17.5	18	17
Holyhead	Môn a Menai	4.8	3.1	-20.8	21	18
Tenby	Pembrokeshire	5.8	5.7	-22.3	10	19
Fishguard	Pembrokeshire	6.1	5.4	-25.0	12	20
Saundersfoot	Pembrokeshire	5.3	4.2	-31.6	16	21
New Quay	Ceredigion	7.0	4.8	-34.5	14	22

Source: Business Register and Employment Survey 2008 and 2010

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research evaluation surveys

Tel / Ffôn: 01545 571 711

Email / Epost: wavehill@wavehill.com

Website / Y We: www.wavehill.com

Wavehill Ltd, 8 Water Street / 8 Heol y Dŵr, Aberaeron, Ceredigion, SA46 0DG



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An Evaluation of Current Practice in Relation to Seaside Town Regeneration

Executive Summary

A report by Wavehill Ltd and Planning Solutions Consulting Ltd for the Welsh Government

October 2012

Executive Summary

In June 2012 Wavehill Ltd in partnership with Planning Solutions Consulting, were appointed by the Regeneration Division of the Welsh Government to evaluate the local impact of regeneration activities in seaside towns within the designated Regeneration Areas (RA). The report has focused on providing clear, evidence-based findings to:

- Determine the effectiveness of the impact of the investment in seaside towns;
- Consider the extent to which the strategic, partnership approach employed in the Regeneration Areas adds value to seaside town regeneration
- Suggest priorities that could be embedded within future regeneration policy for seaside towns.

The coast of Wales has played a unique role in the history, heritage and culture of the country. Today, 60% of the population live and work in the coastal zone and 70% of the Welsh coastline is recognised for its environmental importance and beauty. Whilst the RA programme does not have a specific focus on seaside towns, five of the seven RAs were considered to encompass conurbations that could be considered seaside towns, although there are differences in the scale and scope of seaside town's regeneration activities within these areas¹.

The approach in the **North Wales Coast** RA, centred on Rhyl and Colwyn Bay, has focused on an integrated programme of economic, environmental and social interventions to bring about sustainable change and having to cope with "post-mass tourism legacy. The **Mon a Menai** programme includes a strong coastal emphasis, but the programme is more a response to the general economic downturn and the transition to a low carbon economy. **Swansea** is slightly different again, where the focus is on addressing key social and economic issues and capitalising on opportunities that exist with regional 'capital' (and subsequent city-region) status. The RA investment in **Aberystwyth** is focused on maximising its key settlement status as well as addressing local deprivation issues, specifically unemployment and economic inactivity and poor housing quality. **Barry** still retains the characteristics of a seaside town, particularly on the island, however the programme remit has been broad ranging with a distinct focus on the community alongside a desire to target the three key areas of Barry Island, the waterfront and the town centre.

The review has involved consultation with key stakeholders in the five RAs, a review of existing monitoring data, socio-economic analysis of the comparative performance of the identified seaside towns against thirteen other seaside towns identified in Wales and primary research with businesses, residents and visitors in the seaside towns within the RAs.

The review has been undertaken whilst the programme is still in operation; indeed, three out of the five RAs have only been 'operational' since 2010/11. This has made an analysis of impact arising from the investment difficult with the outcomes of RA investment only beginning to be realised.

The socio-economic analysis provides little evidence of the RA areas out-performing the comparator seaside towns² although Aberystwyth has, against some measures, out-performed comparator areas. More generally, the seaside towns within North Wales have suffered over the 2008-2010 period to a greater extent than elsewhere and this is particularly the case in Holyhead.

¹ The "seaside towns" within RAs were identified as: Aberystwyth, Barry, Beaumaris, Benllech, Colwyn Bay, Holyhead, Prestatyn, Rhosneigr, Rhyl, Swansea

² Comparator seaside towns were identified from: Seaside Towns in Wales: A benchmarking study, CRESR Sheffield Hallam University November 2009

Investment has funded a relatively large portfolio of projects, consisting of multiple components, across the spectrum of regeneration activity. It is important to recognise that in some instances the investment has catalysed regeneration by becoming the 'dealmaker' enabling projects to be brought forward more quickly. Whilst quantifiable impact is difficult to identify, there are a number of good examples of successful resort regeneration activities. Visitors and businesses were quick to identify public realm, promenade and town centre improvements and their role in uplifting the quality of experience within the towns.

In terms of outputs and results arising from RA investment, the crude value for money assessment suggests poor value for money. However, the breadth of potential outputs and outcomes that RA investment can target, undermines the accuracy of value for money assessments based on cost per output alone. The estimated rate of private sector funding "induced" in the RAs is also considered to be a poor return and whilst it can be partly attributed to a weak economy and market failure, is also likely to have been influenced by the lack of an intervention rate for the programme. It is also apparent from our review of monitoring information that the capture of outputs and outcomes is not comprehensive which severely impacts upon the accuracy of (and serves to under-value) a value for money assessment.

A more positive picture however is evident from the primary research undertaken with visitors with almost 60% of visitors to the seaside towns stating the towns had improved in recent years. However, feedback from businesses was mixed, but this should be considered in the context of the current economic climate and the poor seasonal weather in 2012.

Our research found that investment has galvanised commitment and momentum at a strategic level and also amongst delivery partners and communities. Certainly at the outset of designation, there appeared to be more of a "can do" attitude in a number of RAs, with clearer ideas of direction and many pipeline projects emerging. RA Board and Delivery partnerships have (rightly) been given the lead to refine and develop their action and implementation plans for delivery. The level of flexibility brings with it innovation and there are some very effective practices being adopted.

There have been a number of 'process' deficiencies, which make the task of assessing performance and impact difficult, particularly the lack of consistent baseline data and the lack of systems and procedures for collecting and managing output data.

At a local level, there are a number of examples of good practice at a process and project level. The review of best practice suggests that securing successful coastal regeneration requires a number of key building blocks / themes, including:

- local leadership and ownership;
- alignment of private and public sector policies and agendas;
- clarity on outcomes – where partners have divergent views of the big picture, the prospects of success are severely compromised;
- maximising the impact of private and public sector investment in specific places;
- engagement and involvement of local people;
- an understanding that physical development on its own will not revive communities;
- a long timescale – regeneration does not happen overnight.

Whilst investment has been a significant step in the right direction, long term problems remain in coastal communities. A clear priority is the need to grow the economy in a sustainable way; the focus needs to be on economic growth in coastal communities (jobs and employment), which leads to prosperity and provides the means to tackle poverty and disadvantage. Regeneration addresses market failure in economic terms and builds confidence in communities to invest in their economy.

The untapped opportunities of individual locations need to be realised; their distinctive assets, their past heritage, new cultures and proximity to other regional assets. Long term transformational change requires a balance between need and opportunity, with a smaller number of strategic priorities.

Where market failure in seaside towns exists, the towns need to diversify away from their traditional narrow “bucket and spade tourism” focus, reflecting the needs of visitors whilst at the same time not losing sight of the USP of being located along the coast.

There is general consensus emerging through our research that there needs to be greater strategic alignment across WG departments (education, business and skills) to better address the needs of coastal communities. On some indicators, Welsh seaside towns emerge as more disadvantaged than Wales as a whole, including employment rate; working-age benefit claimant rate; seasonal unemployment; earnings and housing lacking key amenities. However, one key feature is the diversity between *individual* seaside towns. Many seaside towns are performing well; whereas others (notably Rhyl and Holyhead) continue to experience severe levels of multiple deprivation. The challenges and problems facing seaside towns are complex and will take time to address but the scale of need and opportunity does provide a case for a strategic response to coastal regeneration in Wales.

The report makes a number of recommendations.

1. Consider broadening the terminology (and therefore focus) from “seaside town” to “coastal town/coastal community”.
2. Review and up-date the *Seaside Towns in Wales: A benchmarking study* and develop a robust coastal baseline to provide an information base on coastal towns and communities in Wales.
3. Develop a more sophisticated management information system to capture outputs, outcomes and impacts arising from investment.
4. Consider increasing the Coastal Communities Fund ‘pot’ for Wales to drive forward economic development and job creation in coastal areas.
5. Provide targeted resources to back major investment plans that have a ‘catalytic’ effect to stimulate the growth in areas of greatest need.
6. Provide greater incentives to encourage funding leverage particularly from the private sector.
7. Improve the sharing of lessons between public agencies, stakeholders and other partners exploring ways to support coastal communities, particularly cross-RA programme learning and wider dissemination.
8. Put in place formal mechanisms in the WG to increase strategic co-ordination, alignment and partnership working.
9. Encourage and support investment into developing a dynamic visitor offer associated with “place-making” based on local assets and distinctiveness.
10. The strategic partnerships established as part of RA designation need to continue to provide strategic direction, influence and drive delivery. A greater sense of ownership over project activity may provide the impetus required.

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research evaluation surveys

Tel / Ffôn: 01545 571 711

Email / Epost: wavehill@wavehill.com

Website / Y We: www.wavehill.com

Wavehill Ltd, 8 Water Street / 8 Heol y Dŵr, Aberaeron, Ceredigion, SA46 0DG

New Regeneration Framework

