

Carmarthen Town Centre

Recovery Masterplan

Prepared for
Carmarthenshire County
Council

October 2021



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1 Purpose & Context

This recovery masterplan has been commissioned for Carmarthen town centre by Carmarthenshire County Council (Carmarthenshire CC) in response to the effects of the COVID-19 pandemic. The masterplan reviews existing regeneration activity and provides a fresh focus on the priorities and the strategy for recovery and future growth.

At the current time, the long term effects of the COVID-19 crisis are highly uncertain which makes it difficult to draw a clear picture of the future. As we manage and adjust to the pandemic moving forward, there is the need to rethink the shape and purpose of the town centre and how to positively respond to longer term changes.

This recovery masterplan has been prepared with the contributions of local businesses and stakeholders to help steer the immediate actions in support of town centre recovery and to provide the framework to help re-imagine longer term regeneration and growth. Furthermore, at a time when Carmarthenshire as a whole is suffering from the effects of the pandemic, the recovery masterplan aligns with the priorities and actions that will support the Carmarthenshire wide economic recovery¹.

¹ Carmarthenshire Economic Recovery and Delivery Plan, Carmarthenshire Council 2021

Carmarthen town centre profile

- A multi-functional and historic town centre which serves an important regional role for a wide rural catchment in West Wales anchored by non-essential retail, leisure and hospitality, employment and administrative function as the county town.
- The centre supports a blended mix of national retailer representation and independents spread across a relatively large shopping area with two shopping centres; Merlin's Walk and St Catherine's Walk.
- Primarily a comparison (non food) led centre with key retail anchors including Debenhams (closing) and Marks & Spencer together with a commercial leisure offer (Vue cinema) and national food & drink operators focused at St Catherine's Walk.
- There are a number of entertainment, arts, culture and theatre attractors in the centre which contribute to the destination appeal.
- An historic and distinctive central area focused around Nott Square, Guildhall Square and the castle together with traditional independent business areas of King Street and Lamma Street which are complemented by more modern shopping centres.
- An established indoor market together with outdoor market (held twice weekly).
- A town centre which benefits from visits and expenditure from tourists and workers alongside traditional shoppers in the catchment area, characterised by a relatively wealthy shopper profile and local levels of prosperity.
- Focus for ongoing transformation with mature partnerships in place and guided by the priorities of the town centre masterplan, the town regeneration forum and its sub groups, Carmarthen BID and committed County Council and European funded projects.

2 The Impact of COVID-19

The impacts of COVID-19 are huge, unprecedented and continue to cloud the economic outlook. The effects on the town centre have been driven by several inter-related shocks including forced closures, social distancing, accelerated online shopping and structural changes for national multiple retailers.

Whilst impacts have been largely negative, some positive changes have also arisen including strengthened community networks, support for local businesses and 'shop local'. It has also supported growth in business innovation, diversification and created new business opportunities.

The Economic Impact Assessment of COVID-19 on Carmarthen town centre² identified the immediate and some potentially longer term impacts that shape this masterplan.

² Carmarthen Town Centre – Economic Impact Assessment of COVID-19, December 2020, Owen Davies Consulting Ltd



- £1.3M – the estimated amount of weekly spending on non-essential retail, services, leisure and hospitality that has been lost during periods of lockdown. These hard hit sectors are all well represented in Carmarthen town centre.
- Over 80% decline in footfall at its lowest level (April 2020) compared to a year earlier. Even during the summer 'unlock', weekly footfall over August 2020 remained circa 55-60% of the previous year. Compared to the other primary towns in the county, the town centre has suffered a major drop in footfall **reflecting its role as a regional destination with a wide catchment area**, appeal to tourists and town centre workers, which have all been impacted by lockdown and travel restrictions.
- **17% vacancy rate reflecting the impacts of store closures** especially amongst the national multiples some of which represent large units. Further closures are anticipated in 2021.
- Impacts on the wider Carmarthen economy have been modelled and show reduced productivity, loss of employment with accommodation and food services businesses expected to **experience significant closures**. Prosperity measured in terms of average household income is lower than average.

Future drivers of change

Post COVID-19 life will likely be different to what many were used to with the pandemic accelerating many pre-existing structural trends as well as people forming new habits. This means people are unlikely to return entirely to the old behaviours. However, there remains uncertainty with how permanent these changes will prove once COVID-19 is no longer a threat and people can return to normal work patterns and socialising. The future drivers of change (Figure 1) are likely to have both positives and negatives effects for businesses and the people that use the town centre.

	Negatives	Positives
National multiple retailers	Loss of footfall as brands that once provided an important customer draw continue to restructure/close	Prime frontage become available for ambitious independents
Office space	New pattern of working from home reduces number and frequency of office workers commuting to the town	Working from home and reduced out-commuting increase opportunity for more localised spending and activity
	Demand for office spaces decline	Opportunity for combined agile office hubs and shared workspace.
Online shopping	Continued growth of online shopping results in long term loss of footfall	Brick & mortar businesses grow trade online to reach new markets & customers
	Retail – require smaller sales areas and different type of space to allow increased storage and back office	Business offering quality, specialist and experience led retail and personal services likely to grow.
Property	Decline in demand for retail and office space results in decline in property value/income for owners/investors	Lower 'attractive' rents and more flexible terms encourages independent business start-ups and existing business growth
	Declining viability and willingness to adapt property and invest	Landlords/property owners are incentivised to work in partnership with public sector and play an active role in regeneration
Place & attractiveness	Cautious consumers and ongoing health concerns attracts customers to locations considered safer e.g. retail parks	Opportunity to re-shape public spaces and improve pedestrian environments
	Loss of retail character and dominance of shopping	Space for new and intensified uses – residential, leisure, health, culture. Growth of new customers – e.g., homeworker meetings/ lunchtime hospitality
	Loss of hospitality, culture, leisure businesses that offer 'experiences' but have also been hardest hit	Greater emphasis on experience & 'place'

Figure 1: Drivers of change

3 Key Issues & Opportunities for the Town Centre

People

Understanding the characteristics of the people who live nearby and potentially work, visit and use the town centre is an underpinning element of the masterplan. Once social distancing restrictions are lifted, it will become clearer how people’s behaviour and preferences have been altered, and this will determine how businesses, leisure and cultural attractions adapt as a result. It will be important for the masterplan to safeguard the businesses and activities that current customers want as well as attracting new users by understanding who they are and what they desire.

Community Profile

CACI data³ provides a 2020 data position prior to the pandemic and confirms a relatively wealthy shopper profile of those using Carmarthen town centre (Figure 2).

It confirmed town centre visitors as orientated towards the Acorn group profile categories of ‘Comfortable Communities’, particularly the dominant sub-category of ‘countryside communities’ which accounted for approximately half of all centre users - in part a reflection of the wide rural hinterland served by Carmarthen. There is also an underlying level of affluence particularly associated with ‘mature money’ which result in over 70% of town centre users considered to be above average in prosperity terms with associated levels of expenditure but equally expectations for quality and variety to meet requirements. By contrast, circa 23% of town centre users are identified as ‘Financially Stretched’ with the majority sub-group identified as ‘modest means’ (younger families in smaller homes with below average incomes) which reflect the importance of value and convenience as key considerations.

³CACI Retail Footprint Report – Carmarthen 2020

Category	% Using the centre
Comfortable Communities	58%
Affluent Achievers	14%
Financially Stretched	23%

Figure 2 – Acorn consumer segmentation. Source CACI 2020

Spending

In assessing expenditure patterns, CACI confirms the role, function and attraction of Carmarthen town centre as an important regional centre with over 77% (£74m) of comparison (non-food) expenditure from its shopping catchment area. In addition, local workers are estimated to contribute £5m (5.2%) of expenditure whilst the contribution of tourists/visitors to the town centre is significant – accounting for £22m (17.7%) of expenditure. Together, these spend estimates confirm the multi-functional appeal of the town centre to a variety of users with nearly a quarter of expenditure derived from visitors, and to a lesser extent, local workers.

Analysis of average weekly spend data by CACI (Figure 3) recognise the essential expenditure on convenience goods (food) but also at the town centre level of expenditure on clothing/footwear, and eating & drinking. This reflects the level of clothing and footwear offer available in the town centre, split across national multiples and independents, whilst the spend on local food and drink facilities indicate the destination status for many users.

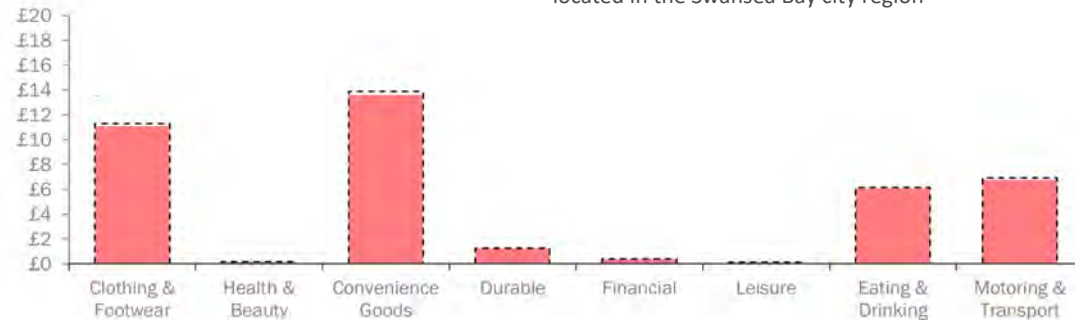


Figure 3: Average weekly household spend
Source: CACI 2020 – Dash line represent average for towns located in the Swansea Bay city region

Commuting

Prior to COVID-19, some 1,000 people commuted daily out of Carmarthen with the main destinations for commuters identified to be Swansea, Llanelli, Cross Hands and Cardiff. By contrast, as a county town and key regional location for many public sector organisations, Carmarthen attracts more in-commuters than out-commuters, particularly Llanelli, and the Cross Hands, Kidwelly and Ammanford areas. The potential for future changes in commuting trends and resultant implications for working patterns and workspace requirements (including flexible and innovative workspace), will likely have implications for the town centre.

Outlook

Whilst Carmarthen town centre has proved to be a popular and well performing centre, it is recognised the town centre has been more exposed to the impacts of COVID-19 when compared to many other town centres for a variety of reasons. This includes its core composition and offer which is predominantly oriented towards non-essential, leisure and hospitality uses but also as a consequence of its status as a county town and regional shopping/leisure destination to a wide hinterland. The direct impacts of lockdown, temporary closures, travel restrictions on visitors and working from home by previously centrally based workers have, collectively, contributed to falling footfall and reduced expenditure in the town centre.

This remains a challenge but there remain fundamental and positive credentials for the town centre which offers a unique cultural and heritage destination set in the context of its strong foundation of specialist independents and national multiples together with focus for entertainment, arts, hospitality, work and education. Furthermore, the local area and socio-economic profile of existing town centre users indicate a relatively affluent population which offers a good base for supporting recovery from a regeneration and investment perspective.

The town is identified as an area of Transformation⁴ and focus for investment particularly at Carmarthen West following the delivery of Yr Egin creative

and digital centre delivered at University of Wales Trinity Saint David. This offers potential to expand the creative and digital sector in the town centre, potentially linked to a greater student presence in the centre given the significant number of students at the university and also Coleg Sir Gar. The town centre is an integral element of this 'Transformation' with the town centre regeneration masterplan⁵ outlining key priorities for the central area. This recovery masterplan complements the existing framework which is supported by the ongoing work of the Regeneration Forum's sub-groups.

At the national level, Carmarthen is identified as a Regional Growth Area in the Future Wales plan⁶ which seeks to grow, develop and offer a variety of commercial and public services that will act as the focal point for their areas. Coupled with the principle of 'Town Centres First', this has potential to further strengthen investment and facilities in Carmarthen town centre.

⁴ A strategic regeneration plan for Carmarthenshire 2015-2030 – Transformations, Carmarthenshire CC

⁵ Carmarthen Town Regeneration Masterplan 2014 – 2030, Capita 2014

⁶ Future Wales: The National Plan 2040, Welsh Government 2021

Business

The key driver of the recovery masterplan is the need to safeguard viable local businesses particularly those which contribute to quality, experience and diversity of uses. The masterplan also recognises the need to support businesses which are capable of opening up and responding to new markets, and targeting/capturing new customers, whether they are new enterprises or established businesses ambitious to evolve and grow.

CACI data for Carmarthen town centre (Figure 4) confirms the composition which can be characterised by an over representation of health and beauty, 'other' retail and eating/drinking offer. This is not surprising given the scale, diversity and extent of the retail offer. Equally, the concentration on non-essential retail confirms a low level of convenience (food) provision. The changing nature of the retail sector will likely further impact on the composition of the town centre although Carmarthen continues to retain a healthy range, choice and offer of clothing and footwear retailers, whilst the shift towards more personal and experience led services such as leisure, health and beauty, and eating & drinking, appear to be well established in supporting these trends.

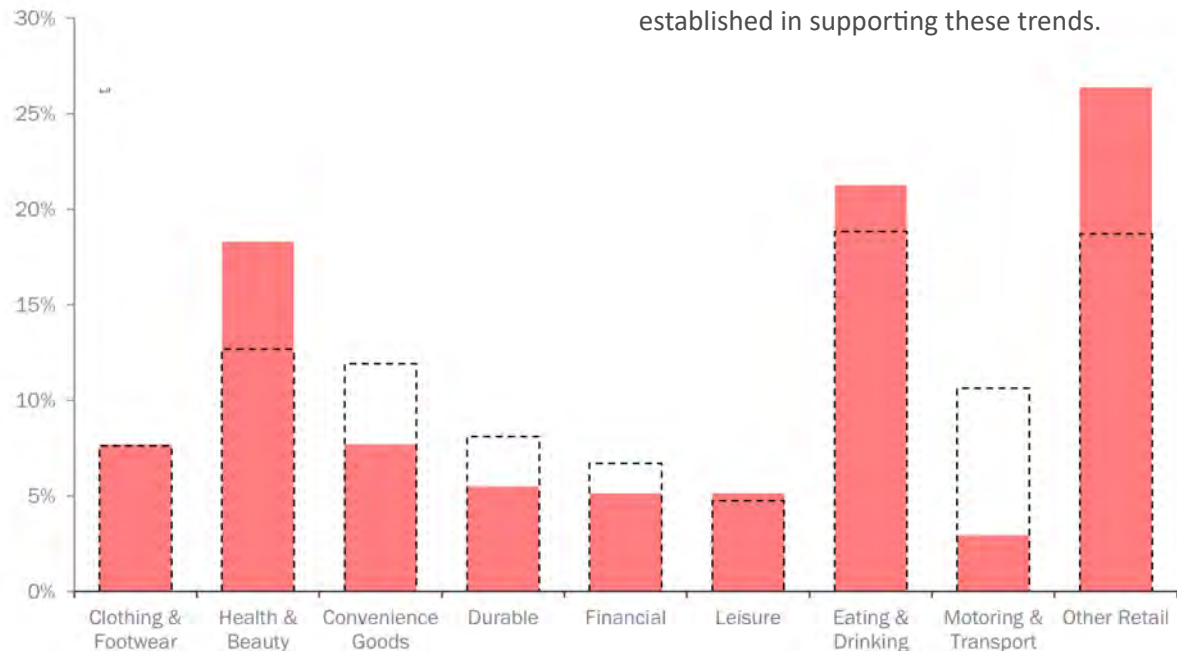


Figure 4: Town centre composition

Source: CACI 2020 – Dash line represent average for towns located in the Swansea Bay city region

Diversity & Speciality

The town centre provides a comprehensive blended mix of uses and services, many by high quality independent businesses (Figure 5) which contribute to its attraction and appeal as a visit destination. This variety and choice extends across numerous uses, some specialist in nature and which have developed a loyal customer base. This mix of independents ensures a unique and distinct shopping, leisure and hospitality experience with certain parts of the town centre characterised as 'independent quarters' such as King Street, which differentiate from other areas of the centre. In addition, the very nature of independent businesses ensures variety of product offer; customer experience, advice and service, and shop-front and display.

The extent of the independent business community in the town centre provides opportunities to develop and strengthen representation throughout the town, particularly given the ability to more readily manage, respond and implement change. There is good evidence of business expansion by independent retailers in the town centre, including take up of larger vacant units formally occupied by national multiples. This reflects a positive commitment by occupiers to 'scale up' and refocus their presence and position alongside flexibility and support on the part of landlords to encourage and promote opportunities for those who previously faced barriers to larger premises.

Creative Industries

The significant investment at Yr Egin represents a strategic opportunity to grow Carmarthen's role as a creative industries hub based around Welsh Language media. To capitalise on this unique facility, this recovery masterplan recognises the potential to explore and promote opportunities for creative and digital industries in the town centre, including its potential to link activities with the University of Wales Trinity Saint David. This has implications for supporting new activities and uses of buildings (potentially re-purposing vacant properties) alongside the creation of new footfall generators and importantly help to further promote the creative offer of Carmarthen.



Figure 5: Examples of independent businesses in Carmarthen town centre

Business Property

With weakening demand and the general decline in retail (including larger format stores), opportunities exist to repurpose and adapt a large amount of town centre property. A consequence of structural change has been the growth in the vacancy rate, as evidenced in Carmarthen town centre, with particular issues arising from the closure of national multiples and resultant large vacant units which present greater challenges for securing realistic prospects for reoccupation. Vacancies are distributed throughout the centre although a concentration of units exist in Red Street and Cambrian Way whilst the owners of St Catherine's Walk and Merlin's Walk are proactively seeking to address voids where they exist, which include the closure of Debenhams, the largest unit and a significant attractor for the town centre.

The key issue will be to focus beyond retail use and to avoid a 'hollowing out' of the town centre. There will be the need to secure new occupiers with attention and priority on identifying new uses which can drive footfall and activity such as residential, leisure, workspace, education, community and public services. Given the extent of the public sector presence in Carmarthen, opportunities exist for the County Council and its partners, including the university and college to explore the scope to bring services and facilities into the town centre that can make use of vacant premises. This will be of relevance to the largest units.

In addition, to ensure the independent and small business community can grow and flourish locally, it will be important to ensure suitable property is available, which can provide for modern and flexible needs but also ensures flexibility, innovation and affordability in regard to rental and lease terms/conditions. This will better help support opportunistic businesses willing to invest whilst responding to changes in market and commercial trends. Where re-purposing and adaptation is necessary, it will be important to recognise the viability considerations for property owners/ investors.

The proposed Local Development Order (LDO) for Carmarthen town centre will be a critical policy tool to promote flexibility of uses that can be enacted relatively quickly. An LDO, if approved in 2021, will provide general planning consent for a wider range of uses at ground and upper floor level, removing the need for planning applications and streamlines the planning system, lowering barriers to a range of alternative uses and investment.

Digital and Social Media

Growing small businesses and transitioning to medium and potentially larger scale operations requires improved productivity and market reach. It is likely that growing an effective online customer base will be an important part of this future business growth.

Our review of Carmarthen digital health suggests that not enough is being done by most local businesses online to maximise their communication - although the presence of some proactive local businesses, community groups and Carmarthen BID are seeking to raise the vital importance of digital and social media exposure to help raise business profile and profitability.

66% of UK consumers spend 3hr day on social media

52% of UK consumers use social media to research purchases

Only 30% of Carmarthen's town centre businesses active on social media

There is major scope to improve the online presence of the town centre businesses with data suggesting generally weak levels of social media engagement by the business community with less than a third actively engaged.

Given the vital importance of online presence for modern business, this could be strengthened considerably to drive further local and independent business growth.

Place

The Recovery Masterplan has benefited from the 'Carmarthen Town Regeneration Masterplan', an earlier masterplanning exercise undertaken in 2014. This study appraises the urban conditions that characterise the town centre and identifies a number of potential projects. The Recovery Masterplan does not seek to replicate this work, but instead review it alongside other ongoing and planned projects, to identify priority interventions and strategies to support the survival and recovery of the town centre especially in response to the pandemic and notable trends in the retail sector. These 'Place Projects' are described in more detail in the following sections.

With regard to the town's sense of identity, Carmarthen claims to be the oldest town in Wales and evidence of its rich history is certainly a key defining feature of the town centre. Its character is largely defined by a medieval street pattern and numerous listed buildings, particularly concentrated along King Street and Nott Square including the Grade I listed Guildhall and St Peter's Church, and the Castle, which is Grade I listed and a Scheduled Ancient Monument.

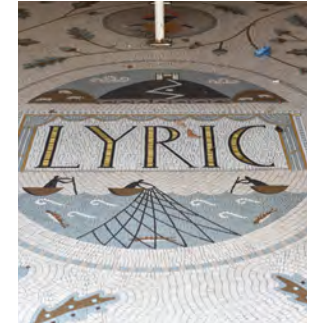
The structure of the town centre has a distinctly radial pattern with key routes converging on the junction of Blue Street, Red Street and Guildhall Square.

From here, the historic character continues to the west along Lammas Street and east along King Street which connects with Nott Square and Guildhall Square with St Peter's Church. However, to the north of these routes, the primary retail frontage which lines Red Street connecting to the St Catherine's Centre is defined by large format retail units and modern architecture and public realm, in stark contrast to the adjacent areas of heritage.

This radial pattern with numerous changes in direction and irregular arrangement creates a characterful network of streets, spaces and alleyways, and the perception that the town centre is extensive. Between these radial routes the townscape is often fragmented and dominated by service yards, car parks and the blank rears of buildings.

Generally, the quality of the public realm is lacklustre and does not complement or meet the standards set by its attractive historic buildings. There is also a distinct lack of green space and trees. Although relatively close the River Towy, the town centres connection with the riverside is compromised by the change in level, lack of direct pedestrian routes, and the busy Coracle Way road.

Overall, Carmarthen benefits from a wealth of historic and cultural assets, and places of interest however, the potential of these assets is currently not realised. Investment to reinforce the town's 'sense of place' is required to help create a setting that supports businesses, attracts new visitors and creates a desirable place to live and spend time in.





Opportunity for retail core to adapt to changing context and refresh its public realm and street activity

Opportunities to enhance existing routes and create new spaces

Opportunity to define and celebrate a 'Cultural Quarter' centred on King Street

Imperative to enhance the setting of the historic core as the 'heart' of the town centre

Connection and relationship between the town centre and the riverside should be strengthened

Summary of Key Challenges & Opportunities

Challenges

- Vulnerability and threat to its regional shopping role including the loss of major branded retail
- Shift to remote working has led to a marked reduction in office workers using the town centre particularly given the extent of the public sector in Carmarthen
- Growth in vacant property, many relatively large which have potential to ‘hollow out’ the town centre
- Maintaining a strong enough attraction and appeal of the centre to a wide and relatively affluent catchment area compared to other nearby centres
- Weakening demand for retail and realistic prospects for securing take-up given an oversupply of units
- Low levels of digital business engagement by businesses
- Safeguarding and retaining the remaining retail anchors and leisure attractors
- Flood risk at the riverside edge of town centre

Opportunities

- The mix of retail, leisure and employment mixed with culture and heritage which already provide an experience-led destination
- Strong foundation base of interesting and specialist independents
- Existing entertainment, hospitality, arts, culture and theatre including ongoing investment
- Re-purposing of the central core to create new uses and activities including flexible workspace and residential
- Extend public sector services and facilities in the town centre
- Requirements in for Carmarthen town for a new hotel
- Build on the creative and digital industry at Yr Egin to develop a greater role for the creative industries
- Extend the local markets (indoor and street) to ‘showcase local’
- Enhance outdoor spaces to support the growth of hospitality, social gathering and well being
- Promote the quality of place and improve linkages through the town centre
- Jacksons Lane as a focus for regeneration activity

Summary of Key Objectives

To drive forward the plan for recovery and growth and to provide a focus for the strategy and delivery plan the following objectives for the town centre have been identified:

- Safeguard, protect and strengthen the regional role of Carmarthen town centre as a destination for retail, leisure, hospitality, culture, employment, education and residential.
- Concentrate activity on the central core to avoid ‘hollowing out’ and maximise opportunities for a greater mix of uses through the reuse and re-purposing of empty and underused buildings in an area undergoing significant change.
- Strengthen the leisure and hospitality facilities of the town centre to enhance the under-performing evening economy and develop the tourist infrastructure that provides a year-round offer, including the opportunity for a new hotel.
- Support and encourage small and independent businesses to develop, grow and expand in the town centre.
- Expand the public sector presence in the town centre, including opportunities to deliver new service provision (health and well-being, leisure, local services/advice hwb, residential) and collaboration with third sector organisations, to generate footfall ‘anchors’ and utilise empty premises.
- Build on the opportunities for greater links between the University and town centre including the scope for educational and cultural activities to complement the cultural quarter, and specifically the potential for a creative and digital hub linked to Yr Egin.
- Encourage the growth of the outdoor market to include a greater number of stalls and potential for a new theme/style of markets.
- Ensure improvements to the quality of outdoor spaces, especially Jacksons Lane, to deliver a safe, attractive, inviting and stimulating town centre environment that supports the hospitality sector and evening economy.
- Improve pedestrian and cycle linkages throughout the town centre, many of which are of poor quality.
- Establish a SMART town with businesses making best use of digital to grow their market reach, turnover and footfall.
- Initiatives that ensure a range of stakeholders are involved in delivering improvements for the town centre.
- Encourage decarbonisation through low carbon and climate-resilient infrastructure, renewable energy and sustainable developments.
- Support for the use and promotion of the Welsh language and culture.

4 The Recovery Masterplan

Carmarthen town centre faces ongoing challenges and transition as it adapts to wider structural changes and the effects of the pandemic on its regional role as a retail, leisure and employment centre.

A flexible approach towards recovery and growth will be required which seeks to safeguard the town's role as a regional centre for employment and shopping effected by the pandemic. The strategy focusses on the positive attributes that already exist alongside the need for diversification and is driven by a focus to support and nurture local business, promote a mix of uses for a variety of people, and strengthen and rejuvenate the town centre as a more attractive place.

The strategy seeks to broaden and extend the range of uses beyond the traditional retail led and employment role but equally safeguard existing anchors and attractors. This shift and re-purposing towards a multi-purpose destination provides genuine opportunity to respond to the evolution in modern retail, leisure and hospitality trends for existing and new businesses together with genuine encouragement for new uses, particularly residential, flexible workspace, education, cultural and social/community activities. Recent interest from hotel operators in the town centre has provided encouragement that greater levels of diversity can be achieved and would help to grow a generally under-performing evening economy.

The future contribution of the public sector to the town centre, given its long-standing administrative

role, is also likely to change and provides an opportunity to reconsider the way that local services are delivered and more agile working is provided within the town centre.

A greater concentration of new activity on the core town centre will help to support and widen economic activity and vibrancy throughout the day and evening, extending the reasons to visit for local residents, workers and visitors alike.

The town centre also offers significant opportunity for environmental improvement, especially of the public realm to help showcase the quality of the heritage and to encourage greater use of its high-quality outdoor spaces. The central area combines a number of distinct areas and more can be done to promote the town as a genuine experience led destination which maximises the advantages of the town's history, Welsh culture and regional centre facilities.

Spatial Priority Areas

The recovery masterplan is concentrated around four distinct strategy areas, which provide the spatial focus for action and intervention.

The Eastern Gateway/Cultural Quarter

A priority area for improving the public realm and driving regeneration, mixed-use activity and support for small independent businesses, cultural activity and the evening economy in an area that is facing transition with some prominent vacant buildings alongside some core cultural assets and development sites.

The Historic Core

A priority area which represents the heritage asset of the town centre, and the link between the old and new town. Significant opportunity for greater public use of the outdoor spaces as a safe pedestrian focus for cultural, food and drink, and entertainment activities throughout the day/evening alongside qualitative improvements to enhance the outdoor experience.

The Central Commercial Core

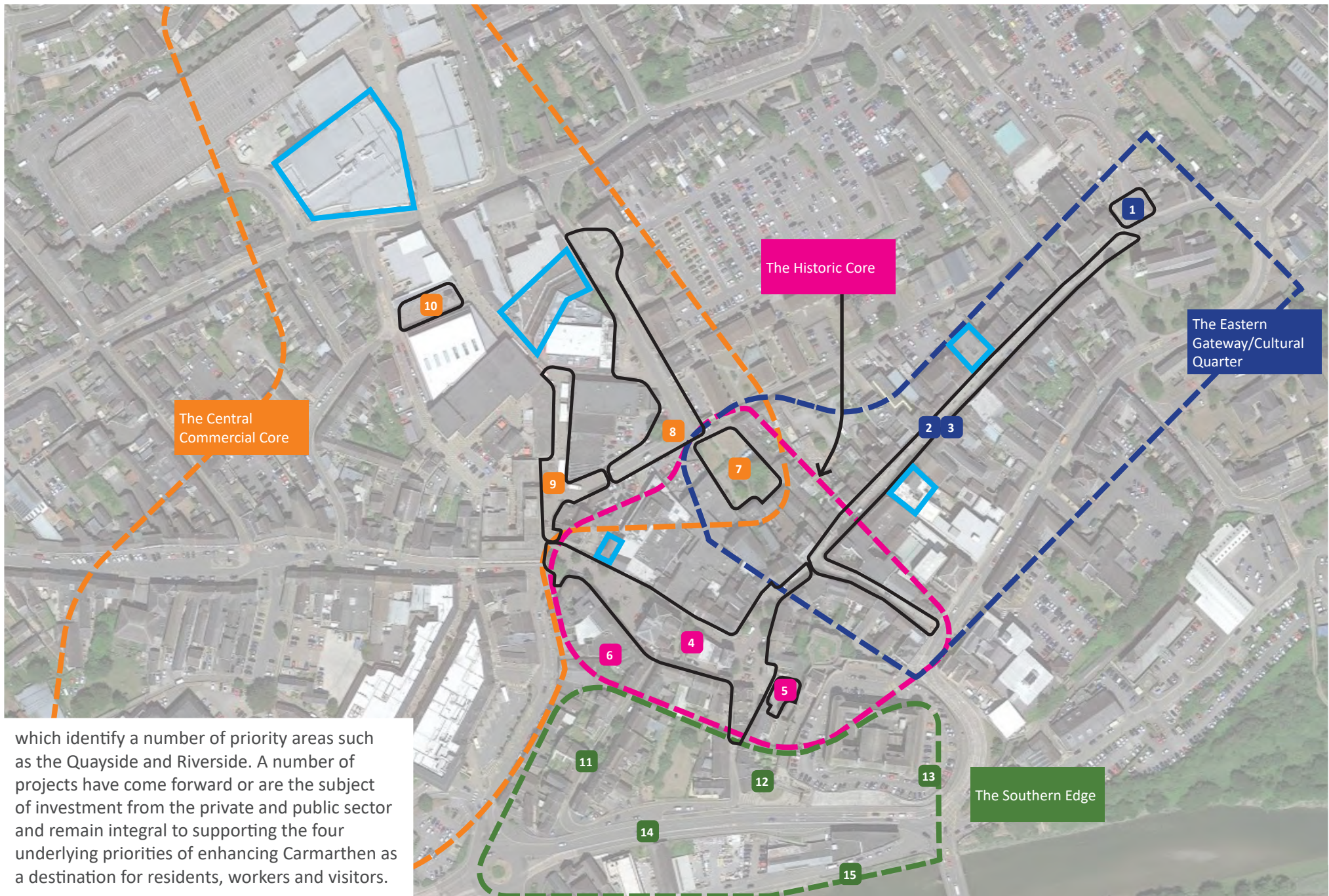
An area for safeguarding the core commercial activity focused on retail, leisure and hospitality, including the shopping centre anchors of Merlin's Walk and St Catherine's Walk together with other existing footfall attractors.

The Southern Edge

The area between the historic core and Coracle Way, including County Hall and Quay Street, which provides linkages towards the Quay and riverside. The area offers scope for qualitative enhancement given the 'gateway' location together with areas of transition, especially in Quay Street.

The focus for the masterplan is centred on the core area of the town centre given the priority objective in the short term to protect and strengthen the appeal and offer of the traditional town centre.

Despite this geographic prioritisation, it remains supportive and complementary to the wider objectives and aspirations identified in the 2014 Carmarthen Town Regeneration Masterplan

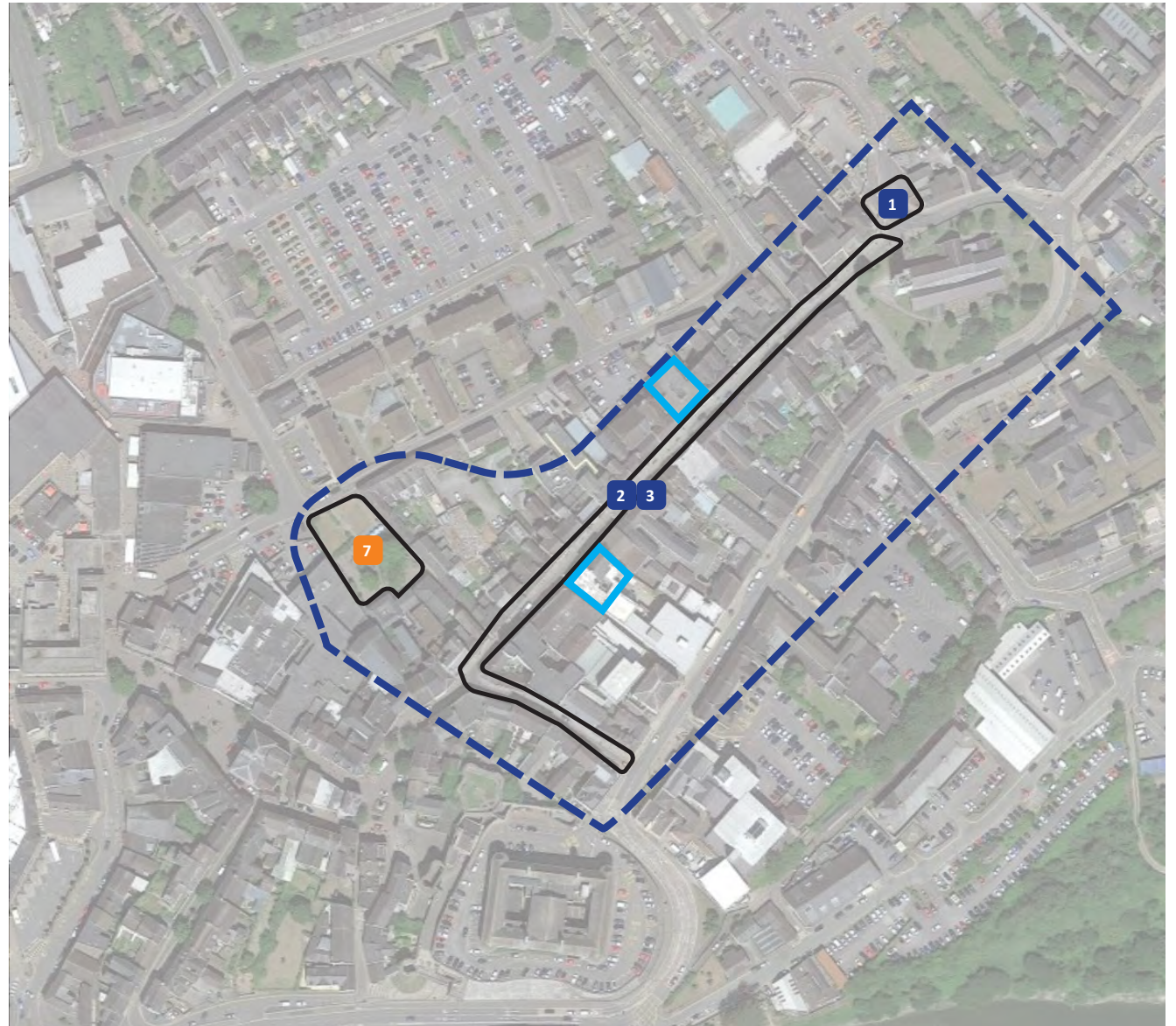


which identify a number of priority areas such as the Quayside and Riverside. A number of projects have come forward or are the subject of investment from the private and public sector and remain integral to supporting the four underlying priorities of enhancing Carmarthen as a destination for residents, workers and visitors.

The Eastern Gateway/Cultural Quarter

Strategic objective:

The strategy is focused on rejuvenating activity, the public realm & built environment, and the range of uses in the heart of the Old Town Quarter, building on the existing heritage and cultural assets such as Peter's Church, Oriol Myrddin, library (housing Carmarthenshire Archives) and Lyric Theatre alongside the independent business community. The temporary pedestrianisation of King Street offer opportunities to investigate longer term changes to encourage street-based activities and improved public realm alongside support for a wider mix of uses, to build on the independent culture of the area alongside scope for new footfall attractors, including the potential for educational related uses, especially a creative industries hub and student residential, linked to the University. A number of prominent vacant buildings exist, especially on King Street (Post Office, Former Family Value unit) which offer large scale opportunities for reuse to improve the qualitative appearance of the area. The area represents the 'independent, cultural quarter' of the town centre and offers good opportunity for building on and expanding the variety of uses to extend economic activity, particularly into the evening, and promoting an artisan village.



Project 1: St Peter's Street Car Park Entrance

Objective

The car park entrance currently detracts from the high quality and historic character of the area and creates a negative first impression.

A scheme comprising proposals for extended footways, natural stone finishes, new barriers, signage, and trees/ornamental planting will help to enhance this point of arrival and complement the character of the area.

Tasks

1. Liaison with the Highways team to agree scope and parameters for design i.e. is a reconfiguration of the highway and access arrangements required? Are other environmental improvements required in the wider car park?
2. Preparation of a brief for the design of an environmental enhancement scheme (Approximately RIBA Stage 4). The study should include:

- Technical highways design as necessary
 - Public realm proposals including paving, planting, boundary walls seating signage, lighting, de-cluttering
 - Review of any existing TROs
 - 'Access for all' appraisal
 - A palette of materials, street furniture and lighting that is coordinated with existing public realm treatment in vicinity of St Peters Church
 - Stakeholder engagement
 - Cost appraisal, risk assessment, delivery timescale
3. In support of the feasibility study, undertake or commission the following:
 - Topographical survey of the study area
 - Utilities, basement and radar surveys
 - Liaison with statutory undertakers to understand potential future works in the area
 - Assessment of funding opportunities



Project 2: King Street/Queen Street Access Improvements

Objective

Kings Street and Queen Street have previously been identified for potential pedestrianisation, and the temporary measures in place to allow for social distancing due to COVID-19, have allowed a preliminary assessment of its effect.

Potential advantages of pedestrianisation include a safer and more pedestrian friendly environment, increased space for external seating, dining and the on-street presentation of wares, space for market stalls to increase footfall. There appears to be few disadvantages as the route is not a strategic through route and does not provide significant on-street parking.

On this basis, the potential for pedestrianisation together with other approaches to managing access to the street, should be further explored taking into consideration access and timing of deliveries; shared surface treatments and the possibility of closure to traffic being limited to seasons.

Any comprehensive redesign should include for the implementation of high-quality materials (including natural stone) and a consistent approach to street furniture to enhance the areas identity.

Tasks

1. Liaison with the Highways team to agree scope and parameters for the feasibility study.
2. Preparation of a brief for a feasibility and options study to explore the range of approaches to improving pedestrian

accessibility (Approximately RIBA Stage 3). The study should include:

- Options and assessment of a variety of design approaches including pedestrianisation, reduced carriageway widths, shared-surfacing, reduced / controlled access for different vehicle users, reduced / no parking, etc.
 - Appraisal of wider network implications and review of existing TROs
 - Opportunities for outside seating, display areas for businesses, market stalls and review pavement licensing arrangements
 - Street furniture and signage audit and proposals for the de-cluttering
 - 'Access for all' appraisal of options
 - A palette of materials, street furniture and lighting that is coordinated with future proposals for the town centre
 - Strategy for stakeholder/ public engagement
 - Cost appraisal; Risk assessment; Delivery timescale
3. In support of the feasibility study, undertake or commission the following:
 - Topographical survey
 - Utilities, basement and radar surveys
 - Liaison with statutory undertakers
 - Assessment of funding opportunities



A redesign of the street environment would create a more attractive and usable space that is welcoming to pedestrians and would create opportunities for street stalls, tables and chairs and events. Vehicular access can be managed to allow deliveries and emergency services in a shared street.



Project 3: Cultural Quarter Enhancement

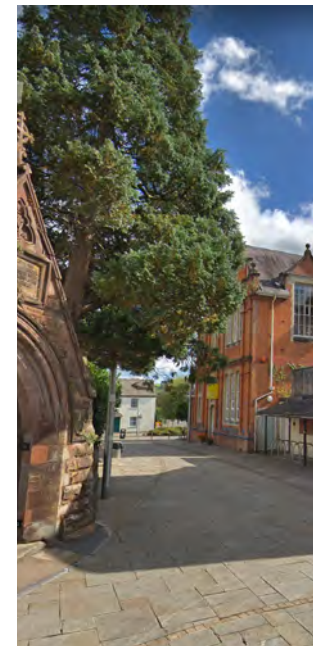
Objective

The idea of a 'Cultural Quarter' based on existing heritage, cultural and educational assets such as St Peters Church, Oriol Myrddin, library (housing Carmarthenshire Archives) and the Lyric Theatre alongside the independent business community, has grown momentum in recent years.

This strategy seeks to consolidate this idea through a wide range of localised and focused improvements which improve the fabric and character of this part of the town and encourage and expand economic, cultural and educational activity.

Tasks

1. Liaise with building and business owners to enhance the appearance and maintenance of shop-fronts and key buildings such as the Art Deco King Street Furnishers, the Post Office, and the portico entrance to the Lyric Theatre.
2. Sundry improvements to the public realm and streetscape including the implementation of consistent bollards and furniture, seating, hanging baskets, seasonal flags, and banners. This is considered an interim measure ahead of long-term public realm improvements.
3. Review the function and appearance of the bike shelter adjacent to the Oriol Myrddin Gallery and consider new cycle infrastructure such as e-bikes, to promote use by students and visitors.
4. Review pavement licence provision and conditions to promote greater use of the external space, al-fresco dining, the evening and night-time economy, and independent traders.
5. Identify suitable locations for market stalls during the temporary access restrictions in King Street and Queen Street and monitor their impact on footfall and local businesses, in consideration of the business case for pedestrianisation.
6. Investigate alternative reuse of prominent vacant properties – including potentially University uses such as student residential, education hub, creative/digital industries.
7. Investigate opportunities for a hotel.
8. Commission artwork to signal the entrance to Jackson's Lane off King Street.
9. Assess the potential value of branding and promoting the area as a distinct 'quarter' and destination within the town centre.



The Historic Core

Strategic objective:

The heritage asset of the town centre, the area centred on Nott Square, Guildhall Square and the Castle provides the transition between the independent & cultural quarter, and the modern shopping centre. The focus of the strategy is on qualitative improvement and enhancement of the existing distinctive, unique built environment and assets alongside more proactive use of this area, by building on existing initiatives and providing the appropriate physical infrastructure and conditions to support greater public use (safe, weather protected) of the outdoor spaces, to accommodate food/drink/hospitality and entertainment/street activities. This is an immediate priority to help extend economic activity of the day and season and respond to social distancing requirements.



Project 4: Guildhall Square & Nott Square

Objective

Guildhall Square, Nott Square and the routes that connect them, represent the historic core of the town centre and a key asset and visitor attraction.

The quality of public realm in these areas does not match the quality or character of its setting and improvements are considered a priority.

In the short term, it is understood that some cosmetic improvements to these key spaces are currently being implemented by the 'Public Realm Group'. In the medium term however, a comprehensive replacement of paving and furniture is required to realise the full potential of this important area.

Note that some of the tasks itemised below may already be underway through the work of the 'Public Realm Group'.

Tasks

1. Consider providing consultant support to the 'Public Realm Group', to audit these key areas in terms of short term improvements.
2. De-cluttering of the space and the implementation of consistent furniture, seating, signage etc.
3. Review pavement licence provision and conditions to promote greater use of the external space, al-fresco dining, the evening and night-time economy, and independent traders.
4. Allocate space to the central parts of the squares for market stalls, street-food stalls and/or covered staging for outside dining areas that are usable during inclement weather and early/late season, etc.). Infrastructure could possibly include power, security, furniture and lighting. Space should take into consideration permitted vehicle routes, deliveries, and emergency access.
5. Licensing and locations for street performance should also be investigated.
6. Celebrate the heritage of the town and its spaces with seasonal flags and banners and decorate with hanging baskets and seasonal lighting.
7. Prepare a brief for the design of a public realm scheme (Approximately RIBA Stage 4). The study should include:
 - Public realm proposals including paving, planting, seating, signage, lighting, de-cluttering
 - Review of any existing TROs
 - 'Access for all' appraisal
 - A palette of materials, street furniture and lighting that is coordinated with a town wide strategy including the replacement of the existing concrete paving with natural stone and furniture with consistent town centre style appropriate to its important historic setting
8. In support of the feasibility study, undertake or commission the following:
 - Stakeholder engagement
 - Cost appraisal, risk assessment, delivery timescale
 - Topographical survey of the study area
 - Utilities, basement and radar surveys
 - Liaison with statutory undertakers to understand potential future works in street
 - Assessment of funding opportunities



Project 5: Castle Entrance

Objective

In association with Guildhall Square and Nott Square, the Castle is a highly valued asset and important visitor attraction. Currently its entrance is severely compromised by clutter and the appearance of adjacent buildings. The environmental enhancement of this area should be a priority.

As with Guildhall Square and Nott Square, the 'Public Realm Group' have identified and are implementing opportunities to improve appearance and accessibility and have successfully introduced an outdoor seating initiative in response to the Covid-19 pandemic. In the medium, a comprehensive redesign of this area should be coordinated with the adjacent Nott Square.

Tasks

1. Consider providing consultant support to the 'Public Realm Group', to audit these key areas in terms of short term improvements.
2. De-clutter the castle entrance space by removing all the street furniture located between the castle and Nott Square.
3. Investigate options to improve the boundary treatment to the northern edge of the castle entrance space and its interface to adjacent buildings. This could include temporary stalls in the short term and a permanent new high stone wall with interpretation and market stalls in the long term. It is understood that a mural to the blank gable wall is currently being considered.
4. Investigate ideas for flags, banners, and a theatrical lighting scheme to enliven the space and reinforce its presence in the town.
5. A medium-term aspiration should be to redesign of the castle entrance space to create usable, level, gathering / performance area. This exercise should be incorporated into a wider scheme for public realm improvements to Nott Square and Guildhall Square.



Project 6: The Lanes

Objective

The numerous alleyways in the town centre are an interesting and distinctive feature of the town's history and morphology however, many are not well maintained and consequently not inviting to pedestrians.

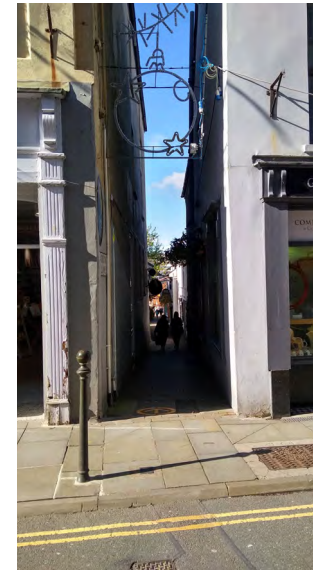
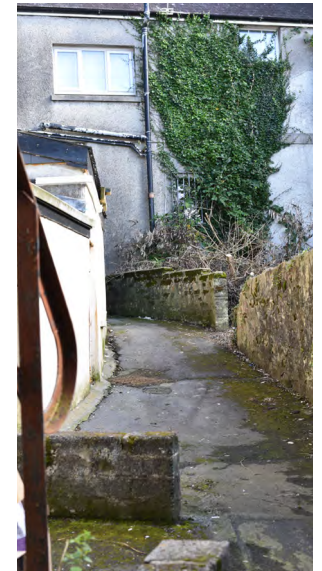
A project to work with building and business owners adjacent to the lanes, to clean, repair, resurface, light, and signpost these routes, will encourage visitors to use them to explore the town.

Tasks

1. Prepare a brief for an audit of the lanes. The audit should include:
 - Mapping and measuring of the lanes.
 - Assessment of the condition of surface materials, levels and accessibility issues.
 - Assessment of boundary treatment including surface finish, condition and ownership.
 - Assessment of lighting
 - Recommendations for improvements including potential constraints, high level costs, and potential programme of implementation
 - Scoping of potential for further project to implement a series of public art projects to reinforce and communicate the culture and heritage of the town and provide additional places of interest and connectivity.



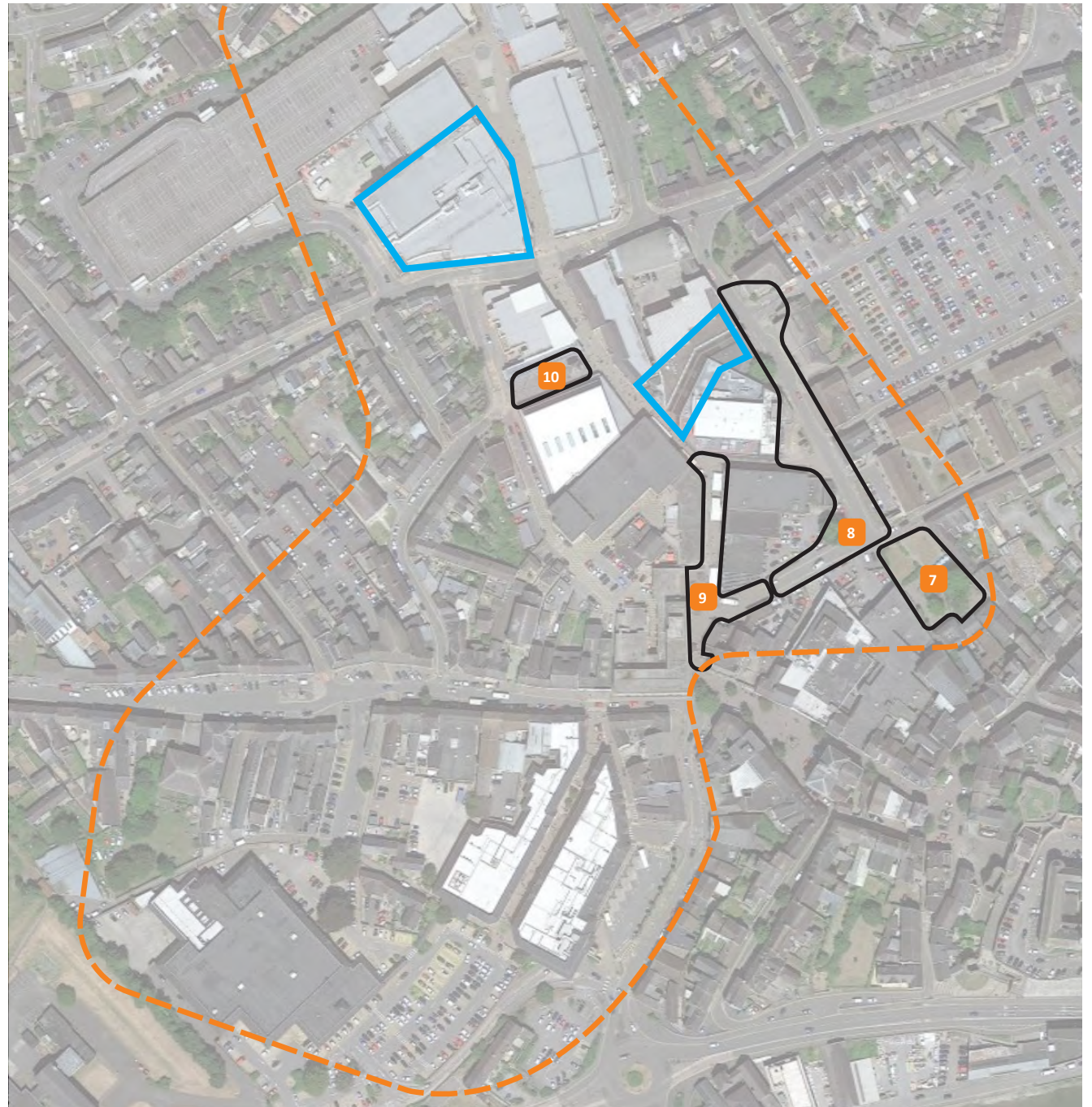
Public realm improvements to the market square at Caernarfon Castle (below) have created a simple, uncluttered space surfaced with natural stone, which allows space events, tables and chairs, etc.



The Central Commercial Core

Strategic objective:

An area which traditionally has been driven by the commercial retail market, the core is facing significant challenges and threats particularly to its retail offer, following the loss of key attractors including Debenhams. The strategy is focused on safeguarding the core retail, leisure and hospitality offer which contains a number of key anchors including Merlin's Walk and St Catherine's Walk and other individual attractors. There are a number of large vacant units which offer opportunities for new uses, including potential facilities for public sector partners to drive activity and footfall but also supporting a broadening of uses. Opportunities for improvements to the public realm, especially in Red Street exist whilst the strategy seeks to support the expansion of the outdoor market and ensure a holistic linkage with private sector aspirations and activity.



Project 7: Jacksons Lane Gardens

Objective

Jackson's Lane is a committed project priority for the town centre and work is already underway to review earlier plans for the area.

The Recovery Masterplan has identified the area as a key asset to the town centre in providing green open space and a valuable alternative experience for visitors, in contrast to the town's numerous hard paved public spaces. It also provides opportunities for existing and new businesses to exploit and so it is recommended that this area is enhanced in terms of its appearance, accessibility, and its potential for accommodating moderate commercial activities and events.

The character of the enhancements should retain the intimate, verdant and 'gardenesque' character that the space currently provides. The inclusion of increased enclosure to screen views (e.g. bin storage areas) and extend the protected environment is also considered to be desirable. It is understood that a separate green/blue infrastructure project has been identified which should ideally be incorporated into future proposals without compromising the other primary objectives.

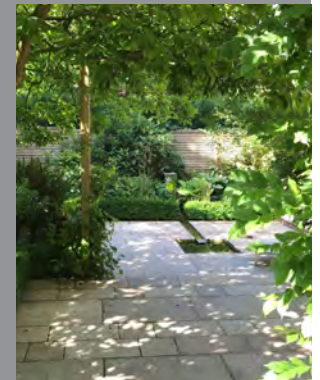
Depending on overall cost and available funds, this project could be developed in conjunction with Project 8: Chapel Street, Cambrian Place, John Street.

Tasks

1. Short term improvements scheme to include repairs and adjustments to the paths and walls, tree maintenance, ornamental planting, and the laying of turf to be implemented for summer 2021.
2. Review of current licences should be granted for businesses to utilise the outside space and erect covered areas and opportunities for pop-up stalls, etc. should be pursued.
3. Preparation of a brief for the comprehensive redesign of the space from concept options to full technical design of the preferred scheme (Approximately RIBA Stage 4). The brief may require some preliminary scoping, consultation and high-level design concepts to provide a clear direction for the detailed stages.
4. The study should include:
 - Developed concept options expressed in 3D through to full technical design ready for construction
 - 'Access for all' appraisal of options
 - A palette of materials, street furniture and lighting potentially unique to the gardens.
 - Strategy for stakeholder/ public engagement
 - Cost appraisal; Risk assessment; Delivery timescale
5. In support of the feasibility study, undertake or commission the following:
 - Topographical survey
 - Utilities, basement and radar surveys
 - Liaison with statutory undertakers
 - Assessment of funding opportunities

The current form of Jackson's Lane provides a tranquil space at the heart of the town, and an attractive alternative destination in comparison to the nearby Nott and Guildhall Square.

Retaining this green and secluded character will provide will a variety of experiences which will appeal to a wide range of visitors.



Project 8: Chapel Street, Cambrian Place, John Street

Objective

This grouping of streets does not provide any significant retail frontage and is dominated by delivery yards and the rears of buildings. However, this area sits between the primary destinations of Queen Street and Red Street and as such, provide important and well used connecting routes for pedestrians.

These streets are generally of poor townscape quality and significantly detract from the otherwise high quality urban environment of the town centre.

Environmental improvements should be implemented to create an attractive, safe and usable streetscape including improved boundaries, active frontages, and an improved street space.

It is understood that elements of this area may be improved by the proposals for Jackson's Lane.

Tasks

1. The scoping of the Jacksons Lane project should include these areas to understand what could be achieved within the budget limitations without compromising the aspirations for the Jacksons Lane project.
2. When the available budget is identified then the scope of the environmental enhancement project for Chapel Street and potentially Cambrian Place and John Street can be established.

3. Prepare a brief (or extend the Jackson's Lane brief) to include concept options to full technical design of streetscape improvements (Approximately RIBA Stage 4). The study should include:

- Developed concept options expressed in 3D through to full technical design ready for construction - including surfaces, walls, planting, pop-up power supplies, signage.
- 'Access for all' appraisal of options
- A palette of materials, street furniture consistent with the wider public realm improvements in the town centre.
- Strategy for stakeholder/ public engagement
- Cost appraisal; Risk assessment; Delivery timescale

4. In support of the feasibility study, undertake or commission the following:

- Topographical survey
- Utilities, basement and radar surveys
- Liaison with statutory undertakers
- Assessment of funding opportunities



The town's historic Market gates are currently held in storage and could be incorporated into the proposals for Chapel Street / Jacksons Lane.

Project 9: Red Street

Objective

The public realm in Red Street should be redesigned in coordination with improvements proposed for Guildhall Square and Nott Square, to significantly enhance its appearance and create more usable space.

The style and appearance should match or complement the materials and furniture used for the pedestrian shopping areas to the north to reinforce the identity of the commercial core and positively contrast with the adjacent historic areas.

Tasks

1. In the short-term, the potential for various enhancements including de-cluttering, cleaning the existing paving, removal of the circular planters and seating, should be considered.
2. Liaise with the owners of the developments fronting Red Street with regard to cleaning and repairing the building elevations fronting the street especially at first floor level to the western side of the street.
3. Identify additional dedicated space for market stalls and pop-up power supplies.
4. Undertake a preliminary scoping for the renewal of the public realm. Although this is considered less of a priority compared to Nott Square and Guildhall Square, the preliminary designs could be carried out at the same time but delivered at a later date.

5. Prepare a brief (or extend the Nott Square / Guildhall Square brief) to include concept options for streetscape improvements (Approximately RIBA Stage 2/3). The study should include:
 - Developed concept options expressed in 3D for paving, planting, furniture, de-cluttering, etc.
 - 'Access for all' appraisal of options
 - A palette of materials, street furniture consistent with the wider public realm improvements in the town centre.
 - Strategy for stakeholder/ public engagement
 - High-level cost appraisal; Risk assessment; Delivery timescale



Project 10: Market Precinct

Objective

Market Precinct provides space in an otherwise constricted part of the town centre however, it is under-utilised and would benefit from minor maintenance and public realm improvements.

Tasks

1. The existing paving should be repaired and cleaned.
2. Permanent improvements should include:
 - Better use of the space including dedicated areas for market stalls, street food, table and chairs
 - Pop-up power supplies
 - New street furniture to coordinate with a town-wide public realm strategy
 - Lighting scheme to create ambient light effect



The Southern Edge

Strategic objective:

A relatively compact and mixed area, which represents a historic linkage from the heritage core to a main gateway and the riverside. Quay Street is transitioning from an office location (mainly to residential) although challenges remain whilst the wider environment, including around County Hall offers scope for qualitative improvements. Recognising the importance of the riverside (viewed beyond the short term), an enhancement of safe and attractive links is considered important for encouraging greater access to the waterfront.



Project 11: Quay Street

Objective / Tasks

A refresh and encouragement of increased occupancy in this attractive street linking the town centre with the riverside.

1. Liaise with building and business owners to enhance the appearance and maintenance of buildings.
2. Sundry improvements to the public realm and streetscape including the implementation of consistent bollards and furniture, with a longer-term aspiration for repaving.

12. Castle Wall overlooking Coracle Way

Objective / Tasks

Minor repairs and enhancement to better present the historic walls as a defining feature on approach to the town centre.

1. The areas adjacent to the remnant castle walls require various environmental improvements including repainting (or artworks) to the adjacent gable walls, a lighting scheme to the castle wall, repair and repainting of the metal railings and improved access/ way-finding for routes to the river.

13. County Hall

Objective / Tasks

The stone-faced retaining wall to the southern side of County Hall should be cleaned and the installation of a lighting scheme to walls and building considered, as this area demarcates the edge of the town centre on approach from the south.

1. Obtain quotes for wall cleaning and repair.

14. River Towy Connection

Objective / Tasks

An improved pedestrian connection including road crossings linking the town centre with the riverside should be investigated.

1. Outline feasibility study to identify opportunities to create direct pedestrian connections, considering access for all, way-finding and improved road crossing at Coracle Way.

15. Riverside

Objective / Tasks

Scope and initiate a long-term strategy for the management of flooding events at the riverside to help aspirations to regenerate the area and better connect it with the town centre.

Town Centre Wide Strategies

Objective / Tasks

There are a number of town centre wide initiatives which will directly support and complement the recovery masterplan. In some cases, the objectives and initiatives are identified for delivery by Carmarthen BID as outlined in the four priorities of its Business Plan and form the focus for the Regeneration Forum Sub-Groups.

1. The preparation of a town centre design guide to establish a suite of paving, furniture, signage and lighting should be commissioned to help ensure the coordination of the various public realm schemes identified as part of Recovery Masterplan and to help guide other future projects.
2. Brown tourist signage located on approaches to the town centre, to promote the key attractions.

Property Strategy

A core element of the recovery masterplan is property led and reflects the importance of a property strategy which directly supports and contributes to the objectives of recovery and future town centre opportunities.

The impact of the Covid pandemic has accelerated many structural trends which have increasingly shaped the high street over recent years. This is most evident in the shifting composition and use of town centres, especially change in the retail sector and to a lesser extent office market. At the local level this has led to an increase in vacant units in Carmarthen town centre especially in the Old Town Quarter (e.g. King Street, Queen Street), Quay Street and the commercial core including Red Street, Cambrian Way and larger voids in St Catherine's Walk.

The pressures and closures facing national multiple retailers has major implications for the town centre given its focus for many national operators that has resulted in the loss of a number of key attractors, primarily mid-fashion clothing and footwear retailers. This presents major challenges for securing new and viable reoccupation reflecting the large size of units involved and declining retail demand. The physical oversupply of retail units emphasise the importance of securing alternative uses which will help to broaden the range of activities and offer, extend 'dwell time' and expand the reasons to visit the town centre throughout the day and evening for

residents, workers and visitors. The strengthening of the town centre evening economy and associated activity forms an integral element of the recovery masterplan.

Whilst a core objective of the masterplan seeks to safeguard the town centre's regional role for retail, leisure and employment, it also seeks to encourage and promote new uses with attention on vacant and underutilised premises. This priority should focus on the primary shopping streets which have lost, and are likely to continue to lose, national multiples. It seeks to encourage a wider mix of uses including flexible workspace, residential, hotel, leisure, education and community use, including the re-purposing of property. This will require engagement with property owners, investors, the development industry and prospective occupiers. There will also be 'areas of opportunity' which offer scope for improvements to existing property together with some sites which represent more comprehensive development opportunities in the longer term, such as Cambrian Way.

The confirmed closure of Debenhams department store will be a significant loss for Carmarthen town centre, particularly where the realistic prospects for reoccupation of a large, prominent unit by a single occupier is challenging. An innovative approach will be required and will likely necessitate public sector intervention to maximise the potential for alternative use(s). There are other large buildings on King Street (for example, former Post Office and

former Family Value unit) which also offer potential for a mix of uses including residential, hotel and workspace.

The strong public sector presence in Carmarthen presents good opportunities to investigate, develop and grow public sector work hubs from large vacant town centre premises. This would help generate new footfall including scope for co-location and collaboration via shared workspace/offices. The potential by Carmarthenshire CC to deliver a Hwb facility (currently absent in the town centre but an ambition) and possibly leisure activities (such as a 24/7 fitness suite and play facilities subject to further investigation) reflects the types of activity that could be provided. Other key local partners including Hywel Dda Heath Board (in the process of reviewing its property estate related to non-clinical and primary care services), University of Wales Trinity St David and Coleg Sir Gar could also operate community health and education services from town centre premises. The main issue is the strong potential that exists to drive more social and community activity by the public sector (alongside third sector partners) given the availability of large vacant units to accommodate these uses.

Project 1: Local Market Insight

Objective

In order to investigate and encourage realistic opportunities for new town centre uses, particularly through the reuse/re-purposing of vacant and underutilised premises, a property strategy requires market knowledge and proactive engagement with property owners/landlords/investors and commercial property agents active in the town centre. This masterplan has involved detailed discussion with local property owners, particularly the shopping centre owners and local agents, which is considered essential to manage change and ensure early understanding of ownership intentions and aspirations, and market/occupier requirements. Ongoing dialogue will be required and actions will need to align closely with the business support strategy which seeks to encourage new business activities, including the role of property in supporting a range of innovative and flexible accommodation and commercial terms/conditions for occupiers. This objective will:

- Investigate and identify key property assets that represent suitable, realistic opportunities for new uses beyond retail;
- Encourage property owners, investors and developers to consider alternative uses and re-purposing of assets that deliver economic and community value and drive town centre investment;
- Build and promote investor confidence in the town centre with support for a wider mix of uses and encouragement of modern and flexible uses;
- Encourage more flexible and innovative commercial terms/conditions for prospective occupiers especially independents to maximise affordability and de-risk exposure for landlords.

Benefits

- Reduced vacant property rates
- Increased investor confidence
- Increased level of property improvements and refurbishments that supports local demand
- Broader range of town centre uses including residential
- Greater flexibility that encourages enterprise and business growth

Tasks

1. Undertake regular audit and monitoring of vacant premises in the town centre to identify key landowners and investors and establish where possible owner intentions.
2. Liaise with the development industry where known requirements exist, with priority to direct new investment to the town centre.
3. Investigate potential to establish a Property Owners/Investors/Commercial Agents Forum on a regular basis to monitor property issues, identify actions/opportunities for the town centre and investigate incentives to support and encourage take up of vacant properties. In addition, maintain dialogue with key town centre property owners e.g. shopping centres to manage risk and structural change relevant to their assets.

Project 2: Local Development Order

Objective

Proposals are being examined for a Carmarthen town centre Local Development Order (LDO), a planning policy tool that promotes greater flexibility and opportunity for a wider range and mix of uses in the town centre. If approved, it is important this is promoted to property owners and commercial agents to communicate the benefits of the LDO particularly at a time of major change in the property market.

Benefits

- Greater flexibility for the property market
- Directing investment towards town centre priority areas
- Increasing the viability of building improvements and mixed uses

Tasks

1. Publicise and actively promote the advantages of the Local Development Order (LDO) to property owners/landlords/developers and local commercial agents to encourage opportunities for greater flexibility of uses and re-purposing of assets, including signposting of relevant Council support initiatives where appropriate.

2. If necessary, monitor and review the LDO boundary to ensure it reflects the need for a smaller town centre and to maintain a concentration of investment in the core commercial areas.
3. Promote the opportunities for residential uses in the town centre particularly in supporting more viable development. This could include opportunities to partner with Carmarthenshire CC Housing Services to deliver increased levels of affordable properties to rent.

Project 3: Funding Support

Objectives

There are key town centre properties which contribute to the objectives of the recovery masterplan and the wider health of the town centre, but which are likely to require a targeted regeneration investment through public sector intervention given the scale, significance and potential complexity of the properties. It will be crucial to ensure these key properties, whether vacant or subject to a change in circumstances, are brought back into beneficial use given their prospects to accommodate, potentially via re-purposing, new activities and uses which can act as anchors and footfall attractors and deliver new investment. The opportunity also exists to target properties in need of qualitative improvement to improve the quality of the built environment.

Benefits

- Intervening in property to deliver objectives for targeted priority areas
- Increasing the viability of building improvements and mixed uses
- Increasing investor confidence and encouraging the private sector to invest

Task

1. Establish a target list of strategic acquisitions that can draw down funding from the Welsh Government Transforming Towns Programme, which is available for key properties in the town centre.
2. Identify and establish key target properties in town centres and keep under regular review (which align with market knowledge from Project 1 Local Market Insight and Project 4 Public Sector Land and Assets).
3. Identify a target list of properties identified as in need of qualitative improvement and prioritisation of actions, including potential support for refurbishment and fit out.

Project 4: Public Sector Land and Assets

Objectives

The role of public sector land and assets offer opportunities to investigate greater co-location and public sector asset collaboration in town centre locations. The objectives of the Transforming Towns Programme and emphasis on Town Centre First clearly support this objective, particularly given the strong presence of the public sector locally and the scope to investigate new service delivery and activities from town centre premises. This approach would contribute to major footfall generators alongside enhanced community access for services and contribute to a mixed-use destination.

This is of particular relevance to Carmarthen given its administrative role as the county town and the extent of the public sector in the wider town. Opportunities exist for Carmarthenshire CC, Hywel Dda Heath Board, University of Wales Trinity St David (such as its initial ideas for an enhanced town centre presence) and Coleg Sir Gar to investigate greater service provision and delivery from town centre premises, including the potential for shared collaborative space. It will also provide opportunities for third sector organisations and offers a realistic prospect for beneficial reuse of large vacant premises where commercial demand is likely to be limited.

Benefits

- Co-location of services and office space
- Retain town centre office footfall and spend

Task

- Proactively working with its public sector partners, including Ystadau Cymru, Carmarthenshire CC will investigate and encourage opportunities for more focused use of town centre locations by the public sector, including the Council's own services together with Hywel Dda Heath Board, University of Wales Trinity St David and Coleg Sir Gar and other relevant organisations.



Project 5: Reform of business rates

Objective

The liability of business rates represents a barrier for many town centre businesses especially independents looking to grow into larger premises, but equally has cost implications for property owners when vacant and considering adaptation. The year-long business rates holiday granted for most Retail, Leisure and Hospitality businesses during 2021/22 as a part of Covid-19 economic support provides a welcome breathing space and encouragement for business to grow whilst a review of longer-term measures should be supported alongside initiatives to encourage business growth.

Benefits

- Property related business costs that support and encourage small business growth.

Task

- To champion changes to the business rates relief and overall taxation model that support the small and independent business to grow in town centre locations.
- Encourage property owners to investigate the adaption of town centre property which offer the greatest business rates efficiency, including innovative approaches to minimise empty rates liability which can be a major barrier to intervention.

Business Support Strategy

A core element of recovery and growth of Carmarthen town centre is the need to safeguard existing businesses alongside support and encouragement for local and independent business growth through a business strategy.

The strategy is to develop greater business resilience and confidence together with an expanded range of new businesses with potential to attract and drive higher footfall. The aim is also to stimulate wider economic benefits for the business community through increased productivity, higher wages and job creation. This can be achieved through a targeted multi-agency approach and the encouragement of the transition from meanwhile use and market trader through to a business located on the main high street.

It is recognised that technology will help to build the town centre of tomorrow and there is the need to focus on supporting the digital health of the local business community whilst installing SMART technology to maximise the benefits of innovation and information. Improved digital infrastructure with associated skills will provide town centre businesses with the ability and confidence to fully exploit technology to improve business performance.

Project 1: Entrepreneurship and Business Support

Objective

Carmarthen town centre is characterised by its diversity of independent businesses, and many specialists that contribute to the wide range and choice on offer. They complement the national multiple retailers, increasingly a weakening presence in the town centre which threatens the town's regional role.

To maintain and strengthen the centre's shopping role, it is important to support the growth of independent businesses and maximise opportunities for new local enterprise. The masterplan has identified examples of recent independent business growth, including the take up of large units in the main shopping centres by prominent local businesses. This is a positive indicator of confidence in the central core and offers good prospects for reuse of vacant units where national retailer demand is more limited. It also reflects the realistic prospects that exist throughout the centre for small businesses, ranging from the indoor (and outdoor) market to more traditional areas such as the Old Town Quarter to scale up. Overall, this closely aligns with the property strategy and is primarily concerned with ensuring the creation of a 'pipeline' of business occupiers across a range of sectors that adds diversity and attraction to the town centre.

In summary, the business support strategy serves several purposes which seek to:

- Establish a place-based approach to business support which reflects the needs and opportunities specific to the town centre
- Encourage new businesses with potential to occupy a range of spaces - meanwhile spaces, market stalls or traditional commercial property
- Inspire micro-businesses to transition into larger premises thereby supporting active take up of town centre accommodation
- Support businesses to become more competitive with greater potential for attracting footfall, raising productivity and employment creation
- Stimulate local demand in support of public and private sector investment e.g., strategic property acquisitions, creation of business incubation space, shared work hubs and investment in reconfiguring and re-purposing property to match new requirements

Benefits

- Increase business enquiries supported with advice and mentoring
- Increased number of businesses and jobs safeguarded
- Increased number of new businesses
- Increased rate of micro/small business growth
- Creation of tailored support packages to encourage investment in key sectors
- Decreased levels of vacant property

Tasks

1. With several agencies providing support to businesses of various sizes and operating across a broad range of sectors, the delivery of business support at a place-based level requires a coordinated and targeted approach.
2. Bring all aspects of business support into one place (either virtual and/or as part of a new town centre Hwb facility), making it clear and simple for local businesses to access and find the help they need. The role of the Carmarthenshire CC Economic Development team is helping to simplify for entrepreneurs and businesses a complex picture of entrepreneurship and business support products and ensuring coordinated multi-agency delivery. Partners include the Council, Business Wales, Federation of Small Businesses, South Wales Chamber, Centre for Business and Social Action, Mentrau Iaith, University of Wales Trinity Saint David, Coleg Sir Gar, etc.
3. Promote and communicate at a town level the range of support available and target entrepreneurs and businesses via schools and colleges, businesses groups and organisations and targeting existing town centre traders.
4. Provide access to a helpline, website, and one-to-one sector-focused support, provide free support and guidance at any stage of the business life-cycle including Starting a business; Growing a business; Developing skills; Networking; Finding finance; Finding a property

Project 2: Digital Town Centre & Skills

Objectives

Given the pressure on the High Street and the impact of COVID-19, it's important that businesses can exploit digital technology, in the same way as supermarkets and shopping centres have done for years. This provides businesses with the opportunity to grow their market and increase turnover locally and globally whilst remaining rooted in the town centre.

The digital health of Carmarthen has demonstrated that just 30% of town centre business are active on social media where the majority of consumers 'hang-out' and can be influenced. Digital health is also influenced by the availability of new technology that exists and is already being used in Welsh towns to help business and places make informed decisions and plan for the future. The objective is to invest in infrastructure in support of creating a SMART town with businesses encouraged to make the best use of digital to grow their business. This includes:

- Putting in place ultra-fast, ultra-reliable connectivity and innovation networks;
- Providing the support, training and encouragement network that helps to create a digital culture and enhanced business skills.

Benefits

- Increased levels of town centre business active on social media

- Increased digital competency levels, qualifications and use of digital technologies
- Increased incidents of business collaboration using social media & technology

Tasks

1. Carmarthenshire CC as lead authority for the Digital Infrastructure Programme of the Swansea Bay City Deal will work to ensure ultra-fast, ultra-reliable digital infrastructure and connectivity is available for the town to include but not limited to full-fibre gigabit-capable broadband, 4G/5G mobile, and Internet of Things (IoT) innovation networks.
2. Continue to build the Carmarthenshire Innovation Network, an 'Internet of Things' network for businesses, communities, and partners to exploit the coverage provided in Carmarthen town.
3. As part of the business support package, and alongside initiatives including Super-Fast Business Wales, investigate and target the town centre with a Digital Initiative through a combination of, but not limited to, digital events, awareness, skills and support to thrive and take advantage of the digital opportunities
4. Adopt a social media data and insights tool for the town and its businesses that provide data, expertise, knowledge, training and support to help them to connect with their audience, to analyse what content engages them and measure what's impacting business results.

Place Management Strategy

Town centres are places that attract a diverse mixture of people from the everyday user, creative, entrepreneurial and explorer, and no masterplan can force a lively attractive centre into being, but it can create the conditions that allow that to grow.

A prosperous town centre must be a place where people are safe, well managed and excited to be. As it is no longer possible to guarantee the daytime footfall of shoppers and local workforce, more than ever the town centre must become more stimulating, exciting, community and cultural destinations both during the day and at night to maximise its appeal to local residents and visitors throughout the year.

The importance of place management and promotion is fundamental to achieving this objective and at the local level is led by Carmarthen Business Improvement District (BID). Whilst relatively new, the BID business plan identifies a draft budget of £845k over the next 5 years for a range of initiatives focused on:

- Improving business profitability: bespoke training - collective waste and recycling – loyalty card - mystery shopper;
- Improve profile of the town: improve branding and signage – “warm welcome/croeso cynnes” initiative – BID website and online business directory – high quality events and festivals;

- Improve parking experience – management and charging incentives – loyalty reward – improved signage and information – ‘meet and greet’ scheme;
- Improve look of the town – cleaning and maintenance – utilise empty shops/shop fronts.

This masterplan fully supports the delivery of the BID’s business plan and outlines objectives and ambitions which align with the BID initiatives to improve the profile of the town centre, support local business to flourish and drive footfall, spend, dwell time and repeat visits in the town centre. A number of actions are at early stages of advancement.

On the basis of the nature of the challenges and opportunities related to its regional role, there will be an advantage to secure town centre operations/initiatives support, working alongside the BID, to ensure project coordination and delivery (recommended as a delivery priority).

Project 1: Culture & entertainment

Objective

As the town centre becomes less about shopping and more about the experience, cultural activity and attractions become more important than ever in ensuring vitality. Cultural destinations (arts, heritage, entertainment) with a broad appeal anchored in the centre need to be safeguarded. Carmarthen town centre supports a good range of

cultural and entertainment assets including Oriel Myrddin (funding secured for redevelopment as a national exhibition asset), Lyric Theatre, the soon to open Carmarthenshire Archives (Y Stordy) at the library, and Vue cinema. The opportunity to build the cultural offer already exists including the linkage with the growth of Yr Egin and the University’s proposals for a cultural quarter. Both would have the potential to enhance the evening economy in the town centre with focus on King Street given its relationship with complementary uses.

There is good scope to build on and expand existing events such as River Festival, Winter Wonderland and St David’s Week alongside the promotion of new high- quality events and festival in the town centre. This would maximise its distinctive historic, cultural and Welsh language appeal as the oldest market town in Wales and raise its reputation and profile as a cultural destination.

Benefits

- Build cultural reputation
- Diversifying town centre attractions
- Increased daytime and evening footfall

Tasks

1. Prioritise growing the calendar and coordination of events led by the BID in partnership with local community groups, to enhance existing events and explore opportunities for a new signature event to showcase and promote Carmarthen.

2. Support cultural venues and actively explore the potential for creative business linked to Yr Egin and the university to develop a creative town centre hub.

Project 2: Transport and Movement

Objective

The reliance on private vehicles needs to diminish if we are to meet the challenges of climate change and a fully integrated public transport service connecting rail, bus and cycle hire schemes would allow people to easily connect with and travel into and around the town from surrounding neighbourhoods. The improvement of public transport service frequency to/from the town centre in the evenings is a known constraint which impacts on the evening economy whilst residents and visitors expect central areas to support sustainable forms of transport. Improved services could also encourage greater use of the town centre by university students.

The cycling credentials of Carmarthen are being strengthened following the implementation of a Brompton Bike Hire scheme at the bus station that provides a versatile folding bike scheme to support travel to work, home, and on public transport. In addition, E-bike charging points will also be installed at St Catherine's Walk and King Street/St Peter's car parks as part of a wider network of electric bike improvements. The County Council have also purchased E-Cargo Bikes for town centre businesses to utilise.

Car parking charges has been a concern of town centre businesses and represents a core priority for Carmarthen BID. At present, the County Council has introduced a pilot free parking scheme in its short stay car parks on Tuesdays and Thursdays between 3.30pm and 6pm. Revenue from car parking funds directly support highway improvements and transportation services in support of the town centre.

Benefits

- Increased levels of walking and cycling journeys
- Increased use of active travel for businesses journeys

Tasks

1. Investigate opportunities with local public transport providers to extend bus service frequency in the evenings, initially on a trial basis.
2. Helping local businesses with new local logistics solutions through E-cargo bikes will require a clear strategy to encourage businesses to adopt the bikes as part of their business and to overcome practical barriers including adequate bike storage.
3. Continue to monitor the impact of town centre car parking charges during the period of recovery from Covid-19 and the effectiveness of the free parking initiatives already in place.

Project 3: Town Centre heritage review

Objective

The unique heritage setting and Conservation Area status of large areas of the town centre ensure a distinctive built environment but equally one which requires sensitive investment and use of enforcement powers to ensure the quality of place is safeguarded and enhanced. A review of the Conservation Area would help identify areas of priority, including scope for targeted intervention where necessary. It would also inform the potential for design guides (including the public realm and shop fronts) which would fully support other initiatives outlined in this masterplan, especially the enhancement of high-quality outdoor spaces and improvements to public realm and buildings.

Benefits

- Enhance the quality of place
- Promote investment in the built environment

Tasks

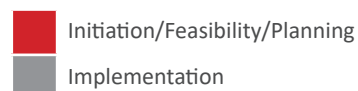
1. Undertake a town centre Conservation Area review to identify areas for action, including the potential for a design guide to inform physical development and build on the recommended projects of the recovery masterplan.

Delivery

Whilst investment in projects funded through programmes continue to make a difference, the masterplan identified that more is required.

The recovery masterplan is for everyone, not just the Carmarthenshire CC, and it will require the commitment and efforts of all stakeholders if the town is to achieve success and deliver continued prosperity for the centre. This new plan is necessary to provide a clear pathway to town centre recovery and growth and it will be focused upon Business, People and Place, providing the framework in which prioritised actions over three levels of importance:

1. Immediate - actioning of quick-win permanent or temporary schemes, to take advantage of potential opportunities arising after the end of lockdown and for the remainder of 2021
2. Short term - delivery within the next 24 months - priority transformational projects that may require planning, funding, approvals and may cause some disruption during delivery
3. Strategic - Significant projects and strategies that will help guide the town centres direction to be resilient and to respond to long term changes



Place projects

- Project 1: St Peter's Street car park entrance
- Project 2: King Street/Queen Street pedestrianisation
- Project 3: Cultural Quarter enhancement
- Project 4: Guildhall Square and Nott Square
- Project 5: Castle entrance
- Project 6: The Lanes
- Project 7: Jacksons Lane Gardens
- Project 8: Chapel Street, Cambrian Place, John Street
- Project 9: Red Street
- Project 10: Market precinct
- Project 11: Quay Street
- Project 12: Castle Wall
- Project 13: County Hall
- Project 14: River Towy connection
- Project 15: Riverside

Property projects

- Project 1: Local Market Insight
- Project 2: Local Development Order
- Project 3: Funding Support
- Project 4: Public Sector Land and Assets
- Project 5: Reform of business rates

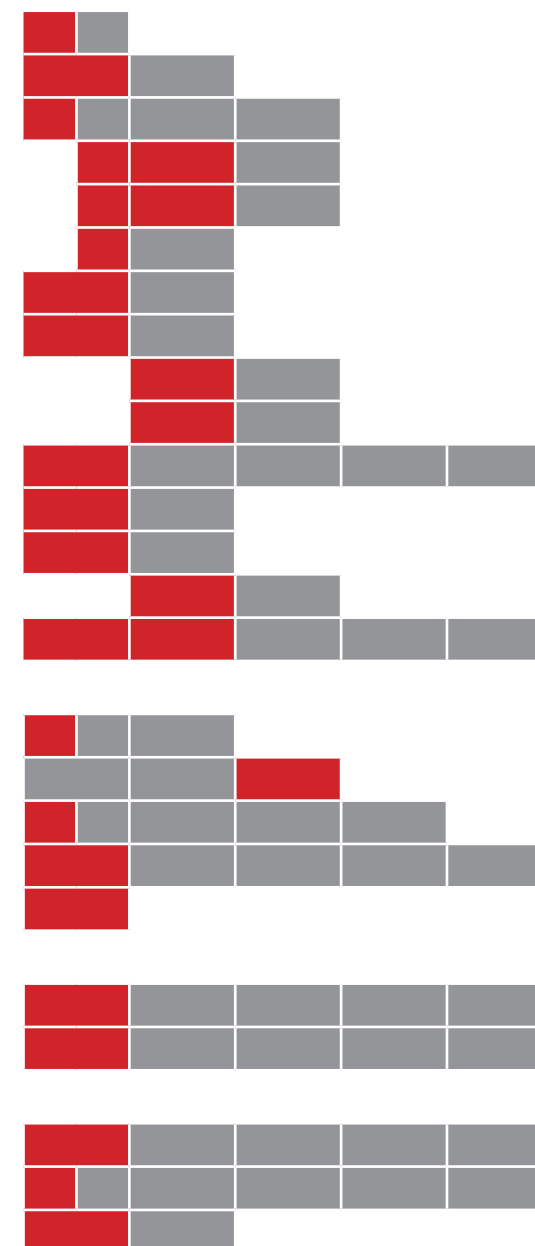
Business projects

- Project 1: Entrepreneurship & Business Support
- Project 2: Digital Town Centre & Skills

Place management projects

- Project 1: Culture and Entertainment
- Project 2: Transport and Movement
- Project 3: Town Centre Heritage Review

Year 1 Year 2 Year 3 Year 4 Year 5+



Priorities

A series of projects are set out by the masterplan, however, it is recognised that it is unlikely that everything can be tackled at once and there will be the need to focus on the most important and high impact projects. All the actions identified support recovery and long term growth. Where more complex but high priority projects are identified, early development of outline business case and design development should be prioritised.

Projects that are anticipated to be funded from existing capital or revenue streams, or through available funding should be a priority.

To help deliver and drive forward the masterplan, the potential exists for funding support to the Local Authority to support a new Town Centre Operations/Initiatives role with strategic oversight to work horizontally across the Council and with other agencies, to broker solutions and drive forward complex initiatives for the recovery of the town centre.

Funding

The funding landscape in Wales is experiencing a period of rapid transformation, this is being led by Welsh Government and the Local Authority in response to the pandemic and the UK Government with responsibility for the replacement funding programs following the UK's departure from the EU. At the time of writing some uncertainty exists around how some funding will be delivered. In light of this, the masterplan needs to be responsive over the coming 12-24 months and aligned to these emerging programs.

Welsh Government – Transforming Towns Programme

Existing Targeted Regeneration Investment (TRI) program comes to an end in 2020/2021 and is replaced by the Transforming Towns Programme. This is a broad and flexible package of support that allows partners to decide upon the most appropriate mix of interventions and how to put them into practice effectively in each town. The new funding package will offer support for a wide range of projects, from green infrastructure developments and the creation of active travel routes to internal and external improvements for business owners, improvement of town centre markets, create new uses for vacant buildings, and drive activity to support the 'digital towns' agenda. Those eligible to apply for funding include local authorities, town centre businesses, Business Improvement Districts and Town and Community Councils.

UK Government

- The UK Government published in March 2021 the prospectus documents on how local areas in Wales will be able to submit bids for the Levelling Up Fund and Shared Prosperity Fund (Community Renewal Fund for 2021-22) as a direct replacement for EU structural funds in Wales.
- Levelling Up Fund – small in scale and geography including regenerating a town centre, local investment in cultural facilities or upgrading local transport infrastructure. Delivered by local authorities who can submit one bid for every MP whose constituency lies wholly within their boundary with preference given to bids from higher priority areas including Carmarthenshire.
- Shared Prosperity Fund – EU Structural Funds will continue until 2023 and replaced through the new UK Shared Prosperity Fund. This new Fund, to be launched in 2022, will operate through the UK Government but to start with the UK Community Renewal Fund being provided for 2021-22 and targets priority local authority areas including Carmarthenshire.

Carmarthenshire County Council

In response to COVID-19, the Council has established underpinning resources to support the recovery and growth of towns and the wider economy. Working with the Welsh Government, a range of new initiatives and business support will be made available.

Business Recovery and Support

Subject to formal approval it is anticipated that the County Council led business recovery and support funding streams will be made available in 2021

- Recovery Fund to safeguard/create sustainable jobs within target growth sectors
- Revenue Support Fund to invest in skills, marketing and diversification to safeguard and grow jobs
- Carmarthenshire Rural Enterprise Fund - development of new and existing business premises
- Transformational Commercial Property Development Fund - to provide financial assistance for the construction of buildings for industrial and commercial use.
- Business Start-Up Fund - capital support for the creation of new businesses resulting directly in the creation of jobs
- Business Growth Fund - support towards capital expenditure projects and specialist revenue expenditure, where new jobs are created

Local Marketing and Distinctiveness

Funding has been secured via the Leader programme to promote rural Carmarthenshire to tourists - led by Carmarthenshire CC Marketing & Media Team to develop stories and reasons to visit, those that amplify

Welsh culture, language, locally produced produce etc. and deliver a marketing action plan including branded promotional material, prepared social media content e.g. text, images and video, a business toolkit.

Empty Premises/Meanwhile Uses

Welsh Government funding to develop a good practice guide for the region enabling communities to develop empty premises into 'meanwhile' spaces or pop up shops, providing practical advice on legal issues, business rates etc. Potential to utilise the £10k Leader funding to fit out empty premises for this purpose.

A Circular Economy - A Sustainable Recovery From Covid-19

The County Council is currently developing a strategy to support local investment in circular businesses and enterprises; that is, enterprises that keep things in use longer, through re-use, repair, re-manufacture and refurbishment, and in doing so, helping regenerate the community by adding jobs and developing skills locally. By promoting this locally, the initiative will not only keep money in circulation within the county but vitally also reduce the impact that Carmarthenshire has on the environment. New potential projects are encouraged with local stakeholders, business owner, entrepreneur, volunteer etc.

The delivery plan indicates time-scales, suggested delivery partners and next steps. In each instance, a detailed review of the project scope would be required and or more detailed design work to provide costings.

The plan includes three stages, short, medium and long term with a suggested level of priority afforded based on stakeholder engagement and the need to complete certain tasks such as data collection to enable the development of key projects.

* Since the publication of the Recovery Masterplan, the Wales Audit Office has published a Regenerating Town Centres Tool Kit for Local Authorities to self assess their approaches and improve their work on town centres. The masterplan has followed the principles of the Tool Kit and Carmarthenshire Council will fully adopt these principles going forward.

Owen Davies Consulting
7A Nevill Street,
Abergavenny. NP7 5AA

