



Llanbydder Economic Recovery & Growth Plan

Prepared for Carmarthenshire County Council

June 2021



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This document has been prepared by: Owen Davies Consulting Ltd. On behalf of Carmarthenshire County Council. Prepared by: Owen Davies, David Jones (Chilmark Consulting), Arwel Jones (Arwel Jones Associates), John Anderson (John Anderson Associates)

Owen Davies Consulting Ltd
 7B Nevill Street
 Abergavenny
 NP7 7DR
www.owendaviesconsulting.co.uk
 07809 594524
owen@owendaviesconsulting.co.uk

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A485

Afon Teifi

B4338

Llanbydder

B4337

1 Purpose

This Recovery and Growth Plan for Llanybydder is concerned with immediate opportunities for sustainable economic recovery as well as the longer term prosperity and growth of the town and surrounding area over the next five years and beyond.

The economic impacts of Coronavirus are extraordinary and unprecedented for our generation. These impacts are mostly negative for the local economy, but there have also been some positives, with communities more engaged and focused on what really matters, and receptive to sustainable actions and supporting their local town and economy.

Prior to the COVID-19 pandemic, Carmarthenshire County Council had launched the Ten Towns initiative in support of the growth and resilience of rural towns across the County. The aim was to develop a long-term strategic vision for each town to support economic growth and to encourage more vibrant, economically sustainable centres. This initiative has been given a new emphasis, in light of the pandemic, to address immediate economic recovery as well as building for longer-term growth.



2 The bigger picture

Carmarthenshire Economic Recovery

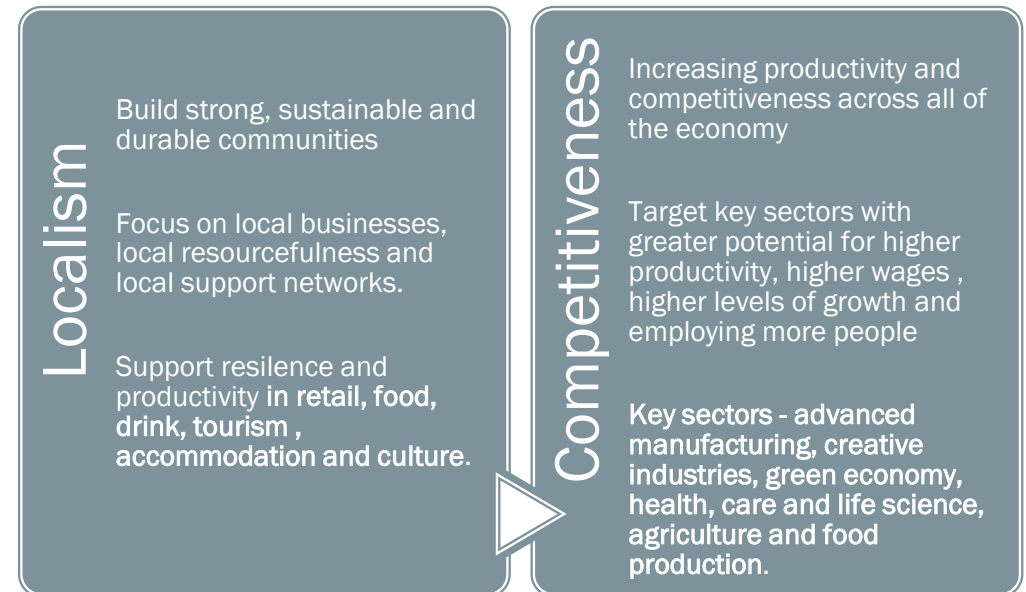
At the beginning of 2021, the economy of Carmarthenshire continues to be heavily influenced by Government interventions in support of jobs and business sectors and uncertainty exists as restrictions fluctuate with the pandemic and fluctuating lockdown measures.

There remains a high level of ambiguity around the pattern of the recovery, as well as the impact of Brexit. Recovery will be slow, and it may take many years for the economy of Carmarthenshire to recover to its previous level, let alone make up the lost ground of the COVID-19 crisis and its aftermath. Therefore, the immediate priority for Carmarthenshire's recovery is to protect jobs and safeguard businesses. There is also a continued focus on the longer-term challenges that constrain growth in Carmarthenshire including low productivity and wages, skills deficits, too few businesses 'scaling-up', and the need for investment in modern business infrastructure and premises.

There are two main pillars for the recovery of the Carmarthenshire economy, i.e. localism and local level action and growing the competitiveness of the whole economy. Actions in support of the recovery are focussing on overarching themes - **Business, People and Place** with four cross-cutting priority ambitions:

- **Ultra-reliable digital connectivity** and a digital culture – underpinning recovery and growth across the whole economy
- **Skills** – retrain, re-skill, up-skill and ensuring that people have the right skills to do the jobs created.
- **Green economy** – low carbon and climate-resilient infrastructure, renewable energy and sustainable homes.
- **Fair and equal economy** and support for the Welsh language and culture

Figure 1 Strategic influences



Strategic context

The context for the plan includes wider social, economic and environmental issues facing rural Carmarthenshire including technology, climate emergency and decarbonisation, the ongoing impacts of COVID-19 and leaving the European Union (Brexit).

The strategic context also includes priorities of Carmarthenshire CC, the Swansea Bay City Region and the Welsh Government, along with the growing influence of the Well-being of Future Generations (Wales) Act and local Well-being Plans.

A key aim of the Act calls on public bodies to be more agile to ensure they are able to respond to ever-changing economic circumstances and to maximise new opportunities for growth. Sustainable development is applied throughout, as well as new ways of working ensuring that local authorities take account of the long term, prevent problems occurring or getting worse, take an integrated and collaborative approach and involving people.

The plan is also focused on securing a sustainable and prosperous future for the town that enables the Welsh language to thrive, through enabling entrepreneurship and small business growth in Welsh speaking regions.

Figure 2 Strategic influences



3 Llanybydder today

Llanybydder is a small market town located at the northern fringe of Carmarthenshire within the Teifi valley which serves a wide rural community on both sides of the river including Pencarreg, Llanllwni, Highmead and Alltyblaca.

The economy is primarily based around the agricultural sector and the towns major businesses are the Livestock Mart and its significant employer, Dunbia (meat processing).

Llanybydder is positioned on the A485 that connects the town with Carmarthen although its closest centre is Lampeter to the northeast (5 miles) which locally acts as the main employment, retail and service centre.

It is characterised by a small retail centre geared towards the local day to day shopping, trade and service needs of the rural community. Outside of the town, the locality supports a wide range of agricultural and land-based industries, engineers, construction and manufacturing. There are several examples of food and drink, and tourism together with professional and lifestyle businesses.

Llanybydder serves an important localised retail and service, social, employment and education role for the wider rural area including its surrounding settlements.

Figure 3 Location context



Socio-economic picture

The population of the Llanybydder hinterland is 7,430 and includes 2,800 living in the built-up area of the town. The proportion of people who spoke Welsh (59%) was above the average for rural Carmarthenshire (50%).

In comparison with rural Carmarthenshire - within the last ten years, the area has experienced:

- small population decline
- a growing older-aged population
- decline in the working-age population
- average economic activity and full-time employment
- lower than average household incomes
- lower-skilled local economy
- higher than average employment in agriculture
- higher than average levels of home working and self-employment
- above average house prices
- 6% decline in the ability to speak the Welsh language between 2001-2011

The data shows a large part of the local economy is dependent on part-time, low skilled and lower wage incomes.

Figure 4 Recent socio-economic trends

| | Population | Working-age | Gross household income | Median House prices | Economically active | Full-time employment |
|------------------|----------------|---------------|------------------------|---------------------|-----------------------|----------------------|
| Rural County | Increase 1.8% | Decline 3% | £28,622 | £135k | 66% | 33% |
| Llanybydder area | Decline 1.1% | Decline 4.3% | £25,600 | £154k-£180k | 67% | 32% |
| | Work from home | Self-employed | Largest occupation | No skills | Higher qualifications | Employed agriculture |
| Rural County | 7% | 14% | Skilled trades 19% | 25% | 30% | 6% |
| Llanybydder area | 10% | 18% | Skilled trades 27% | 30% | 28% | 11% |

Sources: ONS Census & NOMIS – Baseline study



Businesses & employment

The Llanybydder area is highly reliant on agriculture and a diverse range of business activities locally are linked to the sector. Residents are also reliant on Lampeter, Carmarthen and to a lesser extent Newcastle Emlyn for their employment.

Dunbia dominates the local economy with the meat processing facility employing some 600 staff and is also a significant employer for the region. The livestock mart also dominates the town and holds regular weekly and monthly sales that serve south-west Wales and is known to have increased activity following the closure of Cardigan mart. Llanybydder mart is also renowned for the regular horse fairs which is one of the biggest held in Europe.

There are over 55 identified businesses in the Llanybydder area, the majority in private local ownership across a variety of micro, small and medium-sized companies particularly workshop, storage, services and quasi retail /supplies businesses. A large number of businesses are scattered across the settlement and its outlying communities and includes the specialist and internationally renowned Jen Jones Quilts.

The largest employment sectors in Llanybydder:

- **15% wholesale and retail trade**
- **13% human health and social work**
- **11% agriculture**

The largest employment site in the town is occupied by Dunbia with other important employment locations at the Old Foundry site occupied by Cawdor Cars and various commercial uses at Station Terrace (including lorry garage and building & timber supplies). The livestock mart also occupies a large part of the town centre.

Located outside Llanybydder there is a large employment site to the south of Glan Dua (occupied by Foundry Commercials and storage for the National Eisteddfod of Wales) whilst the fully occupied Llanybydder Industrial Estate at Ty Mawr provides three units and is the only purpose-built employment estate in the area. In addition, various standalone premises are located along the B4337 and A485 (e.g. garage sites and agricultural/building supplies) together with established businesses at countryside locations close to Alltyblaca, Llanllwni and Glan-Dua.

The local commercial market is characterised by:

- **The dominance of light industrial, storage and quasi retail stock, much of which is of a secondary dated quality**
- **Localised levels of demand with high levels of occupancy**
- **Shortage of modern industrial premises and starter units**

The lack of an available supply of suitable sized employment premises is reported to be a major problem for local businesses in terms of helping them to expand (especially for unit sizes 2,000 – 4,000 sq. ft) together with suitable affordable premises for new business start-ups.

Town centre

The local retail offer and services are located around the traditional centre at Market Place/Bridge Street as well as the A485/B4337 crossroads.

The number of retail businesses has been in decline in recent years, but there are two convenience stores (Londis and Nisa) together with bakers and specialist deli. By contrast, the comparison offer is very limited but specialist including a kitchen supplier, car sales and farm supplies. There are also hairdressers, pharmacy and indoor children's play centre. The highly localised nature of the retail and service offer is unsurprising given the small scale of the centre and also the proximity to Lampeter.

There are several café/takeaway and public houses that serve the passing trade along the A485 together with market day trade. The evening economy offer is limited to the traditional pubs and takeaways, however, there is a more contemporary restaurant offer with accommodation located at The Cross Hands Hotel.

The centre also has an important community function including the local rugby clubhouse. Outside of the centre, there are important facilities at the Old School community centre and gym and Llanybydder family centre.

The mart and surrounding agricultural community is recognised as the mainstay for many of the town centre businesses including the agricultural supplies merchants, auctioneers/valuers/estate agents, garage/sales and NFU offices. There is also a small produce market (2-3 stalls) held to coincide with some market days. In addition, several professional services operate from small offices in Market Place and the Station Terrace area.

There are no bank facilities in the town except for an ATM at Nisa. The nearest banks are located in Lampeter and Carmarthen and visits from the Natwest mobile bank (30 minutes on a Tuesday).

Overall, the retail centre of Llanybydder appears to have lost many of its retail and service businesses and no longer provides the critical mass expected from a traditional town centre. The users and activity from the Mart appear to underpin many of the retail and service businesses that continue to trade from the centre.



Visitor economy

Llanybydder has a limited offer as a tourist destination although offers a base for visitors to the Teifi valley. It is famous for its horse-trading tradition through its monthly horse fairs which attract buyers from across Europe. This is unique to Llanybydder, especially the largest sales meets held in September and October. Jen Jones Welsh Quilts represents another business known for attracting international visitors.

There are modest levels of accommodation available with the Cross Hands Hotel (and until recently the Black Lion Hotel) offering guest accommodation together with several B&B establishments. Several self-catering cottages are available to rent locally along with camping and caravan site provision.

The natural attraction of the local area is considered to offer good potential to develop and grow its tourism appeal, driven by the growth in the staycation market and agri-tourism. The location on the A485 provides the opportunity to intercept and encourage visitors to stop in the town when heading to the coast and further inland.

The quality and isolated countryside location combined with the River Teifi represent key attributes for outdoor recreation activities, particularly walking and cycling (road and mountain biking) which offers an alternative holiday option to the more rugged Brecon Beacons to the east. Opportunities could also build on the rural crafts and artisan sector locally by offering visitor experiences and courses on traditional craft skills.

The cycling appeal of the area is promoted in Discover Carmarthenshire as part of the Big Wilderness Adventure and Teifi

River Tour which promotes Llanybydder as a stop-off location. Sustrans National Cycle route 82 also passes through the town.



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Brand and marketing

The level of marketing for the Llanybydder area is relatively limited and is primarily focused on several websites such as Llanybydder & Rhydcymerau Community Council which provides an overview of local history, events and council meetings. The county-wide Discover Carmarthenshire promotes the local area primarily as a cycling destination whilst Tripadvisor has very limited entries for Llanybydder.

The majority of social media presence is through local Facebook groups with a good number of active forums, including the Village Committee, Community Support, Rugby Club and Old School Community Centre and Gym. This is complemented by existing businesses marketing through website and Facebook presence.

The level of locally organised media presence, especially via Facebook, is well established although an enhanced online presence would help to greater promote the attributes of the area and its local businesses (for example; Jen Jones Welsh Quilts & Blankets appears in Trip Advisor as a destination in addition to a business in its own right). The scope exists to promote a modern branding and an updated profile of events, offer and community talent.

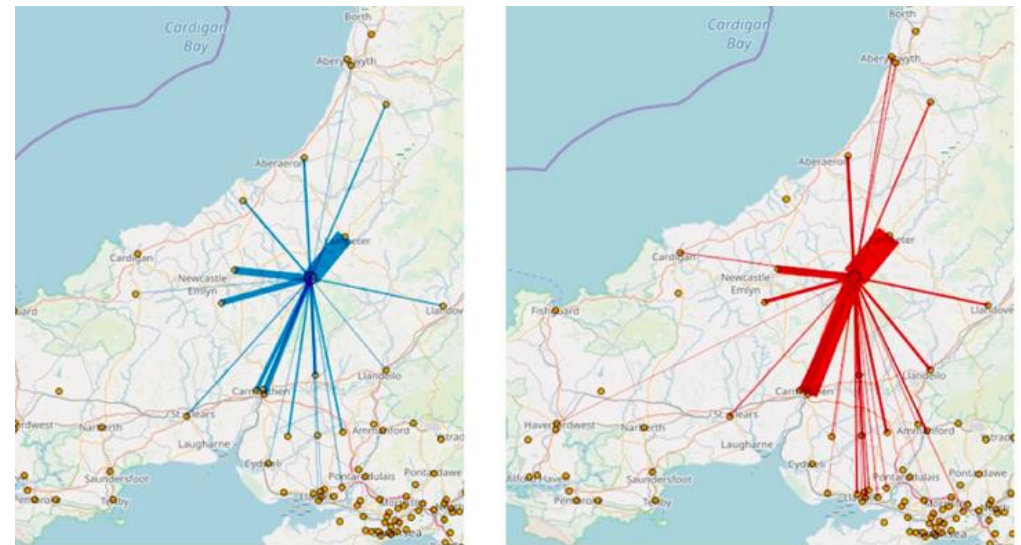
Transport and movement

The roads serving Llanybydder are largely a network of rural A and B and lower classification roads. Connections are largely fragmented travelling north to south and more direct travelling east to west. The main challenge is in providing sustainable integrated transport for the area.

Llanybydder has a very large visitor/shopper car park for the size of the centre at Station Terrace with plenty of on-street parking opportunities.

Travel to work patterns provides a picture of commuter behaviour and understanding of the number of people travelling from the town area to a place of work (shown red) or from another place into the town for work (shown blue). The figure indicates how Llanybydder is reliant on Carmarthen and Lampeter for employment.

Figure 5 Travel to Work Patterns



Sources: 2011 Census - DataShine: Commute

Broadband and digital connectivity

Whilst Llanybydder appears to have good connectivity, it is clear that there are significant areas in the wider hinterland with broadband speed difficulties including Aber Glar, Alltyblaca, Pencarreg, Rhyddlan and Ty Mawr. For example, slow speeds affecting the businesses have been reported by the occupiers of Llanybydder industrial estate.

A recent Ofcom survey found 489 (52%) out of a total of 936 premises in the Llanybydder postcode area have non-superfast broadband.

Planning, Development & Environment

There have been low levels of development activity (commercial and residential) in the area over recent years except for some small-scale residential development on infill sites and a reliance on local developers to bring forward housing.

The Revised Carmarthenshire LDP does not consider Llanybydder a focus for significant new development with the LDP planning a reduction in the number of new housing allocations. However, three sites totalling 63 units have been identified as well as a number of proposed housing sites at Llanllwni (for 16 units). The allocation of a range and choice of sites is considered essential for supporting the delivery of a mixed type and tenure for Llanybydder which has been largely absent over recent years.

Land is also allocated for new employment uses at the Old Foundry which represents the main opportunity for commercial development in Llanybydder. This area also provides scope for

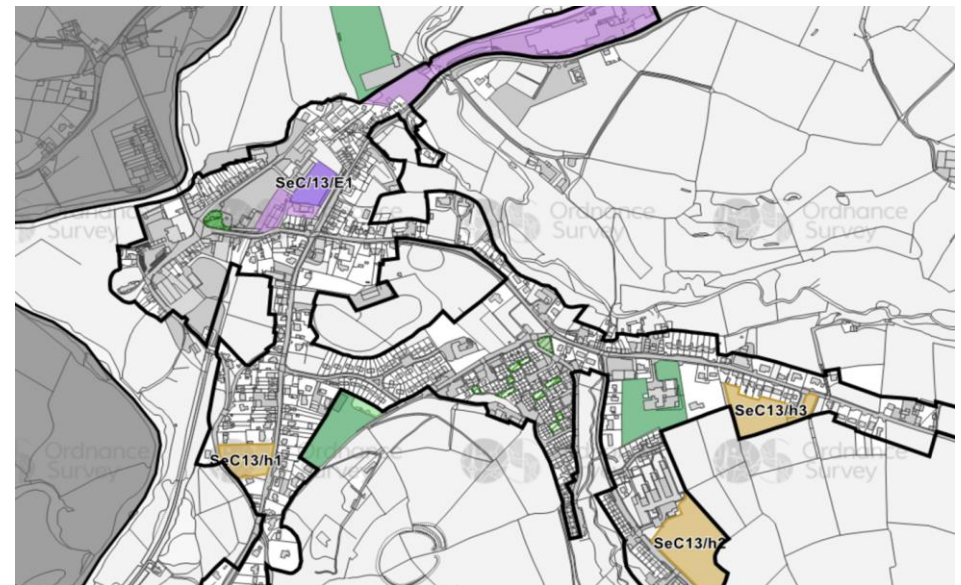
much wider site redevelopment with surplus land that provides opportunities for commercial and mixed use development.

Outside of the town, two locations with the potential to support the development of new employment include:

- Llanybydder Industrial Estate at Ty Mawr - concern has been expressed that policies that protect this employment site have also been removed in the current version deposit LDP
- Foundry Commercials site at Glan-Duar.

In terms of environmental constraints, the River Teifi has been the cause of flooding to parts of the low-lying town centre and is a restraint on the growth of the town to the east and north.

Figure 6 LDP Extract



4 Key Issues



Major shortage of modern employment units especially start-up and grow on space for local businesses to allow expansion and job creation



Priority need for enhanced digital connectivity and mobile reception especially in the outlying rural communities for home and business



Concern over the loss of local banking facilities



Promote and develop the area to attract and retain more visitors to build a tourism economy



Funding commitment and access to business support for the local enterprise including raising awareness of funding, and support for targeted at rural areas



Low delivery of new housing which impacts on affordable housing supply



Smarten-up and improve the appearance of the central area



Ensure a proactive and positive planning system to prioritise and support local planning proposals



Improved marketing and promotion of the local area and its businesses to overcome isolated location



Address flood risk problems in Llanybydder including the delivery of flood defences



Promotion of safe local walk and cycle routes in the local area, including the potential of the former railway line



Concerns for the agricultural sector generally & during Brexit transition given the town's dependency on the sector



Concerns over the lack of suitable and skilled employment opportunities for young people to help retain in the local area

5 Priority actions

Llanybydder is a small market 'town' located in a relatively isolated location which is heavily reliant on agriculture and related industries. Lampeter is some 5 miles away and provides the main retail, leisure and employment centre for the locality.

The strong relationship with the agricultural sector is reflected in the dominance of its main employer, Dunbia (meat processing and 600 employees) together with the town centre livestock mart and horse sales which acts as a major generator of town centre trade and visitors. Many local businesses, including those in and outside of the town centre, are directly or indirectly dependent on income generated through the food, farming, processing and distribution industries.

This dependency on agriculture is both a strength and weakness for the local economy. The impact of COVID-19 and the potential risks facing the sector from Brexit illustrate how vulnerable the town could be to future economic shocks. Whilst the local area is less reliant on retail, hospitality and leisure, all businesses will require ongoing support and guidance towards restart and recovery.

The primary focus of the Growth Plan is on the diversification of the local economy and a more resilient local business base beyond agriculture. Over the short to medium term, the aim is to identify and support opportunities for local maker, manufacturing and distribution businesses to grow. The main hurdle is the lack of new and grow on employment space to encourage expansion and new start-ups. There is also the need for a high-quality digital infrastructure (broadband and mobile) alongside enhanced

prospects for the delivery of new and affordable housing, which is essential for retaining younger people in the local area and addressing a low wage, low skill economy.

Strategic Priorities

- Employment floorspace - addressing the significant shortage of commercial workspace/units to support local expansion and start-ups
- Opportunity sites – identify and deliver commercial and potentially mixed uses, including residential at a number of prominent sites and within vacant property
- Tourist infrastructure – develop facilities to encourage more overnight stays in the area
- Digital infrastructure, including a SMART Town with reliable connectivity and data-driven growth, marketing and visitor strategies

Actions in support of the recovery and growth address the aforementioned three overarching themes - **Business, People and Place** with four cross-cutting priorities for creating ultra-reliable digital connectivity, improving skills to do the jobs created, low

carbon and green economy and a fair and equal economy that supports the Welsh language and culture.

1 – COVID-19 Recovery

The Covid-19 pandemic is the biggest public health and economic crisis in generations. It has had a dramatic effect on communities, the economy and how we live and work. It has reminded us that the strength of the places where we live, and work can at times be fragile.

The quality and accessibility of the town and countryside were hugely important for people's health and their well-being during the periods of lockdown. There has been a collective appreciation of the value of green spaces, walking and cycling routes and the local shops and amenities.

Among the many important challenges in the recovery period are the urgent actions to safeguard local business and employers and to determine which changes in behaviour that were introduced in response to the pandemic are emerging as permanent features of life and work. These have implications for the town because people are using places differently, travelling less and spending more time working from home. The recovery and growth plan must respond to these changes and contribute to a sustainable recovery, shaping the town around a vision for more economically resilient places.

The impact of the pandemic will continue to be felt for some time and the following actions can be taken in support of businesses and the town. There is an identified need to safeguard and create

jobs particularly in some of the hardest hit key sectors including retail, leisure and hospitality. In addition, the need to support businesses that are experiencing skills challenges as a result of the pandemic e.g. with digital and IT skills, marketing and diversification including developing new markets tendering where appropriate (linked to local procurement opportunities), efficiency measures etc.

2 - Supporting business growth

Where there is a lack of employment infrastructure to accommodate current or future needs, the resilience and sustainability of an area may be undermined, possibly contributing to decline. The lack of employment opportunities is also a key reason behind rural depopulation, particularly in the younger workforce. By supporting and encouraging the growth and expansion of locally grounded firms, particularly in more specialised industries, this will help to create long term higher paid employment, retain workers, broaden the skills base and help sustain local communities.

The foundational economy is the backbone of the rural economy and represents those parts of the economy that supports our everyday needs (social care, retail, tourism, food, drink, construction, energy etc). Similarly, local food and drink processing of agricultural and horticultural products is a growing industry. All of these types of businesses require similar business support and employment infrastructure such as good quality and affordable workspace with the best possible digital connectivity.

A) Investment in business premises to support new start-ups, business growth and expansion.

There are few suitable workspaces to support the growth of micro and small businesses. However, opportunities should be explored to create new business space either through new development sites, using surplus publicly owned buildings, acquiring vacant buildings, or establishing new shared workspaces.

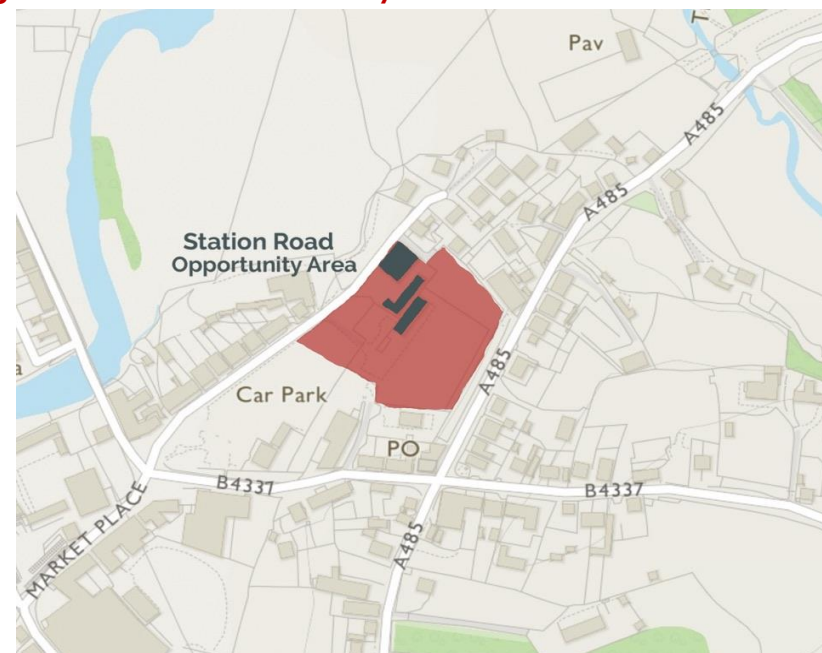
In rural areas where large scale developer interest is largely absent, the public sector also has an important role to play working with a range of smaller local developers and landowners to address the hurdles to development. These include addressing the viability gap between the cost of building and modernising new employment spaces and the rental income; and an important economic development role in guiding small developers through the planning process.

Opportunities include:

- Land at Old Foundry/Station Terrace - Located to the rear of the Station Terrace car park in the commercial core of Llanybydder, the brownfield site is allocated for employment use in the LDP. It forms part of a larger existing employment area known as the Old Foundry that includes the vehicle dealership and garage (Cawdor Cars). The site has remained underutilised for many years and is currently used for storage and sales purposes. Planning permission was granted in 2019 for a new industrial building which remains unimplemented.

The site is privately owned by a willing landowner and is located outside the flood zone. It offers a good development opportunity for commercial uses at a prominent central location, especially for small business units. Discussions with businesses in the area indicate a strong need for additional workspace to expand existing businesses. This reported demand combined with positive interest from willing landowners supports the potential for a more comprehensive development opportunity that could include adjoining business sites and the Station Terrace car park (County Council owned).

Figure 7 - Land at Old Foundry



- Land at Llanybydder Industrial Estate, Ty Mawr - In addition to protecting the existing employment site for future economic uses given its key contribution to the local economy, the Llanybydder Industrial Estate provides a dedicated small industrial estate of 3 units which is fully occupied. The potential exists to support the expansion of the established industrial estate on land to the south.
- Foundry Commercials – the site is positioned outside of Llanybydder and is the location of several businesses including Foundry Commercials and the storage and workshop for National Eisteddfod of Wales. There is sufficient space to build additional employment space within the boundary of the existing site and a willing landowner with an interest in developing new workshops/spaces.



Figure 8 - Land at Llanybydder Industrial Estate



Figure 9 – Foundry Commercials



B) Work hubs and Shared workspaces

Changes to working practices and the growing interest and ability to work closer to home and remotely from main offices may result in a higher demand to live in rural areas and opportunities to retain the working-age population. Actions that help provide flexible workspaces closer to home include:

- Feasibility study – a local study to investigate the specific level of demand and requirements from the local town and rural population.
- Investigate potential for a new public sector work hub created in rural towns to accommodate agile working across the county.

C) Re-use of vacant and underutilised buildings.

These provide opportunities for a range of enterprise and physical regeneration actions.

- Town centre property offers opportunities for 'pop-up' and trial-testing new customer-facing business ideas particularly for young people to become actively involved in the community and to develop entrepreneurial skills.
- New business premises – either re-using surplus public sector buildings or selectively acquiring key vacant buildings that have made a broader contribution to the physical and economic regeneration of the town.

There are a small number of vacant buildings present in the town centre which could offer potential whilst the community initiative to regenerate the Old School Hall provides an example of delivered flexible space.

D) Supporting business growth within grounded firms.

The growth of the local economy is linked with the success of the town's larger employers and in particular, locally grounded firms that have decision making rooted firmly in the community. Llanybydder is heavily reliant on the continued success and support for two key businesses, the Livestock Mart and Dunbia.

- **Key businesses** - The measures to support their growth include:
 - Engaging with leading employers to identify future investment opportunities and areas of future support
 - Help to support the up-skilling of the existing workforce and to train and re-skill future employees
 - Investigate opportunities for the local economy from within their respective supply chains.
- **Micro-businesses** - Identify and target support for the next phase of growth amongst small micro-enterprises, often family-owned firms and self-employed people within the community.

E) Promoting the use of Welsh in business.

Encouraging Welsh speaking and learning into a business can help to connect them to a wider range of people and opportunities as well as Welsh culture and heritage. Support is available through Helo Blod, which includes an officer covering West Carmarthenshire, working with Menter Iaith to enable businesses and organisations to introduce small amounts of Welsh into their business through translation and text checking service.

F) Agriculture and food production

Much of the area's agriculture is in the dairy sector, and at present, Carmarthenshire has no direct milk processing facility; in view of this, the Rural Task Force have suggested that a micro/macro milk processing facility based on a cooperative model be investigated. It is also supportive of small and medium-sized food based business and the establishment of production units to support added value food products, which could include artisan cheeses, ice creams and other dairy products capable of commanding a premium based on local provenance.

The aim is to support initiatives that create higher value and more productive businesses by increasing the productivity, diversity and efficiency of farming. Proposals in the plan for new modern workspaces, digital infrastructure and marketing and promotion seek to support and contribute towards this aim.

3 - SMART digital town and countryside

Digital technology has played a significant role in enabling businesses and communities to adapt during the COVID 19 pandemic. Carmarthenshire CC is currently working with both UK and Welsh Government to support businesses, employees and communities to take advantage of all the benefits associated with faster and more reliable internet connections and to develop wi-fi digital applications to promote rural market towns e.g. 'push notifications' to members of the public visiting towns.

Actions include:

- Ensuring gigabit-capable connectivity is available to the whole community and ensuring all rural residents and small businesses with less than 100mbps are able to benefit from government broadband upgrade initiatives e.g. Broadband Upgrade Fund. This involves aggregating the demand and uses local needs information to broker improvements with telecom providers.
- The SMART town combines the deployment of a Town Wi-Fi solution with the regular analysis of the data collected so that it is shared with businesses to support customer and marketing insights. Such analytics include visitor trends such as: footfall; dwell time; busiest days of week etc; measure success of event to justify future investment; can be used to attract new business.
- The Internet of Things and LoRaWAN technology is a new innovation network that supports business and community innovation. The technology forms part of developing the right combination of connectivity infrastructure, awareness, skills and support to enable businesses and residents to thrive and take full advantage of the digital revolution.
- Digital training - digital technology is only as good as the skills and confidence that exist to use it. Local training will be essential in order to upskill, share information and encourage the use of technology across the market town.

4 - Town centre and visitor economy

A) Station Terrace Car Park – Aire Camping Car Park

Llanybydder's position on one of the east/west route for travellers heading towards west Wales and the coast means that it is a natural stopping off point for visitors for the use of local facilities and refreshments. A key objective of the plan is to encourage travellers to use the town more often and also as a base for exploring the wider Teifi valley. The concept of the 'Aire' follows the French model of providing approved motorhome parking areas close to villages and towns to encourage people to visit the area.

Figure 10 Aire Camping



Llanybydder's town centre car park is in an ideal location with close proximity to local shops and amenities. The idea is to create a site that becomes well known and popular for the growing number of motorhome and campervan travellers passing through mid and west Wales.

B) Banking

There are no banks left in the Teifi valley between Cardigan, Carmarthen and Lampeter, and the loss of banks in Llanybydder, and the restricted availability of the in-store ATM has directly impacted on many local businesses and residents. There have also been knock-on effects for users of the market and visitors to the area in need of cash. The mobile Natwest bank also visits on a Tuesday – one of the quietest days and when the Mart is regularly closed.

Working with other towns in the Teifi valley including Newcastle Emlyn, a pilot scheme for reintroducing a more comprehensive banking facility and free ATMs is proposed. Support would be required to engage with the banking industry to positively lobby for a new model and pilot scheme for more extensive rural banking services.

C) Cycle tourism

Cycling is a key priority for Carmarthenshire's visitor economy with the local area supporting a network of published rides and National Cycle Network. Opportunities exist to develop the attraction of the area to road cyclists together with the potential of supporting mountain bike visitors to the Brechfa Forest. The proposal is to support businesses and projects that enhance

promote and service Llanybydder as a cycling destination and encourage more accommodation providers to obtain 'Cyclist Welcome' place to stay accreditation.

Prioritising walking and cycling and supporting the implementation of the Active Travel Act will help create a more comprehensive network of routes that connect places that people need to get to for everyday journeys and for travelling to work.

5 – Progressive procurement

The public sector in Carmarthenshire spends hundreds of millions per annum on goods, works and services, providing businesses of all sectors and sizes with a range of commercial opportunities.

The County Council and wider public sector recognise the significance of their spending power and look to purchase as much of this as possible from within the County. More can be done to support local procurement with opportunities to:

- encourage local businesses to access advice and guidance on local procurement opportunities.
- promote opportunities, particularly to small and new businesses, for lower value public sector contracts which may traditionally not have been attractive to smaller suppliers.

6 - Community energy schemes

Local resilience is a key aim of the Ten Towns initiative and thus a core element is to support the development of community energy plans for the respective towns which will ultimately provide a source of income for local communities and local businesses as well as help to address fuel poverty in rural areas. This Plan outlines the potential to embrace the opportunities linked to renewable energy which is well established in the County particularly in terms of its direct benefits for local communities and supporting greater environmental resilience.

To help achieve this, Ynni Sir Gar (Carmarthenshire Energy) will support business and other organisations communities to identify and scope potential sites for community energy generation. The host sites will benefit from a reduction in their energy costs.

7 - Circular Economy

A circular economy is where waste is avoided and the resources we use are kept in use for as long as possible. By supporting and promoting the circular economy amongst local businesses and enterprises, this seeks to retain and maximise resources through re-use, repair, remanufacture and refurbishment. Together this offers opportunities to support jobs, develop new skills and embrace sustainability and resource efficiency to protect the environment.

The Plan seeks to support opportunities for business owners, entrepreneurs and volunteers with ideas to help develop the circular economy in the town and across Carmarthenshire.

8 - Affordable homes

Thriving, resilient and sustainable rural towns require a mix of new housing as well as employment opportunities if retaining and attracting a working-age population is to be achieved. The dynamics of the rural housing market includes several factors, not only house price, but other issues such as relative affordability, inward migration, travel-to-work patterns, population projections and new dwelling completions rates etc. Overall, there is the need for smaller, less expensive homes for young and newly forming households - whether at market price, intermediate or affordable rent.

Rural areas like Llanybydder have experienced relatively low levels of developer interest in recent years. At the same times affordability issues have grown as house prices exceed the rural average along with lower than average household incomes. The lack of delivery has resulted in an overall reduction in the number of planned homes. Through a series of actions, the opportunity exists for the public sector, landowners and smaller local developers to work together to bring forward the planned new growth in accordance with the Local Development Plan and building a sustainable economy.

6 Delivery Plan

The delivery plan provides an indication of timescales, 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 development of key projects.

- Short term – immediate and next 12 months
- Medium term - 2 or 3 years
- Long term – 5 years and beyond

It is recommended that a series of early, 'quick win' projects are identified and initiated in order to demonstrate action and gain business and community buy in. These will typically be projects that can be funded from existing revenue streams or of low capital outlay. Where more complex but high priority projects are identified, early development of outline business case and design development should be prioritised.

Funding and resource streams often vary from year to year and those available at the time of preparing this plan are set out in in the following tables. Following the UK's departure from the EU there will be significant changes to the funding landscape existing programmes that are underpinning existing activity such as the European Regional Development Fund (LEADER) will

eventually be replaced at a UK level and directed through Welsh and local government. At the time of writing there is no certainty as to how this will be done. In light of this, the plan will need to be responsive over the coming 12-24 months and aligned to emerging sources of finance.

| ACTION | TIMEFRAME | KEY STAKEHOLDER/DELIVERY PARTNER | POTENTIAL FUNDING & RESOURCES | NEXT STEPS |
|--|-----------------------------|---|--|--|
| <p>4 – VISIROT AND TOWN CENTRE ECONOMY</p> <ul style="list-style-type: none"> • Aire Camping • Banking facilities • Cycle tourism | Short, Medium and Long Term | <p>Discover Carmarthenshire, Carmarthenshire CC</p> <p>Carmarthenshire CC, Local business community, Banking industry</p> | <p>LEADER Seed funding</p> <p>Cycling Friendly Infrastructure Funds</p> <p>Carmarthenshire CC Business Grant Funds</p> | <p>Explore feasibility of developing aire camping site with Discover Carmarthenshire and Carmarthenshire County Council</p> <p>Investigate opportunities for a pilot scheme with the banking industry to improve access to banking facilities (potential to link with other towns)</p> <p>Develop and promote cycling and events with Discover Carmarthenshire, including opportunities for local business</p> |
| <p>5 – PROGRESSIVE PROCUREMENT</p> <ul style="list-style-type: none"> • Low Value Contracts | Short, Medium and Long Term | Carmarthenshire CC | <p>Carmarthenshire CC Business Grant Funds</p> <p>Carmarthenshire CC Progressive Procurement initiatives</p> | <p>Actions in response to the recommendations following the advancing progressive procurement study</p> |

| ACTION | TIMEFRAME | KEY STAKEHOLDER/DELIVERY PARTNER | POTENTIAL FUNDING & RESOURCES | NEXT STEPS |
|-------------------------------------|-----------------------------|-----------------------------------|--|---|
| 6 – COMMUNITY ENERGY SCHEMES | Short term | Business and Ynni Sir Gar | LEADER/ Ynni Sir Gâr | Ynni Sir Gâr have LEADER funding until March 2022 for developing community renewable energy projects and they are looking for business and other organisations to take this forward |
| 7 - CIRCULAR ECONOMY | Short and Medium Term | Businesses and Carmarthenshire CC | LEADER Seed Funding and Circular economy initiative | Circular Economy feasibility study recommendations |
| 8 – AFFORDABLE HOMES | Short, Medium and Long term | Carmarthenshire CC/developers | Developer contributions and Carmarthenshire CC and Cartrefi Croeso | Secure new affordable homes via the review of the LDP policy and direct delivery via developers and Cartrefi Croeso and housing associations |

Table 2: Funding & Resources

MARKET TOWNS OFFICER SUPPORT

Funding has been secured via the RDP Leader programme to recruit 2 x Market Town Officers who will work with the 10 Towns to take forward actions identified within the economic growth plans. These posts will be the key link between the towns and the various directorates across the Authority.

LEADER SEED FUNDING

£10k revenue to assist the towns to support and develop recommendations emerging from the growths plan. Examples of activities eligible for support (*not exhaustive*) might include premises costs, tourism and events, training, marketing, specialist advice and COVID-19 recovery measures.

DIGITAL/SMART TOWNS

A range of initiatives to support businesses and communities to obtain faster and more reliable connectivity and application of digital SMART towns.

- Wi-fi towns - funding to secure free wi-fi for pilot towns and roll out to all Ten Towns for period of 2 years. The aim is to collect data that provides visitor trends such as: footfall; dwell time; busiest days of week etc; measure success of event to justify future investment; can be used to attract new business. Officer time is also available to work with the towns to analyse the data and to ensure that local businesses receive this information and to develop regular newsletter providing information on the towns; local business offers, events etc
- Internet of Things – initiatives to explore and develop the use of IOT and LoRaWAN technology as a way of supporting the Ten Towns. Funding secured to purchase IOT gateways. Further funding ringfenced for the purchase of sensors and deployment once ideas have been identified.
- Digital training - To facilitate a series of virtual training events in order to upskill, share information and encourage the use of technology across market towns.
- Digital Connectivity - The Authority is currently working with both UK and Welsh Government to promote the Broadband Upgrade Fund to help businesses, employees and communities take advantage of all the benefits associated with faster and more reliable internet connections.

CARMARTHENSHIRE CC BUSINESS RECOVERY & 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

TEN TOWNS CAPITAL FUNDING

Carmarthenshire CC are currently considering a new capital fund to assist with delivery of initiatives and future funding bids for projects identified in the Growth Plans.

LOCAL MARKETING/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 which keep things in use longer, through re-use, repair, remanufacture and refurbishment, and in doing so, helping regenerate the community by adding jobs and developing skills locally. By doing 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.

COMMUNITY ENERGY SCHEMES

Development of community energy plans for the respective towns which could potentially provide revenue generating opportunities for the towns.

Carmarthenshire Energy Limited have been commissioned to identify and scope potential sites across the Ten Towns working closely with Energy Services Wales that could be further developed into community energy projects.