



Powys Replacement Local Development Plan (RLDP)

Appendix A: Review of retail and town
centre hierarchy, health and boundaries

Prepared for Powys County Council

May 2023

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Introduction

Health checks have been undertaken for the fourteen defined retail centres in Powys to inform the assessment of the hierarchy as well as the defined town centre boundaries. The following assessments have utilised the results from the Local Data Company town centre surveys as well as new data collected from additional survey and site visits.

There are differences between the survey methods undertaken in 2012 and 2022 that may explain some changes over the period, and these have been highlighted. Where data gaps have been identified in the Local Data Company survey data these have also been identified in the health checks. The range of indicators used has had regard to the list of possible measures set out in TAN4 and includes:

- Diversity of uses – business type and category;
- Retailer representation and change – independents, multiples and store openings and closures;
- Vacancies, including long term vacancies;
- Accessibility;
- Consideration of environmental quality;

The study has not undertaken a local needs assessment of the town centres and the commentary within the health checks refers to provision within the centres only, based on the adopted LDP definition and updating the previous NLP studies. The health checks do not comment in detail on out of centre retail provision.

County Level Health Check

Figure 1: Powys and Wales average town centre uses

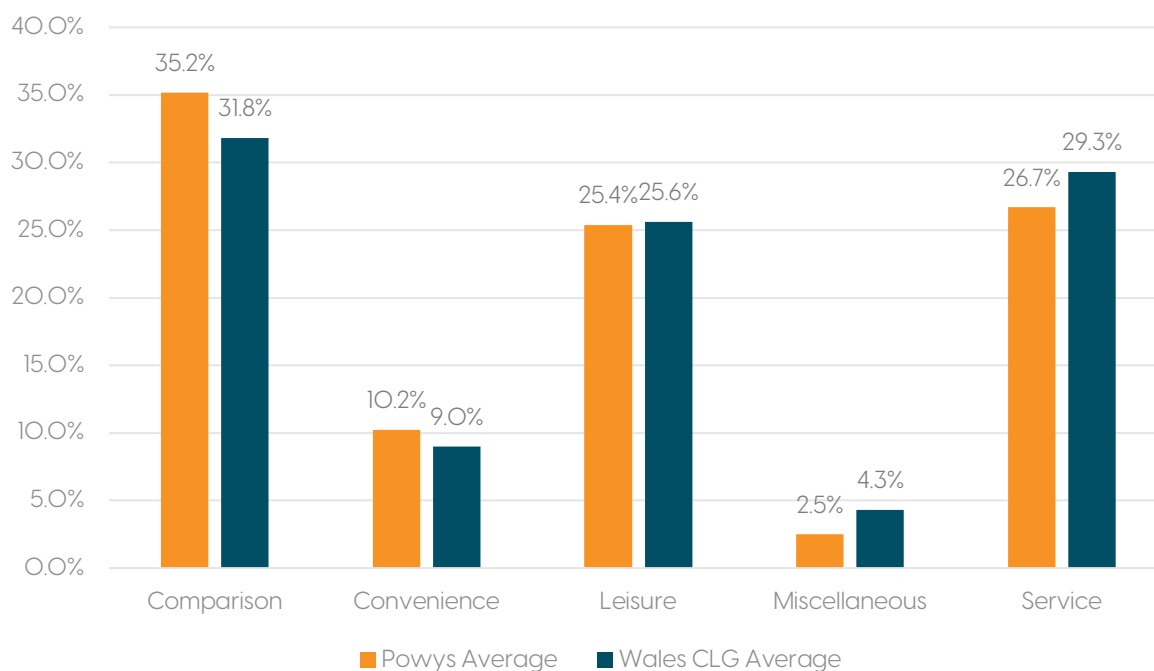


Figure 1 shows the proportion of business types in Powys town centres are broadly in line with the national average with 3% more comparison retailers and 2% fewer service businesses being the main variances from the national average. There is a 1% difference between the proportion of convenience, leisure and miscellaneous businesses in Powys compared with the national average.

Figure 2, below, shows that larger town centres tend to have a higher proportion of comparison retailers than smaller centres, whilst smaller centres tend to have a higher proportion of convenience businesses reflecting their importance for ‘top up’ and local shopping.

There is significant variance between town centres in the proportion of leisure businesses which range from 50% occupied units in Llanwrtyd Wells and Montgomery to 15% in Llandrindod Wells. There is also significant variation in the proportion of service businesses which range from 8% to 43%.

Figure 2: Town centres by proportion of business types (excluding vacancy)

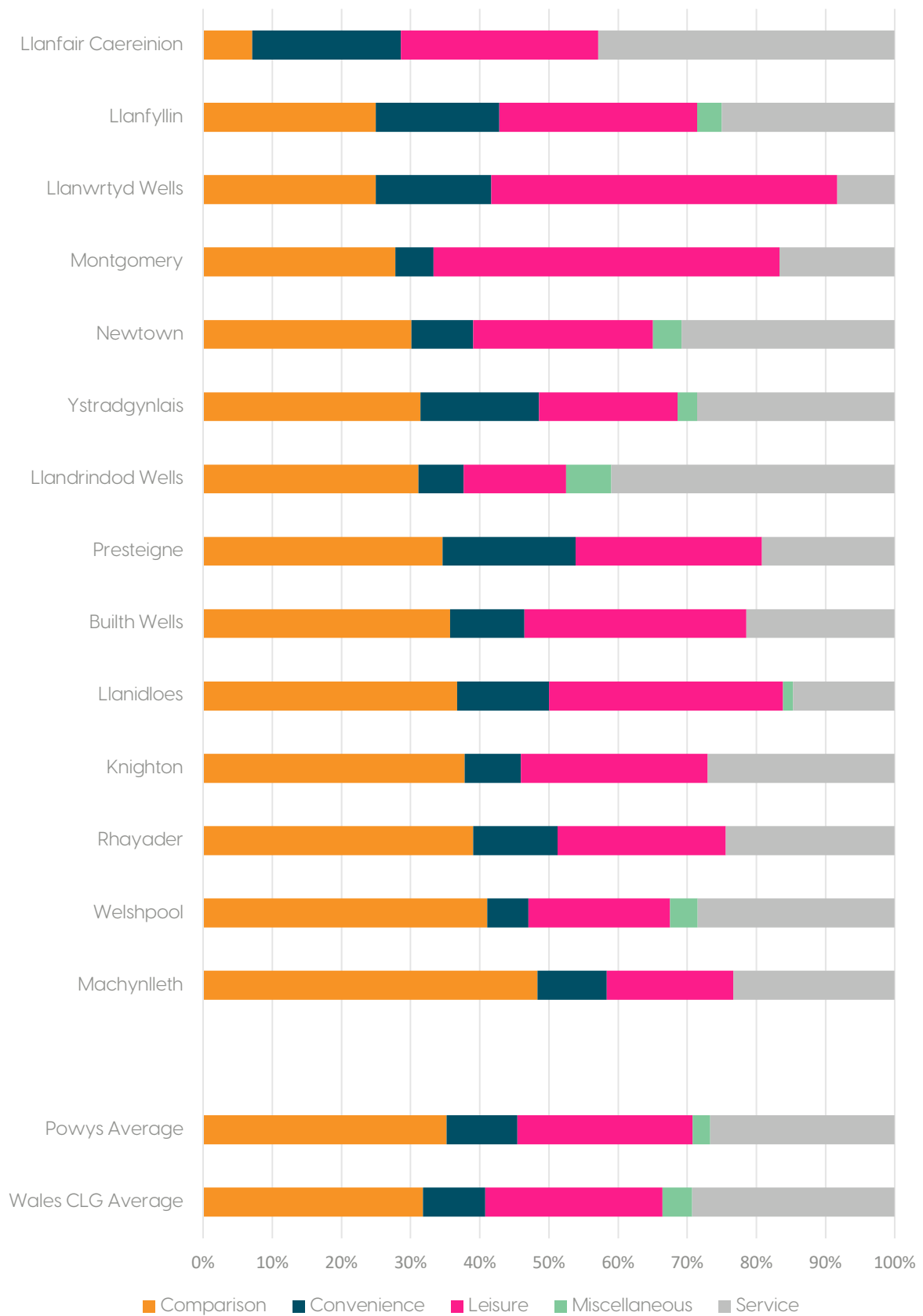


Figure 3: Vacancy rate by town centre, Powys and Wales average

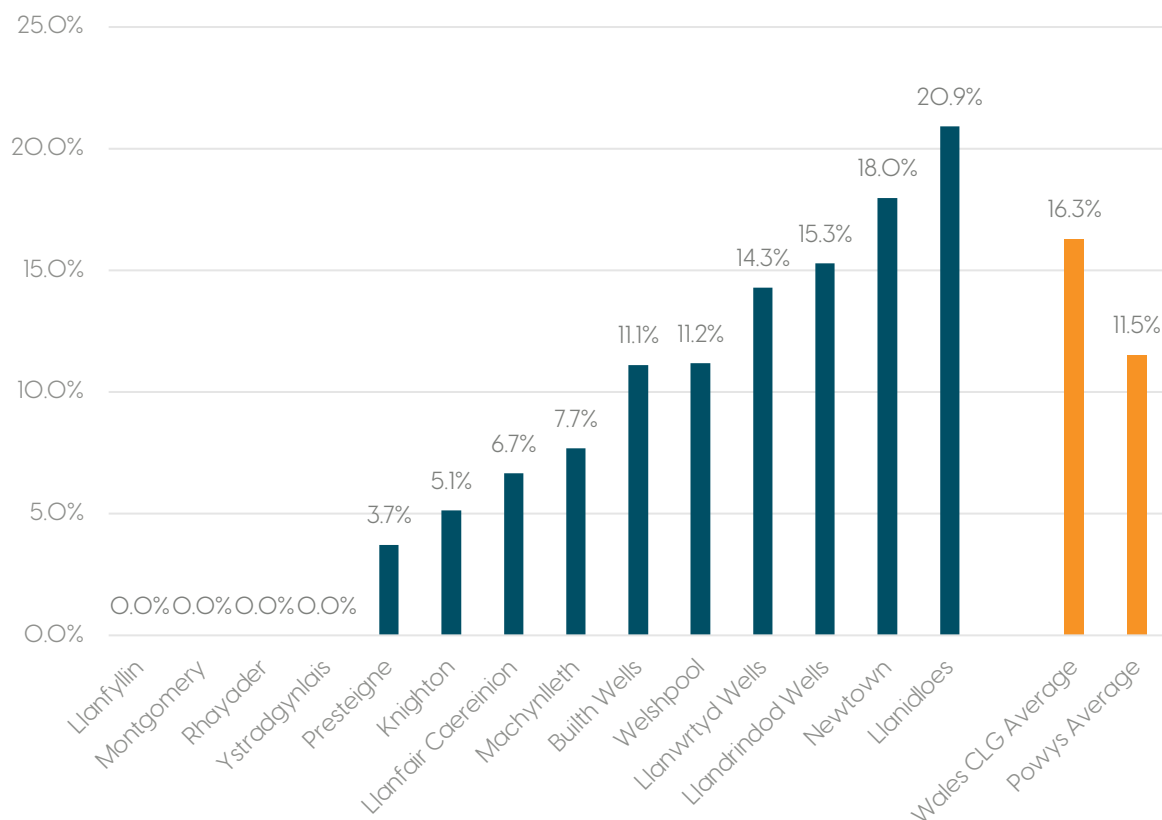


Figure 3 shows that the majority of town centres in Powys had a lower vacancy rate than the national average, with only Newtown and Llanidloes recording vacancy rates above the 16% national average, 18% and 21% respectively. The size of a town centre is loosely correlated with vacancy rates, with the smallest town centres recording the lowest vacancy rates.

Powys has a far higher proportion of independent businesses than the Wales average across all town centres with Figure 4 showing a difference of 47% between the Powys average of 80% and national average of 33%.

Smaller town centres have the highest proportion of independent businesses. In town centres of 65 units or less, convenience stores and professional and financial services (e.g. estate or insurance agents) account for the majority of multiple businesses.

Figure 4: Proportion of independent businesses by town centre, Powys and Wales average

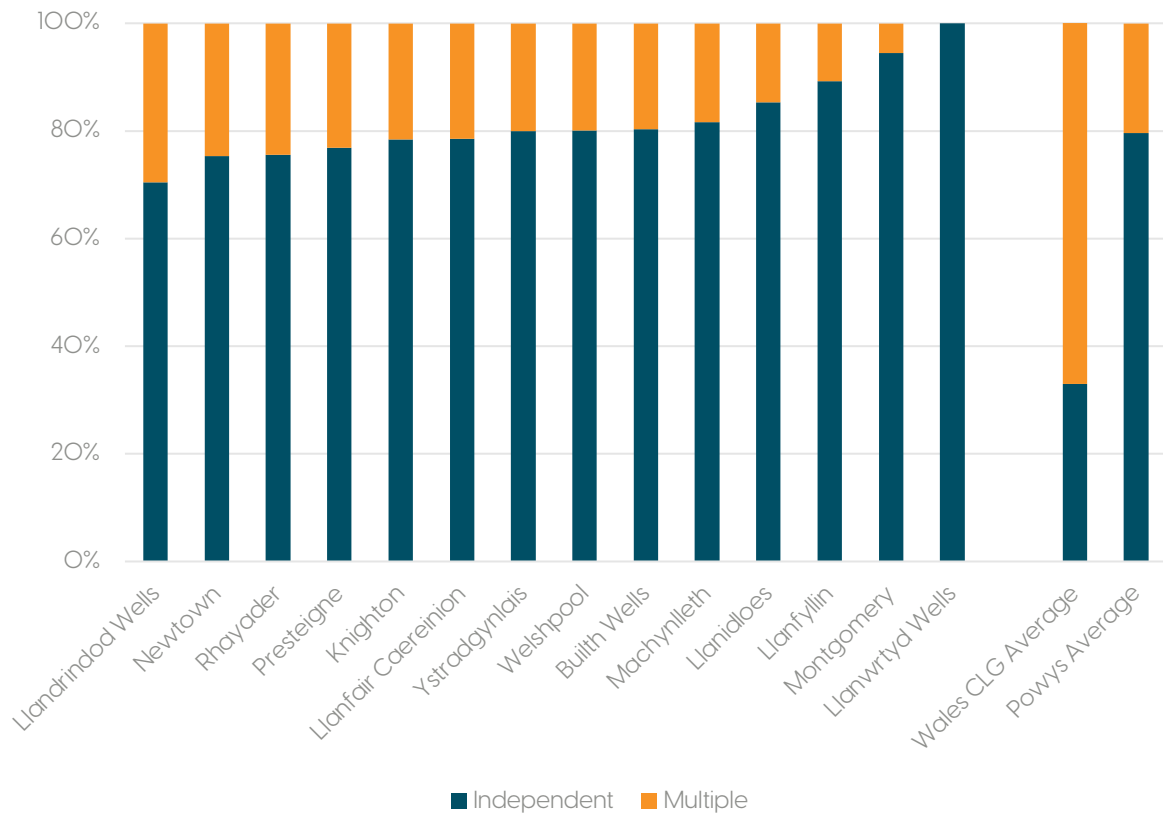


Figure 5: Business survival rate across select town centres and the national average

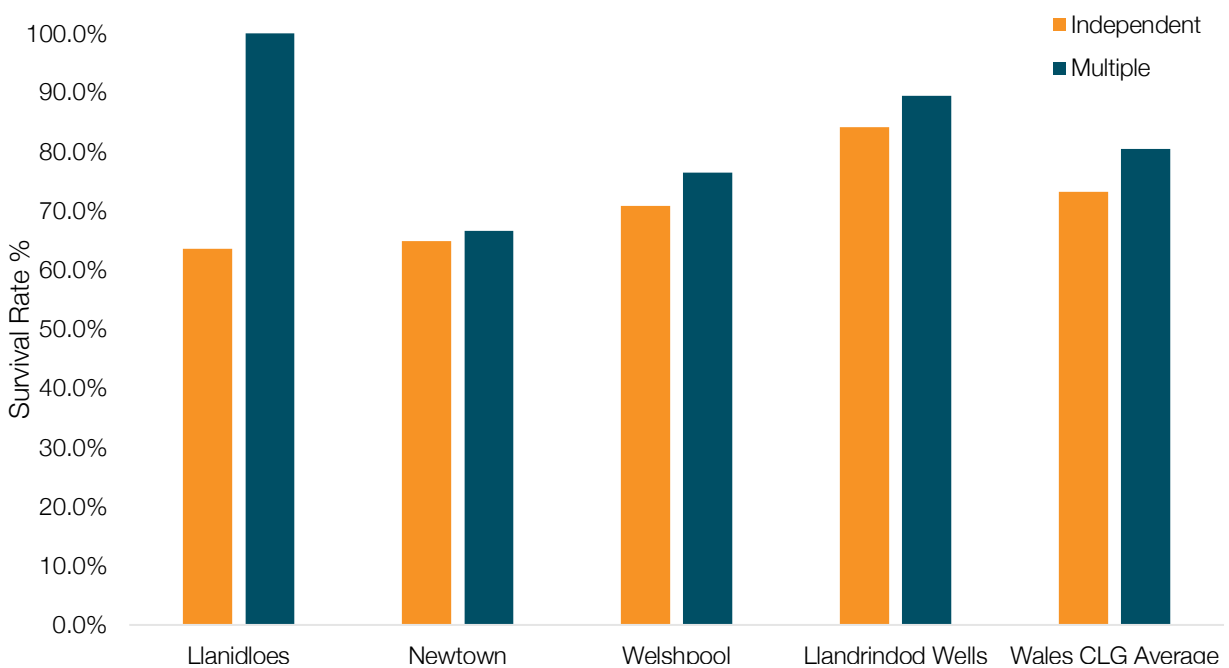


Figure 5, above, shows the proportion of businesses which were open in January 2020 and remained open in October 2022 – the national average of businesses surviving this period was 75.8%.

Across Powys town centres where data is available for business survival rates (Llanidloes, Newtown, Welshpool and Llandrindod Wells) multiple businesses had a higher survival rate than independent businesses.

Newtown, which had the lowest survival rate of the Powys town centres, saw particularly low survival rates in comparison retail. In contrast, the highest survival rate was seen in Llandrindod Wells with 85.7% of businesses surviving the period, 10% higher than the national average.

Llandrindod Wells Health Check

Llandrindod Wells is classified as an 'Area Retail Centre' in the adopted Powys LDP. Located between Builth Wells and Rhayader, Llandrindod Wells serves the catchment of mid Powys. The town centre has a variety of retail and service uses. The key roles of Llandrindod Wells include:

- Convenience shopping: there are two supermarkets (Bargain Buys and Aldi) supported by a Spar convenience store and a range of smaller units including newsagents, bakers, and health food store.
- Comparison shopping offers a good range of independent retailers with a handful of national retailers. The national retailers include Boots, Bon Marche, Greggs, Oxfam and the British Red Cross.
- Services: provides a range of services including a post-office, high-street banks, cafe's, restaurants, takeaway, hairdressers, and estate agents.
- Entertainment: includes a social club and a number of hotels/ bars.
- Community facilities provide a few community services including a dentist and tourist information centre.
- Key transport infrastructure includes a railway station on the Heart Wales railway linking Shrewsbury with Llanelli/Swansea, and adjacent bus interchange.

In addition to the town centre, there's a Tesco supermarket located outside the centre on Waterloo Road and three small parades of shops located a short distance from the centre at High Street, Park Crescent, and Temple Street.

Mix of Uses and Occupier Representation

Llandrindod Wells has a total of 68 retail/service uses (excluding miscellaneous non-retail Class A uses) which is slightly above the level recorded in 2012. The centre has a higher proportion of occupied comparison, convenience, and service units than the Welsh average. However, leisure is the only category that is below national average in terms of percentage of units.

Table 1: Llandrindod Wells use by unit

Type of business	Number of business units	% of total business units
Comparison	19	26.4%
Convenience	4	5.6%
Leisure	9	12.5%

Miscellaneous	4	5.6%
Service	25	34.7%
Vacant	11	15.3%

Table 2: Llandrindod Wells by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales CLG Average
Comparison	31.1%	29.3%
Convenience	6.6%	4.3%
Leisure	14.8%	25.6%
Miscellaneous	6.6%	9.0%
Service	41.0%	31.8%

Representation Comparison

Compared to the Powys average, Llandrindod Wells town centre has a lower level of comparison shops (31%). In total eight categories are not represented in the centre including – car showroom, department store, electrical, and fashion. The centre provides a significantly higher proportion of charity/second hand and furniture/carpets/kitchen stores than the Powys average. The only other categories which is noticeably higher than the Powys average is sports, toy and cycle shops.

Table 3: Llandrindod Wells breakdown of comparison units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Comparison	19	31.1%	35.4%
Books, Arts & Crafts, Stationery, Printers	1	1.6%	5.1%
Car & Motorbike Showrooms	0	0.0%	0.8%
Charity & Second-hand Shops	5	8.2%	4.5%
Chemists, Toiletries & Health	2	3.3%	3.0%
Department Stores & Mail Order	0	0.0%	0.3%
Discount & Surplus Stores	0	0.0%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	1	1.6%	1.3%
Electrical Goods & Home Entertainment	0	0.0%	3.2%
Fashion & General Clothing	0	0.0%	3.6%
Florists & Garden	0	0.0%	1.1%
Footwear	0	0.0%	0.8%

Furniture, Carpets, Textiles, Bathrooms & Kitchens	5	8.2%	3.9%
Gifts, China & Leather Goods	2	3.3%	4.0%
Jewellers, Clocks & Watches	1	1.6%	0.7%
Pet Shops & Pet Supplies	0	0.0%	0.9%
Sports, Toys, Cycle Shops & Hobbies	2	3.3%	1.5%

Representation Convenience

Compared to the Powys average, Llandrindod Wells town centre has a smaller proportion of convenience shops (10%). The convenience categories that are not represented in the centre include butchers, off licences and petrol filling stations. The centre provides a marginally higher proportion of bakers, and confectionary than the Powys average.

Table 4: Llandrindod Wells breakdown of convenience units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Convenience	4	6.6%	10.1%
Bakers	1	1.6%	1.5%
Butchers & Fishmongers	0	0.0%	2.0%
Confectionery, Tobacco, Newsagents	1	1.6%	1.5%
Groceries, Supermarkets & Food Shops	2	3.3%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	0	0.0%	0.3%

Representation Leisure

Compared to the Powys average, Llandrindod Wells town centre has a significantly lower proportion of leisure units (15%). The centres hospitality offer is also lower including the proportion of bars, pubs and clubs and cafes.

Table 5: Llandrindod Wells breakdown of leisure units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Leisure	9	14.8%	25.0%
Accommodation	1	1.6%	2.6%
Bars, Pubs & Clubs	1	1.6%	6.6%
Cafes & Fast Food	3	4.9%	10.3%

Entertainment	2	3.3%	1.9%
Restaurants	2	3.3%	3.6%

Representation Services

Compared to the Powys average, Llandrindod Wells centre has a significantly higher proportion of services (41%). Of all the categories represented the centre is noticeably above average for auto services (garages), banks and financial services, estate agents and auctioneers and health and beauty.

Table 6: Llandrindod Wells breakdown of service units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Service	25	41.0%	27.0%
Auto & Accessories	0	0.0%	0.3%
Auto Services	1	1.6%	0.4%
Banks, Financial Services & Building Societies	4	6.6%	3.2%
Employment & Post Offices	1	1.6%	1.6%
Estate Agents & Auctioneers	5	8.2%	4.2%
Hairdressing, Health & Beauty	12	19.7%	13.1%
Household & Home	0	0.0%	0.3%
Launderettes, Dry Cleaners & Other	0	0.0%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	0	0.0%	0.3%
Miscellaneous	4	6.6%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	0	0.0%	0.4%

Representation Largest All Categories & Independent/Multiple

Across all categories, the largest number of business units are in service uses with "Hairdressing, health and beauty" being the largest overall category.

Table 7: Llandrindod Wells top five business categories (does not include vacant units)

Category of business	Number of businesses	Proportion of town centre units
Hairdressing, Health & Beauty	12	19.7%

Charity & Second-hand Shops	5	8.2%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	5	8.2%
Estate Agents & Auctioneers	5	8.2%
Transport	4	6.6%

A breakdown on independent and multiple businesses shows Llandrindod Wells is identical to the Powys average and significantly more independent than the Wales average.

Table 8: Llandrindod Wells independent & multiple business units

	Number of businesses	Proportion of businesses	Powys average	Wales CLG Average
Independent	11	79%	79%	67%
Multiple	3	21%	21%	33%

Vacancy

There were 11 vacant retail units within Llandrindod Wells town centre at the time of the survey which is higher than in 2012 and resulting in a vacancy rate higher than the Powys average and marginally below the Welsh average. The vacant units are distributed across the centre and along Middleton Street, South Crescent and Tudor Lane. Data from 2020 shows that vacancy rates have grown in recent years by 1.6%. with the largest proportion of store closures in the comparison and services sectors.

Table 9: Llandrindod Wells vacancy

Type of unit	Number of business units	% of business units	Wales CLG Average	Powys average
Occupied	61	85%	84%	89%
Vacant	11	15%	16%	11%
Total	72			

Environmental Quality & Character

The town centre is a Conservation Area with a high quality and attractive Victorian spa town character. The broad open streets with wide pavements provide a high-quality public realm surrounded by substantial and attractive buildings and nearby open spaces. The traditional commercial area is concentrated along Middleton Street and Station Crescent, however there is a slightly disjointed feel with larger

stores (Aldi and Bargain Buys) located towards the edge of the centre. In addition, within a short walking distance of the centre there are shops and services located at High Street, and Park Crescent. Despite their segregation from the centre by the railway line they remain connected with the shopping centre.

Summary of Llandrindod Wells' Strengths and Weaknesses

Llandrindod Wells provides a range and choice of mainly independent businesses, with only a handful of national retailers. In comparison to Powys and nearby centres such as Builth Wells, the proportion of comparison, convenience and leisure uses in Llandrindod Wells is much lower with the data suggesting the main role is providing services complementary to its main shopping role. The lack of quality and range of choice of shopping, leisure and entertainment facilities in comparison to other Area Retail Centres is a concern.

The recent growth and rate of vacant units suggests that the demand for premises has weakened although remaining about average compared with the Wales-wide figure. Food and grocery provision in the centre is suitable for top up and main food shopping which helps to sustain the centres importance as an Area Retail Centre serving mid Powys, although the centre does not offer the same quality and range of facilities available in larger centres. Despite these weaknesses the centre clearly provides a wider services role reflecting the towns importance regionally.

- The number of units located in the town centre has grown slightly over the last ten years (68)
- Higher levels of occupation in service units than the Welsh average
- The centre provides a significantly higher proportion of sport/toy/cycle retail than the Powys average.
- The centre provides a marginally higher proportion of bakers and confectionary than the Powys average.
- Significantly higher proportion of services including auto services (garages), banks and financial services, estate agents and auctioneers and health and beauty.
- The centre has a good provision of public transport and car parking for shoppers.
- lower proportion of leisure (15%) compared with Powys.
- An average number of independent shops in comparison to Powys and is significantly more independent than the Wales average.
- Vacancy rate higher than the Powys average and comparable with the Welsh average in terms of proportion of units
- High environmental quality reflecting its Victorian and Edwardian spa resort heritage.

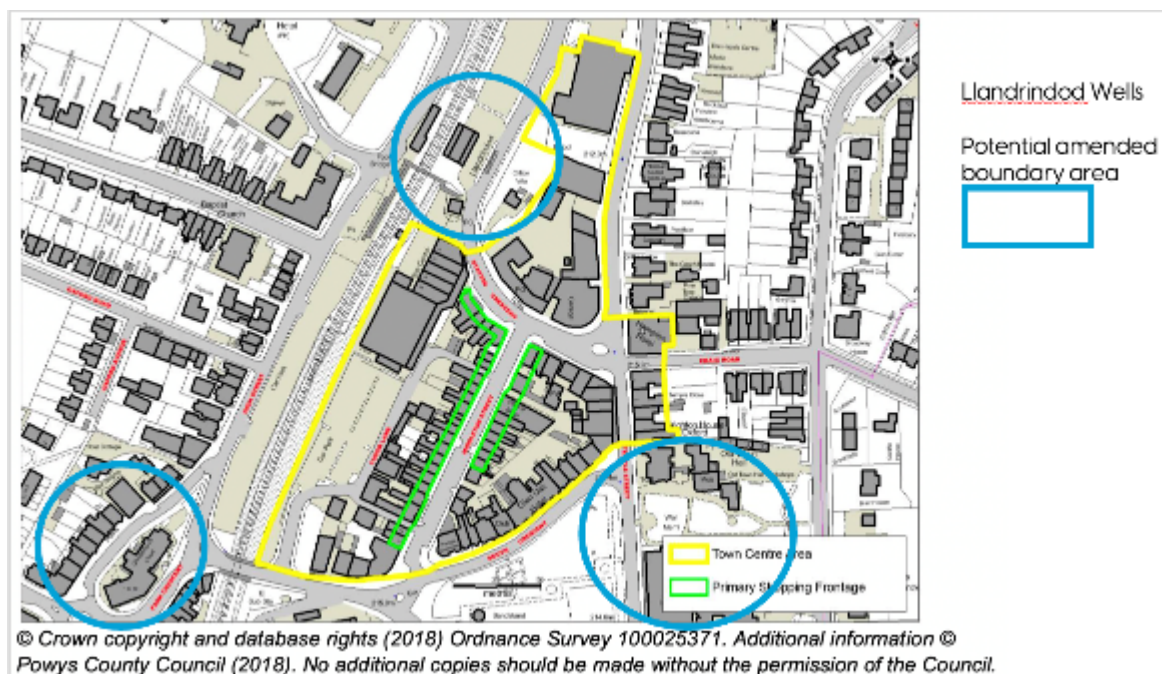
Whilst currently designated as an 'Area Retail Centre' in the adopted LDP, Llandrindod Wells town centre is identified as one of the 'Primary Towns' in the proposed retail hierarchy. This reflects its role and function in serving the retail, service and leisure needs of local residents and a wide rural catchment area based on an established and diverse range of commercial, service, supermarket provision and community uses and activities.

Town Centre Boundary

The centre is relatively small and compact in nature and follows naturally defined boundaries reflecting the layout of the centre. Vacancy rates are not particularly high or concentrated in any one area either. However, given the Area Retail Centre status and compact boundaries, there's significant scope for extending the town centre to reflect the multi-functional nature and wide range of the uses as well as allowing for future growth and regeneration. Options include:

- The railway station/bus Interchange and Station Crescent
- Museum, Metropole Hotel and car park
- The Crescent/High Street and Library

Figure 6: Llandrindod Wells potential amended town centre boundary



Llanidloes Health Check

Llanidloes is classified as an 'Area Retail Centre' in the retail hierarchy of the adopted LDP. Located adjacent to the A470, Llanidloes is located between Newtown (to the north east) and Rhayader (to the south). The town centre serves a large rural hinterland in the north west of Powys and contains a range of retail, service and leisure uses.

The key roles of Llanidloes include:

- Convenience shopping: local convenience offer including a Spar convenience store, independent butchers, bakers, greengrocers, fish deli, newsagents and health foods;
- Comparison shopping: a varied mix of independent retailers, many specialist in nature including antiques, fabrics, clothing, shoes, electricals, gifts, art and crafts, ceramics and bookshop. There is no national multiple comparison offer.
- Services: the centre provides a range of financial, and professional services, post office, estate agents, pharmacy, hairdressers, health and beauty, and IT services;
- Leisure: a good range of hotels, public houses, restaurants and cafés reflecting the importance of the visitor economy alongside the service function of the town centre;
- Community facilities: range of facilities including town hall, library, medical practice, community centre, Minerva Arts Centre and Hanging Gardens centre.

The main convenience facility (Co-op supermarket) is located outside the town centre together with a large furniture showroom (Hafren Furnishers), both at Llangurig Road. A weekly street market is held in Great Oak Street on Saturdays (Llani Charter Market).

Mix of Uses and Occupier Representation

Llanidloes town centre has a total of 86 retail/service units (excluding non-retail Class A uses), of which 68 units are identified as occupied, as recorded by the Local Data Company. The composition of the town centre confirms the dominance of comparison and leisure units. Both use categories are higher than the Powys and Welsh average especially in relation to leisure uses. The town centre also has a higher proportion of convenience units compared to the county and national average and confirms a healthy level of local provision. By contrast, the level of

service uses are underrepresented when compared to the Powys and Welsh average.

Table 10: Llanidloes use by unit

Type of business	Number of businesses	% of total business units
Comparison	25	29.1%
Convenience	9	10.5%
Leisure	23	26.7%
Miscellaneous	1	1.2%
Service	10	11.6%
Vacant	18	20.9%

Table 11: Llanidloes by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales Average	CLG	Powys Average
Comparison	36.8%	29.3%		35.2%
Convenience	13.2%	4.3%		10.2%
Leisure	33.8%	25.6%		25.4%
Miscellaneous	1.5%	9.0%		2.5%
Service	14.7%	31.8%		26.7%

Representation Comparison

Llanidloes town centre has a good level of comparison representation (36.8%) which is higher than the Powys average (35.2%), spread across a wide range of comparison categories (12 of the 16 categories are represented). Of the 25 comparison units, there is a higher proportion of books, arts and crafts, stationery, printers; car and motorcycle showroom; electrical goods; footwear; gifts, china, leather and gifts; jewellers; and sport, toys, cycles and hobbies compared to the Powys average. The categories of fashion and general clothing, and furniture, carpets, textiles, bathrooms and kitchens are slightly below the county average.

Table 12: Llanidloes breakdown of comparison units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Comparison	25	36.8%	35.2%

Books, Arts & Crafts, Stationery, Printers	6	8.8%	5.2%
Car & Motorbike Showrooms	1	1.5%	0.8%
Charity & Second-hand Shops	2	2.9%	4.4%
Chemists, Toiletries & Health	2	2.9%	2.9%
Department Stores & Mail Order	0	0.0%	0.3%
Discount & Surplus Stores	0	0.0%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	1	1.5%	1.3%
Electrical Goods & Home Entertainment	3	4.4%	3.2%
Fashion & General Clothing	1	1.5%	3.7%
Florists & Garden	0	0.0%	1.1%
Footwear	1	1.5%	0.8%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	1	1.5%	4.0%
Gifts, China & Leather Goods	4	5.9%	4.0%
Jewellers, Clocks & Watches	1	1.5%	0.7%
Pet Shops & Pet Supplies	0	0.0%	0.9%
Sports, Toys, Cycle Shops & Hobbies	2	2.9%	1.5%

Representation Convenience

The level of convenience provision (13.2% of occupied units) is higher than the Powys average (10.2%) with representation across the majority of the convenience categories. There is a higher proportion of bakers, butchers and fishmongers than the county average whilst the categories of confectionery, tobacco, newsagents and groceries, supermarkets and food shops broadly reflective of the Powys average.

The main convenience facility (Co-op) and a petrol filling station are both located outside the town centre.

Table 13: Llanidloes breakdown of convenience units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Convenience	9	13.2%	10.2%
Bakers	3	4.4%	1.5%

Butchers & Fishmongers	2	2.9%	2.0%
Confectionery, Tobacco, Newsagents	1	1.5%	1.6%
Groceries, Supermarkets & Food Shops	3	4.4%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	0	0.0%	0.3%

Representation Leisure

There is a high level of representation from leisure uses which account for 33.8% of occupied units. This is significantly higher than the Powys average (25.4%) and reflects the importance of the visitor economy. Representation from four of the five leisure categories is higher than the county average particularly with regard to restaurants; cafés and fast food; bars, pubs and clubs, and accommodation. The level of entertainment is lower than the county average.

Table 14: Llanidloes breakdown of leisure units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Leisure	23	33.8%	25.4%
Accommodation	4	5.9%	3.1%
Bars, Pubs & Clubs	5	7.4%	6.5%
Cafes & Fast Food	8	11.8%	10.4%
Entertainment	1	1.5%	1.9%
Restaurants	5	7.4%	3.6%

Representation Services

The proportion of services (14.7%) is lower than the Powys average (26.7%). The five service categories represented in the town centre are broadly reflective of the county average with the exception of hairdressing, health and beauty, which account for 4 units but represent 5.9% of service provision. The town centre also contains a Post Office (within the Spar) and professional services (estate agents and financial services) which reflects its role and function in the retail hierarchy.

Table 15: Llanidloes breakdown of service units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Service	10	14.7%	26.7%
Auto & Accessories	0	0.0%	0.3%
Auto Services	0	0.0%	0.4%
Banks, Financial Services & Building Societies	2	2.9%	3.2%
Employment & Post Offices	1	1.5%	1.6%
Estate Agents & Auctioneers	3	4.4%	4.1%
Hairdressing, Health & Beauty	4	5.9%	12.9%
Household & Home	0	0.0%	0.3%
Launderettes, Dry Cleaners & Other	0	0.0%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	0	0.0%	0.4%
Miscellaneous	1	1.5%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	0	0.0%	0.4%

Representation Largest All Categories & Independent/Multiple

The dominant business categories are focused on leisure uses, with cafés and fast food; bars, pubs and clubs, and restaurants accounting for over 26% of all occupied units. There is also good representation from some comparison categories associated with books, arts and crafts, stationery, printers; and gifts, china and leather.

Table 16: Llanidloes top five categories (does not include vacant units)

Category of business	Number of business units	Proportion of town centre units
Cafes & Fast Food	8	11.8%
Books, Arts & Crafts, Stationery, Printers	6	8.8%
Bars, Pubs & Clubs	5	7.4%
Restaurants	5	7.4%
Gifts, China & Leather Goods	4	5.9%

The breakdown of independent and multiple businesses confirms the independent focus of local businesses (85% of all occupied businesses). This is higher than the

Powys and Welsh average. The level of multiple representation is lower than the county and national average.

Table 17: Llanidloes independent & multiple business units (does not include vacant units)

	Number of businesses	Proportion of businesses	Powys average	Wales CLG Average
Independent	58	85%	80%	67%
Multiple	10	15%	20%	33%

Local Data Company evidence relating to openings and closures over the period 2019-2022 indicate the major change has been in relation to a net reduction of service units (four in total) in the town centre equating to a reduction of 28%. There has been no net change in convenience units over the period and a marginal reduction of one unit (-3.8%) in comparison units, and a reduction of two leisure units (-8%).

Vacancy

The Local Data Company identified 18 vacant retail units in Llanidloes town centre at the time of the survey equating to a vacancy rate of 21%. This is higher than the Powys and national average. The data indicates that the vacancy rate has increased since 2020 which historically had been below the national average. The distribution of vacant units are located throughout the town centre at Long Bridge Street, Great Oak Street, Short Bridge Street, China Street and High Street although a number of 'vacant' units appear to be in residential use.

Table 18: Llanidloes vacancy

Type of unit	Number of business units	% of business units	Wales CLG Average	Powys average
Occupied	68	79%	84%	88%
Vacant	18	21%	16%	12%
Total	86			

Environmental Quality & Character

The historic town centre is largely designated a Conservation Area and contains a significant number of listed buildings, including the Grade 1 listed Old Market Hall, which contribute to a varied and attractive built environment. The river Severn runs to the west of the town centre and whilst the B4818 passes through the town centre,

Long Bridge Street and Great Oak Street are not overly impacted by traffic with on street parking available throughout the town centre together with a dedicated car park at Mount Street and the Gro, the latter adjoining but outside the town centre boundary. Overall, the town centre is characterised by a sense of place and a strong environmental quality with evidence of public realm improvements.

Summary of Llanidloes Strengths and Weaknesses

Llanidloes town centre acts as an important retail, service, leisure and commercial destination which serves a large rural hinterland and an increasing visitor economy. Whilst located in proximity to other Powys centres including Newtown, the town centre provides a varied mix of commercial and community uses set within an attractive built environment.

- With the exception of service units, the proportion of occupied comparison, convenience and leisure units in the town centre is higher than the Powys and Welsh average.
- There is a good range of comparison categories including an over representation of specialist and distinctive uses.
- Convenience provision is good and whilst focused on top up provision including a range and choice of independent, specialist retailers which add to the qualitative offer.
- The level of leisure uses is comprehensive which in part serve the visitor economy as evidenced by the above average representation of restaurants, cafés, pubs and accommodation.
- There is a good provision of car parking both on street and dedicated car parks.
- A qualitative built environment with attractive streetscape and listed buildings.
- There has been a marked reduction in the level of service units in the town centre which is significantly lower than the Powys average.
- The town centre has an above average vacancy rate when compared to the Powys and Welsh average.
- There is a below average representation of entertainment units even though the level of leisure uses overall is good.

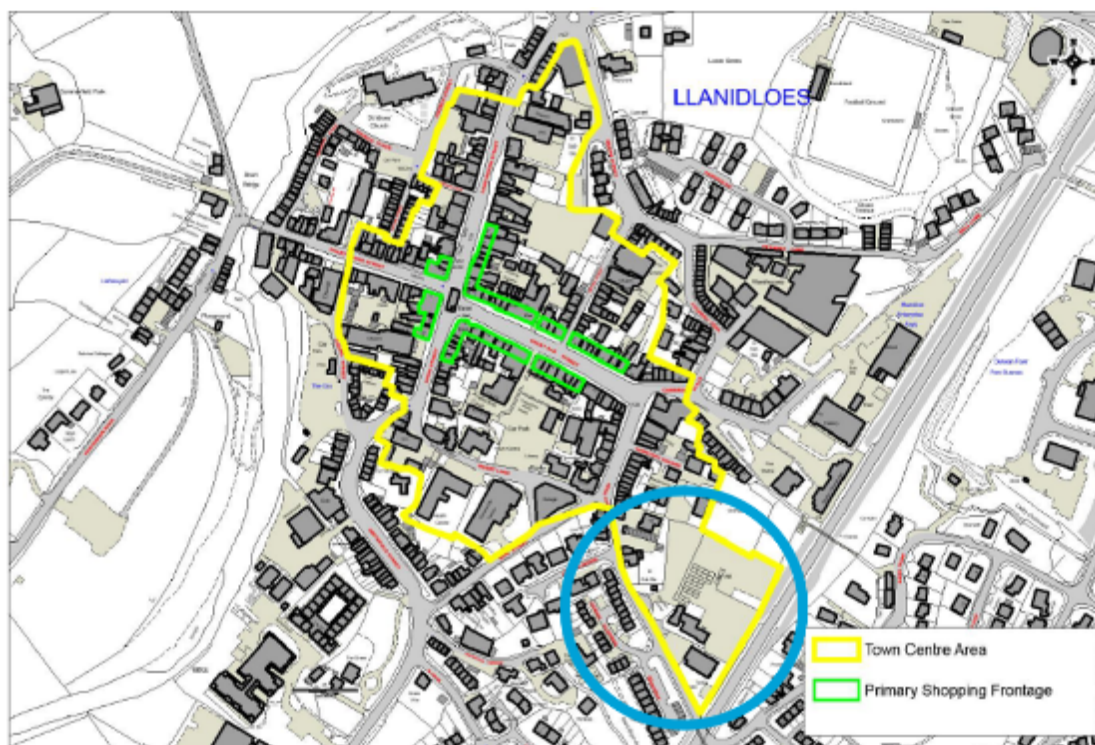
Whilst currently designated as an 'Area Retail Centre' in the adopted LDP, Llanidloes town centre is identified as one of the 'Primary Towns' in the proposed retail hierarchy. This reflects its role and function in serving the retail, service and leisure needs of local residents and a wide rural catchment area based on an established and diverse range of commercial, service and community uses and activities.

Town Centre Boundary

The town centre boundary is compact and focused on the core areas of commercial and community activity which in many locations is interspersed with residential uses. There are vacant units across the town centre although these are not particularly concentrated in one area which necessitate a need for change. Opportunities to extend the town centre boundary are constrained by its location between the river Severn and the A470 bypass together with established areas of commercial workspace and enterprise which characterise the area to the east of the town centre boundary. However, scope exists to review the extent of the town centre boundary to take account of residential development activity at the following option.

- The former livestock market site at Gorn Road which has been developed for residential use.

Figure 7: Llanidloes potential amended town centre boundary



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Machynlleth Health Check

Machynlleth is classified as an Area Retail Centre in the adopted Powys LDP. Located in the north-west of Powys, its nearest key centre is Dolgellau, Aberystwyth (Gwynedd) and Newtown. The centre has a variety of retail and service uses. The key roles of Machynlleth include:

- Convenience shopping, there is one supermarket (Co-op) which is supported by a Spar convenience store and a range of smaller units including newsagents and a butcher.
- Comparison shopping: the majority of comparison units are occupied by independent retailers with only a few multiples.
- Services: provides a range of services including a post office, job centre, high street banks, cafes, restaurants, takeaways, hairdressers, estate agents and beauty parlours.
- Entertainment: includes several pubs.
- Community facilities provide a range of community services including a cadet's centre and library.

Mix of Uses and Occupier Representation

Machynlleth has a total of 65 retail/service uses (excluding miscellaneous non-retail Class A uses) which is below the level recorded in 2012 (79). The centre has a significantly higher proportion of occupied comparison units than the Powys and Welsh averages. Convenience units are comparable to the Powys average however, leisure and services are both significantly below national average in terms of percentage of units.

Table 19: Machynlleth use by unit

Type of business	Number of businesses	% of total businesses
Comparison	29	44.6%
Convenience	6	9.2%
Leisure	11	16.9%
Miscellaneous	0	0.0%
Service	14	21.5%
Vacant	5	7.8%

Table 20: Machynlleth by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales Average	CLG	Powys Average
Comparison	48.3%	29.3%		35.4%
Convenience	10.0%	4.3%		10.1%
Leisure	18.3%	25.6%		25.0%
Miscellaneous	0.0%	9.0%		2.5%
Service	23.3%	31.8%		27.0%

Representation Comparison

Compared to the Powys average, there are a higher level of comparison shops (48%), however five categories are not represented in the centre including –fashion, florist, and sports/toy/cycle. The centre provides a significantly higher amount of book, arts and crafts, furniture / carpets /kitchen and shoe shops.

Table 21: Machynlleth breakdown of comparison units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Comparison	29	48.3%	35.4%
Books, Arts & Crafts, Stationery, Printers	7	11.7%	5.1%
Car & Motorbike Showrooms	0	0.0%	0.8%
Charity & Second-hand Shops	4	6.7%	4.5%
Chemists, Toiletries & Health	3	5.0%	3.0%
Department Stores & Mail Order	0	0.0%	0.3%
Discount & Surplus Stores	1	1.7%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	1	1.7%	1.3%
Electrical Goods & Home Entertainment	1	1.7%	3.2%
Fashion & General Clothing	0	0.0%	3.6%
Florists & Garden	0	0.0%	1.1%
Footwear	2	3.3%	0.8%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	6	10.0%	3.9%
Gifts, China & Leather Goods	2	3.3%	4.0%
Jewellers, Clocks & Watches	1	1.7%	0.7%
Pet Shops & Pet Supplies	1	1.7%	0.9%
Sports, Toys, Cycle Shops & Hobbies	0	0.0%	1.5%

Representation Convenience

Compared to the Powys average, the centre has a similar proportion and range of convenience shops (10%). The centre provides a marginally higher proportion of grocery, supermarkets and food shops than the Powys average.

Table 22: Machynlleth breakdown of convenience units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Convenience	6	10.0%	10.1%
Bakers	1	1.7%	1.5%
Butchers & Fishmongers	1	1.7%	2.0%
Confectionery, Tobacco, Newsagents	1	1.7%	1.5%
Groceries, Supermarkets & Food Shops	3	5.0%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	0	0.0%	0.3%

Representation Leisure

Compared to the Powys average, Machynlleth centre has a significantly lower proportion of leisure units (18%) across most categories. However, the number of restaurants is notably higher.

Table 23: Machynlleth breakdown of leisure units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Leisure	11	18.3%	25.0%
Accommodation	1	1.7%	2.6%
Bars, Pubs & Clubs	3	5.0%	6.6%
Cafes & Fast Food	4	6.7%	10.3%
Entertainment	0	0.0%	1.9%
Restaurants	3	5.0%	3.6%

Representation Services

Compared to the Powys average, the centre has a lower proportion of services (23%). Of all the categories represented the centre is noticeably above average for employment and post office and estate agents and auctioneers. The centre is below average in financial services and hairdressing and beauty.

Table 24: Machynlleth breakdown of service units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Service	14	23.3%	27.0%
Auto & Accessories	0	0.0%	0.3%
Auto Services	0	0.0%	0.4%
Banks, Financial Services & Building Societies	1	1.7%	3.2%
Employment & Post Offices	2	3.3%	1.6%
Estate Agents & Auctioneers	4	6.7%	4.2%
Hairdressing, Health & Beauty	3	5.0%	13.1%
Household & Home	0	0.0%	0.3%
Launderettes, Dry Cleaners & Other	0	0.0%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	0	0.0%	0.3%
Miscellaneous	0	0.0%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	0	0.0%	0.4%

Representation Largest All Categories & Independent/Multiple

Across all categories, the largest number of business units are in comparison uses with books, art and craft and furniture and bathrooms the largest overall category.

Table 25: Machynlleth top five categories (does not include vacant units)

Category of business	Number of businesses	Proportion of town centre units
Books, Arts & Crafts, Stationery, Printers	7	11.7%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	6	10.0%

Charity & Second-hand Shops	4	6.7%
Cafes & Fast Food	4	6.7%
Estate Agents & Auctioneers	4	6.7%

A breakdown on independent and multiple businesses shows Machynlleth is more independent than the average for Powys and significantly more independent than in Wales.

Table 26: Machynlleth independent & multiple business units

	Number of businesses	Proportion of businesses	Powys average	Wales CLG Average
Independent	49	82%	79%	67%
Multiple	11	18%	21%	33%

Vacancy

There were 5 vacant retail units within town centre at the time of the survey which is lower than in 2012 and resulting in a vacancy rate lower than the Powys and Welsh average. The vacant units are distributed along Heol Maengwyn the main commercial street.

Table 27: Machynlleth vacancy

Type of unit	Number of business units	% of business units	Wales CLG Average	Powys average
Occupied	60	92%	84%	89%
Vacant	5	8%	16%	11%
Total	65			

Environmental Quality & Character

The historic rural market town is centred along Heol Maengwyn, with a wide market street with numerous historic buildings, including the medieval town house known as The Parliament House in Maengwyn Street. There are many other interesting buildings with medieval origins and interesting features including the prominent clocktower and memorial. The defined town centre is linear in nature with wide pavements providing a generally good quality pedestrian environment. However, the centre looks and feels drawn out and extensive in nature and there are areas around its edge particularly Heol y Doll where the commercial role lessens.

Summary of Strengths and Weaknesses

Machynlleth provides a good range and choice of mainly independent businesses, with only a handful of national retailers. The strength of the comparison and convenience offer means the centre continues its role as a main shopping centre in north Powys and has a cross border role for the Afon Dyfi communities in Gwynedd. The leisure and services offer are less strong, although the presence of the town centre job centre does emphasise its wider regional importance.

The low proportion of health and beauty and fashion retail is a notable weakness for the diversity of the offer; however, this is counterbalanced with strengths such as books, arts and crafts and shoe shops. The lack quality and range of choice of shopping, leisure and entertainment facilities in comparison to other centres is however a concern.

- The number of units located in the town centre has declined slightly over the last ten years (65)
- Higher levels of occupation in comparison units than the Powys and Welsh average
- Food and grocery provision in the centre is larger than the Powys average and suitable for both main and top up food shopping, and the centre contains one small Co-op supermarket – together with the Spar convenience store and a range of smaller convenience goods units.
- Across all categories, the largest number of business units are in comparison uses with books, art and craft and furniture and bathrooms the largest overall category
- The centre has very good public transport accessibility, and provides a good level of car parking for shoppers
- Vacancy rate lower than the Powys and Welsh average with units available for occupation within the main shopping areas
- The centre does not offer the same quality and range of facilities available in nearby larger centres including Aberystwyth and Newtown
- The centre provides an average range of service facilities and uses complementary to its main shopping role, and poor leisure and entertainment facilities for its level in the hierarchy.
- The proportion of fashion clothing units are significantly below average, and the town lacks national multiple retailers.

Whilst currently designated as an 'Area Retail Centre' in the adopted LDP, the town centre is identified as one of the 'Primary Towns' in the proposed retail hierarchy. This reflects its role and function in serving the retail, service and leisure needs of

local residents and a wide rural catchment area based on an established and diverse range of commercial, service, supermarket provision and community uses and activities.

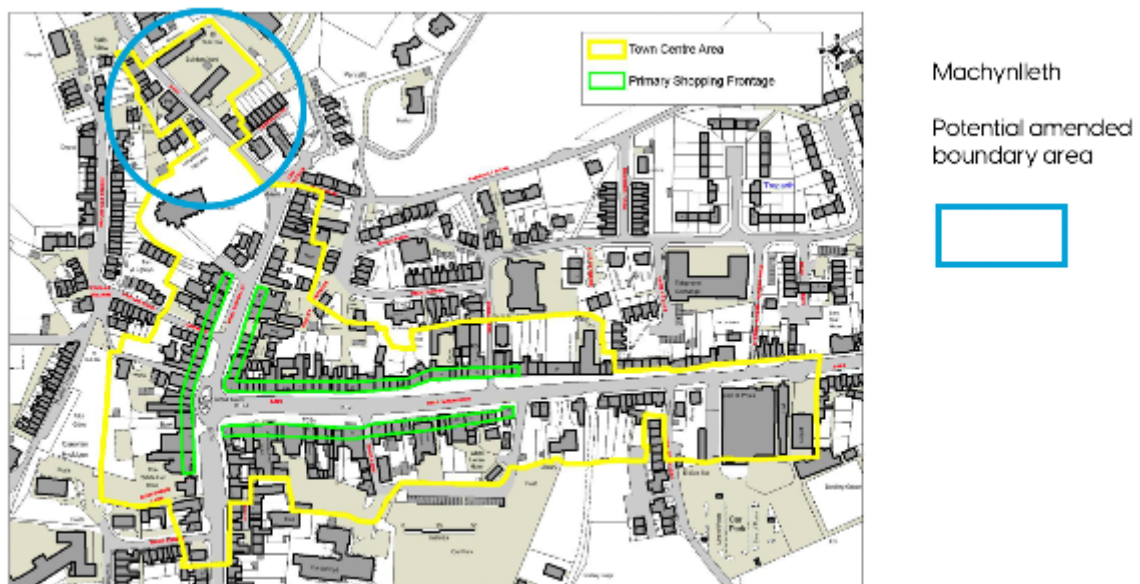
Town Centre Boundary

The linear nature of the town centre is long and drawn out and interspersed towards the edges by clusters of residential property that are beginning to fragment the commercial nature of some parts. Vacancy rates are not particularly high or concentrated in any one area, although more notable near Heol y Doll

Heol y Doll is particularly distinct from the centre, separated physically by St Peter's Church and the Memorial and with a minor commercial/shopping role and poorer quality pedestrian environment.

Given the widely drawn linear nature of the defined centre, there's limited scope for extending the town centre to reflect the multi-functional nature and wide range of the uses. However, retaining the aforementioned Heol y Doll area within the centre would allow scope for future growth and regeneration of the Area Centre particularly where key brownfield opportunities exist.

Figure 8: Machynlleth potential amended town centre boundary



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Newtown Health Check

Newtown is designated an 'Area Retail Centre' in the retail hierarchy of the adopted LDP. The town centre serves the north west of Powys and is located between Welshpool (to the north east), Llandrindod Wells (to the south) and Llanidloes (to the south west). Newtown town centre is home to a range of retail, service, leisure and community uses together with a concentration of large offices. The main focus for activity is at Broad Street, High Street and the Bear Lanes Shopping Centre together with secondary areas towards New Road.

The key roles of Newtown town centre include:

- Convenience shopping: the town centre contains one supermarket (Iceland) together with a Spar convenience store, independent butchers, deli, grocers and newsagents;
- Comparison shopping: a good range of independent and multiple provision (Argos, New Look, Boots, Superdrug, WH Smith) which includes Bear Lanes Shopping Centre (40,000 sq. ft), Charlies Stores and a diverse range of smaller units.
- Services: the town centre provides a wide range of high street banking, financial and professional services, post office, estate agents, travel agents, pharmacy, hairdressers, health and beauty services.
- Leisure: a range of public houses, night club, Regent cinema, restaurants, cafés and hotel;
- Community facilities: range of facilities including the council offices, medical practice, railway station and museum.

There are a number of retail facilities outside the town centre, especially convenience supermarkets including Tesco, Morrisons, Aldi and Lidl together with McDonalds, Poundstretcher and Greggs.

Mix of Uses and Occupier Representation

Newtown town centre has a total of 178 retail/service/leisure units (excluding non-retail Class A uses), of which 146 units are occupied, as identified by the Local Data Company. Service uses account for the largest number of units in the town centre. In terms of composition, the proportion of leisure and service units in Newtown town centre is higher than the Powys average although the level of comparison and convenience units is lower than the county average. Compared to the Welsh average, the proportion of comparison, convenience and leisure uses by unit in the

town centre is higher than the national position although the proportion of service uses is marginally lower.

Table 28: Newtown use by unit

Type of business	Number of businesses	% of total business units
Comparison	44	24.7%
Convenience	13	7.3%
Leisure	38	21.3%
Miscellaneous	6	3.4%
Service	45	25.3%
Vacant	32	18.0%

Table 29: Newtown by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales Average	CLG	Powys Average
Comparison	30.1%	29.3%		35.4%
Convenience	8.9%	4.3%		10.1%
Leisure	26.0%	25.6%		25.0%
Miscellaneous	4.1%	9.0%		2.5%
Service	30.8%	31.8%		27.0%

Representation Comparison

Newtown town centre has a range and diversity of comparison representation (30.1%) which is over 5% lower than the Powys average. With the exception of car and motorcycle showrooms, all of the comparison categories are represented in the town centre. There is an above average level of representation in fashion and general clothing; pet shops; florists and garden; department store and discount/surplus stores when compared to the Powys average. The categories of books, arts & crafts, stationary together with gifts, china and leather goods are well below the Powys average.

Table 30: Newtown breakdown of comparison units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Comparison	44	30.1%	35.2%
Books, Arts & Crafts, Stationery, Printers	3	2.1%	5.2%

Car & Motorbike Showrooms	0	0.0%	0.8%
Charity & Second-hand Shops	6	4.1%	4.4%
Chemists, Toiletries & Health	3	2.1%	2.9%
Department Stores & Mail Order	1	0.7%	0.3%
Discount & Surplus Stores	1	0.7%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	1	0.7%	1.3%
Electrical Goods & Home Entertainment	5	3.4%	3.2%
Fashion & General Clothing	8	5.5%	3.7%
Florists & Garden	2	1.4%	1.1%
Footwear	1	0.7%	0.8%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	5	3.4%	4.0%
Gifts, China & Leather Goods	4	2.7%	4.0%
Jewellers, Clocks & Watches	1	0.7%	0.7%
Pet Shops & Pet Supplies	2	1.4%	0.9%
Sports, Toys, Cycle Shops & Hobbies	1	0.7%	1.5%

Representation Convenience

The level of convenience provision at 8.9% is slightly lower than the Powys average (10.2%). There is no representation from off licences or petrol filling stations although the number of butchers and fishmongers, and confectionery, tobacco and newsagents exceeds the Powys average. By contrast, there is an under representation of bakers and grocers, supermarkets and food shops compared to the Powys average. There are a number of national supermarkets with representation located outside of the town centre.

Table 31: Newtown breakdown of convenience units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Convenience	13	8.9%	10.2%
Bakers	1	0.7%	1.5%
Butchers & Fishmongers	3	2.1%	2.0%
Confectionery, Tobacco, Newsagents	3	2.1%	1.6%
Groceries, Supermarkets & Food Shops	6	4.1%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	0	0.0%	0.3%

Representation Leisure

There is an above average representation from leisure uses in the town centre which is higher than the Powys average. Representation from three of the five leisure categories exceed the county average in regard to cafés and fast food; bars, pubs & clubs, and entertainment. The categories of accommodation in particular, together with restaurants, is lower than the county average.

Table 32: Newtown breakdown of leisure units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Leisure	38	26.0%	25.4%
Accommodation	2	1.4%	3.1%
Bars, Pubs & Clubs	11	7.5%	6.5%
Cafes & Fast Food	16	11.0%	10.4%
Entertainment	4	2.7%	1.9%
Restaurants	5	3.4%	3.6%

Representation Services

The proportion of services in Newtown town centre is higher than the Powys average (26.7%) with representation from the majority of the service categories. There is an above county average representation from a number of categories especially in the significantly higher proportion of hairdressing, health and beauty together with laundrettes and dry cleaners; travel agents, miscellaneous and banks, financial and professional services. In the case of the latter, the town centre has a healthy concentration of high street banks in contrast to the other town centres across Powys.

Table 33: Newtown breakdown of service units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Service	45	30.8%	26.7%
Auto & Accessories	0	0.0%	0.3%
Auto Services	1	0.7%	0.4%
Banks, Financial Services & Building Societies	7	4.8%	3.2%

Employment & Post Offices	3	2.1%	1.6%
Estate Agents & Auctioneers	3	2.1%	4.1%
Hairdressing, Health & Beauty	27	18.5%	12.9%
Household & Home	0	0.0%	0.3%
Launderettes, Dry Cleaners & Other	2	1.4%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	0	0.0%	0.4%
Miscellaneous	6	4.1%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	1	0.7%	0.4%

Representation Largest All Categories & Independent/Multiple

The dominant business category is focused on hairdressing, health and beauty which account for over 18% of all occupied units, followed by cafés and fast food. Bars, pubs and clubs together with fashion and general clothing, and banks and financial services are also dominant categories which reflect the higher order offer available in the town centre and its role and function as the main retail and commercial town centre in Powys.

Table 34: Newtown top five categories (does not include vacant units)

Category of business	Number of businesses	Proportion of town centre units
Hairdressing, Health & Beauty	27	18.5%
Cafes & Fast Food	16	11.0%
Bars, Pubs & Clubs	11	7.5%
Fashion & General Clothing	8	5.5%
Banks, Financial Services & Building Societies	7	4.8%

The breakdown and mix of businesses in Newtown town centre confirms a higher proportion of multiple representation when compared to the Powys average but lower than the Welsh average. In regard to independent representation, the proportion of businesses in the town centre is lower than the county average but higher than the national average.

Table 35: Newtown independent & multiple businesses (does not include vacant units)

	Number of businesses	Proportion of businesses	Powys average	Wales CLG Average
Independent	110	75%	80%	67%
Multiple	36	25%	20%	33%

The Local Data Company data related to openings and closures over the period 2019-2022 identified a noticeable net reduction of 17 units in the town centre with a marked reduction in comparison units (-17%) and service units (-13.5%). Over the same period, there has been no change in the number of convenience units whilst there has been a marginal increase (+2.7%) in leisure units.

Vacancy

The Local Data Company identified a vacancy rate of 18% in the town centre (32 vacant units). This is higher than the Powys and national average. The same data confirms the vacancy rate has increased from 14.2% in 2019 and peaked in 2021. The distribution of vacant units are concentrated at Bear Lanes Shopping Centre and Broad Street alongside a scattered distribution throughout the town centre.

Table 36: Newtown vacancy

Type of unit	Number of business units	% of business units	Wales CLG Average	Powys average
Occupied	146	82%	84%	88%
Vacant	32	18%	16%	12%
Total	178			

Environmental Quality & Character

The town centre is characterised by a number of distinct areas with the majority of the traditional town centre located to the north of New Road and set within the loop of the River Severn which also forms part of a Conservation Area with many listed buildings. The built environment in this area is attractive and combines a mix of buildings including the purpose built Bear Lanes shopping centre set behind the existing façade of buildings fronting Broad Street and High Street. The overall environmental quality is good and well maintained with traffic circulation managed through the town centre, provision of on street parking and large public car parking areas at the fringe of the town centre.

The south western area of the town centre off Park Street and New Church Road is dominated by large offices and community facilities whilst the area to the south of New Road through to the railway station is characterised as a mixed commercial area which includes employment units, offices (including the Pryce Jones building) and "drive-thru" fast food restaurant. These areas of the town centre are largely in commercial and employment use together with local highways and linkages with Newtown railway station.

Summary of Newtown Strengths and Weaknesses

Newtown town centre represents the main shopping, leisure, service and commercial destination in Powys that has traditionally served the north-west of the county. The town centre contains a number of distinct activity areas separated by New Road (which has benefitted from the opening of the A489 Newtown bypass) and supports a wide range of facilities and uses reflecting the higher order status of the town centre which ensures a concentration of services and ancillary facilities which complement the retail, employment and leisure role of the town centre.

- The largest town centre in Powys with a wide range and choice of uses and facilities including major modern office accommodation.
- A varied comparison offer which includes a dedicated shopping centre and an above average proportion of fashion and clothing representation although the overall proportion of comparison units is lower than the Powys average.
- The town centre has experienced a net reduction of comparison units in recent years.
- Convenience provision is marginally below the Powys average but significantly higher than the Welsh average.
- There is a significant range and choice of main convenience provision outside the town centre.
- The overall proportion of leisure units is higher than the Powys average especially in relation to the representation of cafés and fast food; bars, pubs and clubs, and entertainment.
- The proportion of services in Newtown town centre is higher than the Powys average with a marked over representation of hairdressing, health and beauty, and high street banks.
- The level of national multiple representation is higher than the Powys average.
- Newtown town centre has an above average vacancy rate when compared to the Powys and Welsh average with evidence the vacancy rate has risen since 2019.

- There is a good public transport accessibility and provision of car parking at the edge of the town centre.
- The traditional town centre environment and streetscape is attractive and well maintained with evidence of residential regeneration activity to the south of New Road.

Newtown is currently designated as an 'Area Retail Centre' in the adopted LDP. As the largest town centre in Powys which supports a comprehensive range of retail, employment, service, leisure and community uses, the town centre is identified as a 'Sub Regional Centre' in the proposed retail hierarchy. This reflects its role, function and status as a regional administrative centre combined with the concentration of mixed commercial, service and community uses which serve the local community and a wide catchment area.

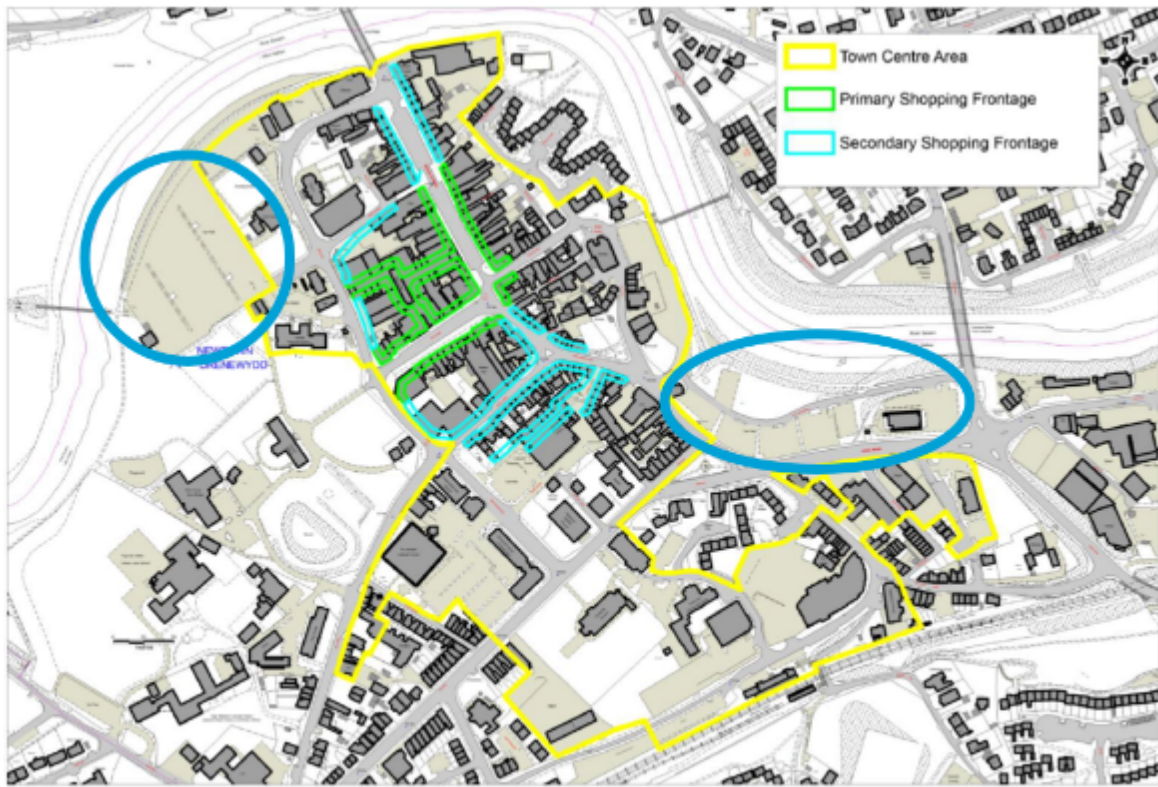
Town Centre Boundary

The town centre boundary is extensive and covers the various functions of the wider town centre which extend beyond the traditional retail and service core area. As a consequence, the town centre is categorised by a number of distinct activity areas which are effectively separated by New Road with the retail, office and community functions to the north of the road and a mixed commercial area to the south.

Given its current designation as an Area Retail Centre and recommendation as a Sub Regional Centre, there are opportunities to extend the town centre boundary to accommodate potential new areas for future growth and regeneration. Options include:

- Land at between Heol Les Herbiers and New Road incorporating the public parking areas and fast food drive through (McDonalds) to the B4568 bridge.
- Back Lane car park.

Figure 9: Newtown potential amended town centre boundary



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Welshpool Health Check

Welshpool is designated an 'Area Retail Centre' in the retail hierarchy of the adopted LDP. The town centre serves a large rural hinterland in the north east of Powys (together with the local centres of Llanfair Caereinion, Llanfyllin and Montgomery) and provides a wide range of retail, service and leisure uses focused on Broad Street together with Berriew Street, Severn Street and Church Street.

The key roles of Welshpool town centre include:

- Convenience shopping: the town centre contains one large supermarket (Morrisons) together with a number of independent bakers, butchers, grocers, health foods and newsagents together with an Indoor market;
- Comparison shopping: a varied mix of independent retailers and some multiple provision (Boots, Poundland, M & Co, British Heart Foundation) which provide a diverse range focused on Broad Street and the A458 crossroads together with Puzzle Square arcade and indoor market.
- Services: the town centre provides a range of financial, and professional services, post office, estate agents, pharmacy, hairdressers, health and beauty, and IT services. There are currently no high street banks in Welshpool town centre;
- Leisure: a range of public houses, restaurants, cafés and hotel together with gym;
- Community facilities: range of facilities including the town hall, town council offices, library and museum and county council offices.

A number of retail facilities exist beyond the eastern fringe of the town centre including a Tesco supermarket, Aldi and B&M at Mill Lane together with the Old Station (retail and restaurant). Welshpool railway station is also located to the south east of the town centre.

Mix of Uses and Occupier Representation

Welshpool town centre has a total of 170 retail/service/leisure units (excluding non-retail Class A uses), of which 151 units are occupied, as identified by the Local Data Company. The town centre has a high proportion of comparison units which exceed the Powys and national average whilst the proportion of occupied convenience units is below the county average but higher than the Welsh average. In terms of leisure units, the town centre is lower than both the county and national average, and has a marginally higher proportion of service compared to the county average but lower than the national average.

Table 37: Welshpool use by unit

Type of business	Number of businesses	% of total business units
Comparison	62	36.5%
Convenience	9	5.3%
Leisure	31	18.2%
Miscellaneous	6	3.5%
Service	43	25.3%
Vacant	19	11.2%

Table 38: Welshpool by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales Average	CLG	Powys Average
Comparison	41.1%	29.3%		35.4%
Convenience	6.0%	4.3%		10.1%
Leisure	20.5%	25.6%		25.0%
Miscellaneous	4.0%	9.0%		2.5%
Service	28.5%	31.8%		27.0%

Representation Comparison

Welshpool town centre has a good level of comparison representation (41.1%) which is higher than the Powys average (35.2%). All of the comparison categories are represented with the exception of department stores. Of the 62 comparison units, there is a higher proportion of fashion and general clothing, and electrical goods and home entertainment in particular together with books, arts and crafts, stationary; discount stores; footwear, florists and garden, and pet shops when compared to the Powys average. The other categories are broadly reflective of the Powys average.

Table 39: Welshpool breakdown of comparison units

Category of business (organised by type – in bold)	Number of businesses	Proportion of town centre units	Powys average
Comparison	62	41.1%	35.2%
Books, Arts & Crafts, Stationery, Printers	9	6.0%	5.2%
Car & Motorbike Showrooms	1	0.7%	0.8%
Charity & Second-hand Shops	6	4.0%	4.4%
Chemists, Toiletries & Health	4	2.6%	2.9%

Department Stores & Mail Order	0	0.0%	0.3%
Discount & Surplus Stores	1	0.7%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	2	1.3%	1.3%
Electrical Goods & Home Entertainment	10	6.6%	3.2%
Fashion & General Clothing	10	6.6%	3.7%
Florists & Garden	2	1.3%	1.1%
Footwear	2	1.3%	0.8%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	6	4.0%	4.0%
Gifts, China & Leather Goods	5	3.3%	4.0%
Jewellers, Clocks & Watches	1	0.7%	0.7%
Pet Shops & Pet Supplies	2	1.3%	0.9%
Sports, Toys, Cycle Shops & Hobbies	1	0.7%	1.5%

Representation Convenience

The level of convenience provision (6% of occupied units) is lower than the Powys average (10.2%) with representation across the majority of the convenience categories with the exception of off licences. There is an under representation in four of the convenience categories when compared to the Powys average especially in regard to groceries, supermarkets and food shops. A large Morrisons supermarket is located in the town centre although a number of supermarkets have closed in recent years. Tesco and Aldi are both located beyond the town centre boundary.

Table 40: Welshpool breakdown of convenience units

Category of business (organised by type – in bold)	Number of businesses	Proportion of town centre units	Powys average
Convenience	9	6.0%	10.2%
Bakers	2	1.3%	1.5%
Butchers & Fishmongers	2	1.3%	2.0%
Confectionery, Tobacco, Newsagents	1	0.7%	1.6%
Groceries, Supermarkets & Food Shops	3	2.0%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	1	0.7%	0.3%

Representation Leisure

There is a below average representation from leisure uses which account for 20.5% of occupied units compared to the Powys average (25.4%). Two of the five leisure

categories are higher than the county average in regard to cafés and fast food, and entertainment. The level of representation from bars, pubs and clubs, and restaurants is lower than the county average with no representation from accommodation.

Table 41: Welshpool breakdown of leisure units

Category of business (organised by type – in bold)	Number of businesses	Proportion of town centre units	Powys average
Leisure	31	20.5%	25.4%
Accommodation	0	0.0%	3.1%
Bars, Pubs & Clubs	7	4.6%	6.5%
Cafes & Fast Food	17	11.3%	10.4%
Entertainment	3	2.0%	1.9%
Restaurants	4	2.6%	3.6%

Representation Services

The proportion of services (28.5%) is higher than the Powys average (26.7%) with representation from the majority of the service categories. There is an above county average representation from auto & accessories; hairdressing, health and beauty; household and home; laundrettes and dry cleaners; travel agents and miscellaneous. The level of banks, financial and professional services, employment and post offices is lower than the county average.

Table 42: Welshpool breakdown of service units

Category of business (organised by type – in bold)	Number of businesses	Proportion of town centre units	Powys average
Service	43	28.5%	26.7%
Auto & Accessories	2	1.3%	0.3%
Auto Services	0	0.0%	0.4%
Banks, Financial Services & Building Societies	4	2.6%	3.2%
Employment & Post Offices	1	0.7%	1.6%
Estate Agents & Auctioneers	6	4.0%	4.1%
Hairdressing, Health & Beauty	23	15.2%	12.9%
Household & Home	1	0.7%	0.3%
Launderettes, Dry Cleaners & Other	2	1.3%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	0	0.0%	0.4%
Miscellaneous	6	4.0%	2.8%

Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	1	0.7%	0.4%

Representation Largest All Categories & Independent/Multiple

The dominant business categories are focused on hairdressing, health and beauty which account for over 15% of all occupied units together with cafés and fast food. In addition, three of the comparison business categories together account for over 19% of all occupied units.

Table 43: Welshpool breakdown of service units

Category of business	Number of businesses	Proportion of town centre units
Hairdressing, Health & Beauty	23	15.2%
Cafes & Fast Food	17	11.3%
Electrical Goods & Home Entertainment	10	6.6%
Fashion & General Clothing	10	6.6%
Books, Arts & Crafts, Stationery, Printers	9	6.0%

The breakdown of independent and multiple businesses confirms the composition of Welshpool town centre accords with the Powys average. In comparison to the national average, the level of independent representation is higher in the town centre although the level of multiple representation is lower.

Table 44: Welshpool independent & multiple businesses (does not include vacant units)

	Number of businesses	Proportion of businesses	Powys average	Wales CLG Average
Independent	121	80%	80%	67%
Multiple	30	20%	20%	33%

Local Data Company evidence relating to openings and closures over the period 2019-2022 indicate the major change has been in relation to a net reduction of convenience units (-25%) in the town centre. There has been a circa 15% increase in leisure units over this period and a marginal increase (3.3%) in comparison units.

Vacancy

The Local Data Company survey identified 19 vacant retail units in Welshpool town centre equating to a vacancy rate of 11.2%. This is lower than the Powys and national average. The same C evidence indicates that the vacancy rate has increased marginally in the town centre from 9.3% in 2020. The distribution of vacant units are concentrated at Broad Street, Berriew Street and High Street.

Table 45: Welshpool vacancy

Type of unit	Number of business units	% of business units	Wales Average	CLG	Powys average
Occupied	151	89%	84%		88%
Vacant	19	11%	16%		12%
Total	170				

Environmental Quality & Character

The town centre is designated a Conservation Area and contains many listed buildings including the town hall and market. There is a varied and attractive built environment with the linear town centre focused along Broad Street (one way system) and the crossroads with Berriew Street, Severn Street and Church Street (one way) which ensure local traffic circulation in the town centre is managed but can be busy. On street parking is available in Broad Street together with a number of large public car parks at the fringe of the town centre. Overall, the town centre has a good environmental quality and is generally well maintained with concentrations of residential units especially at the fringes of the town centre such as the western end of Broad Street.

Summary of Welshpool Strengths and Weaknesses

Alongside an important administrative and employment role, Welshpool town centre is the main shopping, leisure and service destination serving north east Powys. The town centre contains a wide range, choice and mix of offer focused on independent occupiers with a limited number of national multiples set within an attractive traditional town centre which includes a Morrisons supermarket and a small shopping arcade (Puzzle Square).

- A large number of occupied units in the town centre.
- A comprehensive comparison offer which is significantly higher than the Powys average with all but one of the comparison categories represented.
- Convenience provision is below the Powys average but higher than the Welsh average. There is a large Morrisons supermarket complemented by a range of independent convenience retailers.

- The town centre has lost a number of main convenience facilities over recent years following closures of Sainsbury, Iceland and Coop.
- The overall level of leisure units is lower than the Powys average although there is an above county average representation of cafés and fast food outlets in the town centre.
- The town centre has a good range of service uses with the proportion of service units higher than the Powys average, especially for hairdressing, health and beauty.
- There are no high street banks in the town centre; a banking hub is proposed to address the lack of banks.
- There is a good provision of dedicated car parking at the edge of the town centre.
- A number of edge of centre facilities are located to the east of the town centre including Tesco, B&M, Aldi and the railway station.
- The town centre has a below average vacancy rate when compared to the Powys and Welsh average although there are a number of large vacant units.
- The town centre environment and streetscape are attractive.

Welshpool is currently designated as an 'Area Retail Centre' in the adopted LDP. It is characterised as one of the largest town centres in Powys and supports a varied range of retail, employment, service, leisure and community uses. The town centre provides for the needs of local residents and acts as an important commercial and service centre for a wide rural catchment. Given this role and function, Welshpool town centre is identified as one of the 'Primary Towns' in the proposed retail hierarchy.

Town Centre Boundary

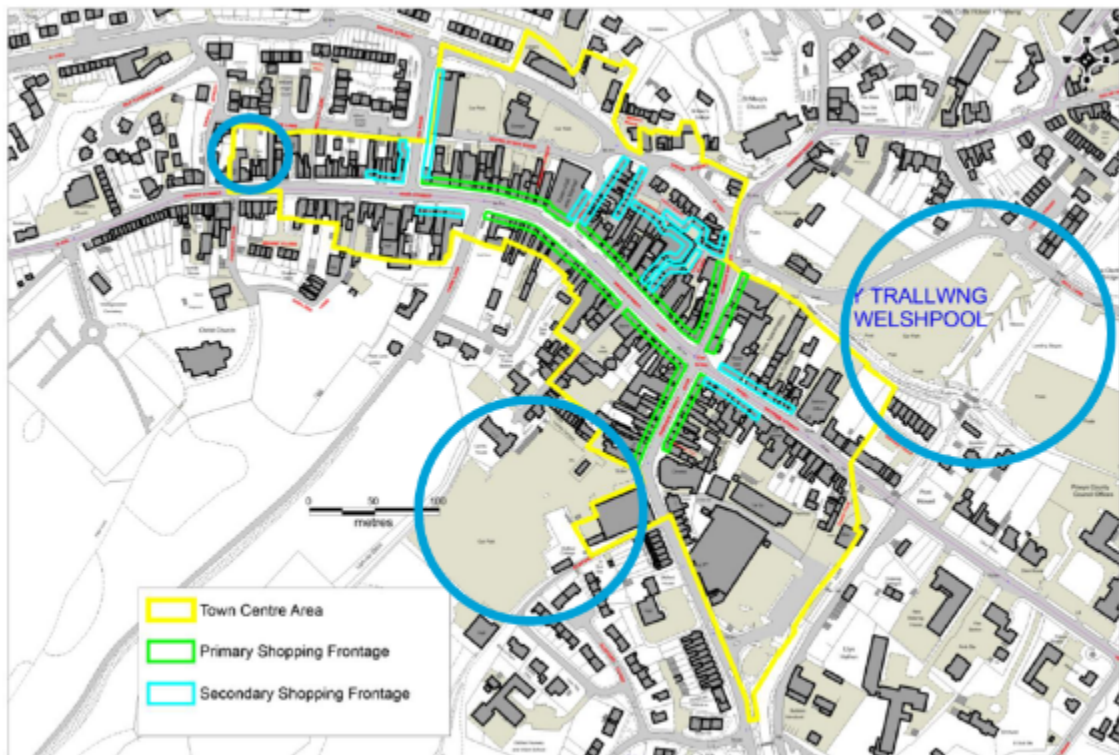
The town centre boundary currently aligns with the traditional areas of commercial and community activity in Welshpool town centre focused on the linear Broad Street, High Street and Severn Street together with Berriew Street and Church Street. Given the designation of Welshpool as an Area Retail Centre and the 'Primary Towns' recommendation in the proposed retail hierarchy, there are opportunities for review and potential changes to the town centre boundary in a number of locations, which include new facilities which represent key footfall attractors in close proximity to the town centre alongside existing areas which could support future change and regeneration. Options include:

- Smithfield Road and Mill Lane which accommodate Tesco supermarket, B&M and Aldi together with Church Street car parks and tourist information centre.
- Old Station building, railway station car park and railway platforms (on the opposite side of the A483) whilst further separated and distanced to

east/south east of the centre boundary could be considered if the boundary is extended to include Tesco.

- Berriew Street car park.
- Western fringe of the boundary at Mount Street amended to take account of residential uses.

Figure 10: Welshpool potential amended town centre boundary



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Builth Wells Health Check

Builth Wells is classified as an 'District Retail Centre' in the adopted Powys LDP. Located between the other key centres of Ystradgynlais and Llandrindod Wells, Builth Wells serves the catchment of mid Powys and the northern section of south Powys. The centre has a variety of retail and service uses. The key roles of Builth Wells include:

- Convenience shopping: the only convenience store within Builth Wells town centre is Premier Stores which is supported by a range of smaller units including newsagents, butchers, bakers, and off-licence.
- Comparison shopping: offers a small range of national multiple retailers including Boots and the British Red Cross as well as large number of independent retailers including a notable amount of fashion/clothing businesses.
- Services: provides a range of services including a post office, a high street bank, cafes, restaurant, takeaways, hairdressers, estate agents and beauty parlours;
- Leisure includes Wyeside Arts Centre and several pubs;
- Community facilities: provides a small range of community services including a community hall. Since 2012 the library has relocated to the Council offices located outside of the centre

In addition to the town centre, there's a Co-op supermarket located outside the centre on Brecon Road and cluster of roadside retail and hospitality businesses located at Station Road Llanelwedd including a second Co-op store.

Mix of Uses and Occupier Representation

Builth Wells has a total of 63 retail/service uses (excluding non-retail Class A uses) which remains at the same level recorded in 2012. The centre has a significantly higher proportion of occupied comparison, convenience and leisure units than the Welsh average. However, services are the only category that are below national average in terms of percentage of units.

Table 46: Builth Wells use by unit

Type of business	Number of business units	% of total business units
Comparison	20	32%
Convenience	6	10%
Leisure	18	29%
Miscellaneous	0	0%

Service	12	19%
Vacant	7	11%

Table 47: Built Wells by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales Average	CLG
Comparison	35.7%	29.3%	
Convenience	10.7%	4.3%	
Leisure	32.1%	25.6%	
Miscellaneous	0.0%	9.0%	
Service	21.4%	31.8%	

Representation Comparison

Compared to the Powys average, Built Wells centre has a similar selection of comparison shops (35%). All of the comparison categories are represented in the centre apart from four categories – car showroom, department store, footwear and jewellery/watches. The centre provides a significantly higher proportion of fashion and clothing than the Powys average. The only other categories which are noticeably higher than the Powys average are charity shops, discount stores and pet shops/supplies.

Table 48: Built Wells breakdown of comparison units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Comparison	20	35.7%	35.2%
Books, Arts & Crafts, Stationery, Printers	2	3.6%	5.2%
Car & Motorbike Showrooms	0	0.0%	0.8%
Charity & Second-hand Shops	3	5.4%	4.4%
Chemists, Toiletries & Health	2	3.6%	2.9%
Department Stores & Mail Order	0	0.0%	0.3%
Discount & Surplus Stores	1	1.8%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	1	1.8%	1.3%
Electrical Goods & Home Entertainment	1	1.8%	3.2%
Fashion & General Clothing	4	7.1%	3.7%
Florists & Garden	1	1.8%	1.1%
Footwear	0	0.0%	0.8%

Furniture, Carpets, Textiles, Bathrooms & Kitchens	2	3.6%	4.0%
Gifts, China & Leather Goods	1	1.8%	4.0%
Jewellers, Clocks & Watches	0	0.0%	0.7%
Pet Shops & Pet Supplies	1	1.8%	0.9%
Sports, Toys, Cycle Shops & Hobbies	1	1.8%	1.5%

Representation Convenience

Compared to the Powys average, Builth Wells centre has a similar proportion of convenience shops (10%). All of the convenience categories are represented in the centre apart from two categories – off licences and petrol filling stations. The centre provides a marginally higher proportion of bakery, confectionery and groceries than the Powys average.

Table 49: Builth Wells breakdown of convenience units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Convenience	6	10.7%	10.2%
Bakers	1	1.8%	1.5%
Butchers & Fishmongers	1	1.8%	2.0%
Confectionery, Tobacco, Newsagents	1	1.8%	1.6%
Groceries, Supermarkets & Food Shops	3	5.4%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	0	0.0%	0.3%

Representation Leisure

Compared to the Powys average, Builth Wells centre has a significantly higher proportion of leisure units (32%). The centre provides a significantly higher proportion of bars, pubs and clubs and accommodation. The centre includes the regionally important Wyeside Arts Centre (entertainment).

Table 50: Builth Wells breakdown of leisure units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Leisure	18	32.1%	25.4%
Accommodation	3	5.4%	3.1%
Bars, Pubs & Clubs	7	12.5%	6.5%

Cafes & Fast Food	5	8.9%	10.4%
Entertainment	1	1.8%	1.9%
Restaurants	2	3.6%	3.6%

Representation Services

Compared to the Powys average, Builth Wells centre has a lower proportion of services (21%). Of all the categories represented the centre is noticeably above average for estate agents and auctioneers and below average for banks and financial services and hairdressing health and beauty.

Table 51: Builth Wells breakdown of service units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Service	12	21.4%	26.7%
Auto & Accessories	0	0.0%	0.3%
Auto Services	0	0.0%	0.4%
Banks, Financial Services & Building Societies	1	1.8%	3.2%
Employment & Post Offices	1	1.8%	1.6%
Estate Agents & Auctioneers	3	5.4%	4.1%
Hairdressing, Health & Beauty	5	8.9%	12.9%
Household & Home	1	1.8%	0.3%
Launderettes, Dry Cleaners & Other	0	0.0%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	0	0.0%	0.4%
Miscellaneous	0	0.0%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	0	0.0%	0.4%

Representation Largest All Categories & Independent/Multiple

Across all categories, the largest number of business units are in leisure and service uses with fashion and clothing the largest comparison category.

Table 52: Builth Wells top five categories (does not include vacant units)

Category of business	Number of business units	Proportion of town centre units
Bars, Pubs & Clubs	7	12.5%
Cafes & Fast Food	5	8.9%

Hairdressing, Health & Beauty	5	8.9%
Fashion & General Clothing	4	7.1%
Charity & Second-hand Shops	3	5.4%

A breakdown on independent and multiple businesses shows Builth Wells has an average in comparison to Powys and is significantly more independent than the Wales average.

Table 53: Builth Wells independent & multiple business units

	Number of occupied business units	Proportion of occupied business units	Powys Average	Wales CLG Average
Independent	45	80%	80%	67%
Multiple	11	20%	20%	32%

Vacancy

There were just seven small vacant retail units within Builth Wells at the time of the survey which is marginally higher than in 2012 although resulting in a vacancy rate well below the Welsh average in terms of proportion of units. The vacant units are located mainly within the High Street and include edge of centre locations such as West Street. The survey data include the former garage on Castle Street although currently occupied by the community transport service.

Table 54: Builth Wells vacancy

Type of unit	Number of business units	% of business units	Wales CLG Average
Occupied	56	89%	84%
Vacant	7	11%	16%
Total	63		

Environmental Quality & Character

Much of the centre's character is a reminder of its Victorian and Edwardian heyday as a spa resort with substantial and attractive buildings that were originally developed as hotels, guests houses and shops.

The commercial area is concentrated along Broad Street and High Steet creating a long narrow street with constricted pavements areas. The quality of the shopping environment is diminished by the dominance of the trunk road and moving traffic

through the centre. The road connects Builth Wells with west Wales and directs large volumes of traffic through the centre as part of a one-way gyratory system. The pedestrian environment and junction arrangement at Castle Street/The Strand is particularly challenging and essentially isolates the Wyeside Arts Centre from the rest of the town centre.

Summary of Builth Wells' Strengths and Weaknesses

Builth Wells has a good range and choice of mainly independent retailers which suggests it remains one of the main comparison shopping and leisure destinations in mid Powys. The centre provides a good range of service facilities and uses, complementary to its main shopping role, including leisure and entertainment facilities. The rate of vacant units suggests that the demand for premises remains strong, although there is a limited supply of premises available to accommodate new mainly small independent operators.

Food and grocery provision in the centre is only suitable for top up food shopping with main food shopping available outside of the town centre in the Co-op supermarket. Although the centre does not offer the same quality and range of facilities available in larger centres such as Newtown and Welshpool, Builth Wells clearly provides a wider retail and services role reflecting the town's importance as a regional agricultural centre and can be considered to be at a similar level in the hierarchy as nearby Llandrindod Wells.

- The number of units located in the town centre is high and has remained stable over the last ten years (63).
- Higher levels of occupation comparison, convenience and leisure units than the Welsh average.
- The centre provides a significantly higher proportion of fashion and clothing than the Powys average.
- The centre provides a marginally higher proportion of bakers, confectionary stores, and groceries than the Powys average.
- A significantly higher proportion of leisure units (32%) compared to the Powys average including higher proportion of bars, pubs and clubs and accommodation. The centre includes the regionally important Wyeside Arts Centre.
- Lower proportion of services (21%) compared with Powys although noticeably above average for estate agents and auctioneers.
- Builth Wells has an average number of independent shops in comparison to Powys and is significantly more independent than the Wales average.
- A vacancy rate well below the Welsh average in terms of proportion of units.

- High environmental quality reflecting its Victorian and Edwardian spa resort heritage. However, the quality of the shopping environment is diminished by the dominance of the trunk road and moving traffic through the centre.

Whilst currently designated as an 'District Retail Centre' in the adopted LDP, Builth Wells town centre is identified as one of the 'Primary Towns' in the proposed retail hierarchy. This reflects its role and function in serving the retail, service and leisure needs of residents and a wide rural catchment that is reinforced by the important regional agricultural role of the town. The town centre also has an established and diverse range of commercial, service provision and community use and activities.

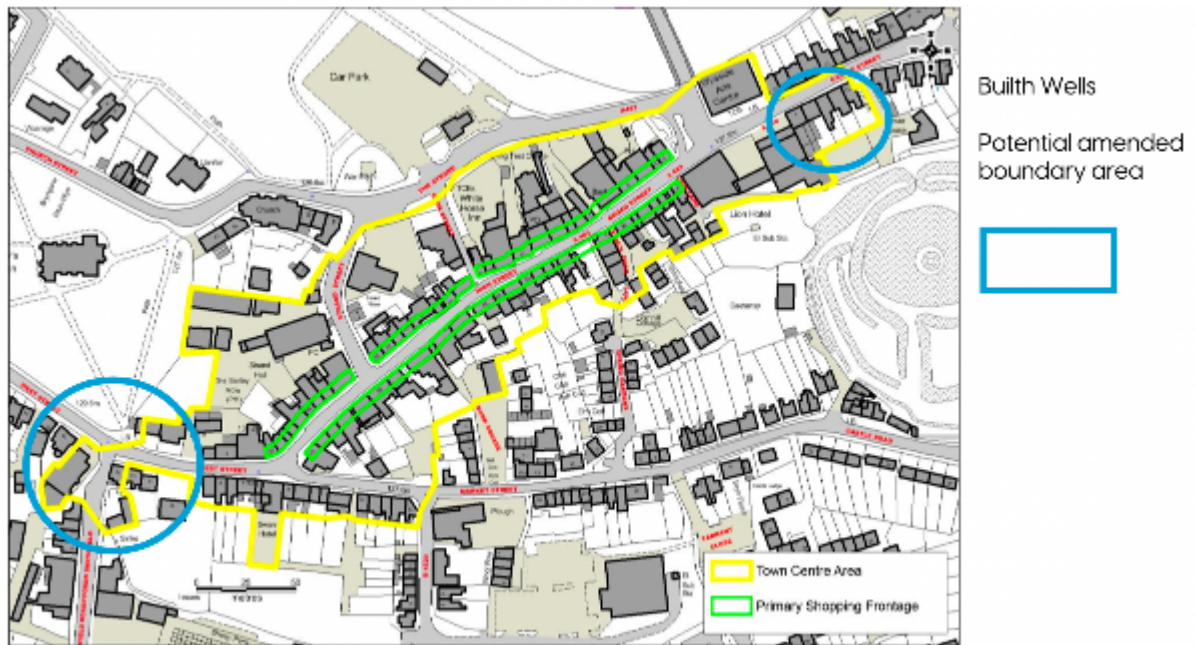
Town Centre Boundary

Vacancy rates are not particularly high or concentrated in one area of the defined town centre, although there are fringe areas that no longer perform a commercial function or contribute towards the health of the centre culturally or through a community activity. Although the current town centre boundary could be amended to remove the areas shown in the following Figure, the town centre's future growth and regeneration is also constrained by the flood risk to the north and the road network and accessibility to the south.

It therefore make sense to keep the current boundary to allow the town centre scope to grow and respond to the town centre first opportunities. There's limited potential to expand the boundary to consider the multi-functional nature of town centres. Options include:

- The Library and offices at Antur Gwy located on Park Road - although the area is significantly separated from the town centre by St Mary's Church.
- Carpark and former TIC building at The Gro although this area experiences high levels of flood risk and is constrained from development.

Figure 11: Builth Wells Potential amended town centre boundary



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Knighton

Knighton is classified as an 'District Retail Centre' in the adopted Powys LDP. These provide significant retail facilities for their immediate hinterlands and for visitors to the area but do not perform the wider role of Area Retail Centres. Knighton is located to the east of mid Powys, close to the centre of Presteigne and equidistance between Ludlow (Shropshire) and Llandrindod Wells.

The key roles of Knighton include:

- Convenience shopping: within the centre there is a Premier and Costcutters convenience stores accompanied by a bakers and butcher.
- Comparison shopping: offers few national multiple retailers including Boots as well as a larger number of independent retailers. There is a particular concentration of comparison retail units located around the clock tower;
- Services: provides an average range of services for its level in the hierarchy including, cafe's, takeaways, hairdressers, and estate agents. Since 2012 the centre has lost its post office (relocated to the edge of town Co-op) and high street banks.
- Leisure: includes numerous pubs; hotel and museum.
- Community facilities: these are located just outside of the centre including a doctor's surgery, library and advice centres.

Mix of Uses and Occupier Representation

Knighton has a total of 39 retail/service uses which is below the level recorded in 2012. The centre has a significantly higher proportion of occupied comparison, convenience and leisure units than the Welsh averages. However, the number of vacant premises are significantly below national average in terms of percentage of units.

Table 55: Knighton use by unit

Type of business	Number of businesses	% of total businesses
Comparison	14	35.9%
Convenience	3	7.7%
Leisure	10	25.6%
Miscellaneous	0	0.0%
Service	10	25.6%
Vacant	2	5.1%

Table 56: Knighton by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales CLG Average
Comparison	37.8%	29.3%
Convenience	8.1%	4.3%
Leisure	27.0%	25.6%
Miscellaneous	0.0%	9.0%
Service	27.0%	31.8%

Representation Comparison

Compared to the Powys average, the centre has a marginally higher level of comparison shops (38%), however six categories are not represented in the centre including – car showroom, discount stores, fashion/clothing, footwear, jewellery and pets. The centre provides a significantly higher amount of book, arts and crafts.

Table 57: Knighton breakdown of comparison units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Comparison	14	37.8%	35.4%
Books, Arts & Crafts, Stationery, Printers	3	8.1%	5.1%
Car & Motorbike Showrooms	0	0.0%	0.8%
Charity & Second-hand Shops	1	2.7%	4.5%
Chemists, Toiletries & Health	1	2.7%	3.0%
Department Stores & Mail Order	1	2.7%	0.3%
Discount & Surplus Stores	0	0.0%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	1	2.7%	1.3%
Electrical Goods & Home Entertainment	2	5.4%	3.2%
Fashion & General Clothing	0	0.0%	3.6%
Florists & Garden	1	2.7%	1.1%
Footwear	0	0.0%	0.8%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	1	2.7%	3.9%
Gifts, China & Leather Goods	2	5.4%	4.0%
Jewellers, Clocks & Watches	0	0.0%	0.7%
Pet Shops & Pet Supplies	0	0.0%	0.9%
Sports, Toys, Cycle Shops & Hobbies	1	2.7%	1.5%

Representation Convenience

Compared to the Powys average, the centre has a smaller proportion and range of convenience shops (8%). The centre provides a marginally higher proportion of grocery, supermarkets and food shops than the Powys average. Although the data does not identify a bakery unit, the centre is served by the instore Costcutters bakery.

Table 58: Knighton breakdown of convenience units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Convenience	3	8.1%	10.1%
Bakers	0	0.0%	1.5%
Butchers & Fishmongers	1	2.7%	2.0%
Confectionery, Tobacco, Newsagents	0	0.0%	1.5%
Groceries, Supermarkets & Food Shops	2	5.4%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	0	0.0%	0.3%

Representation Leisure

Compared to the Powys average, the centre has a higher proportion of leisure units (27%) across most categories. Whilst there is a museum (entertainment) and a large proportion of pubs, restaurants are notably absent.

Table 59: Knighton breakdown of leisure units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Leisure	10	27.0%	25.0%
Accommodation	1	2.7%	2.6%
Bars, Pubs & Clubs	4	10.8%	6.6%
Cafes & Fast Food	4	10.8%	10.3%
Entertainment	1	2.7%	1.9%
Restaurants	0	0.0%	3.6%

Representation Services

Compared to the Powys average, the centre has the same proportion of services (27%). Of all the categories represented the centre is noticeably above average for estate agents and auctioneers and has a high proportion of hairdressing and beauty.

Table 60: Knighton breakdown of service units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Service	10	27.0%	27.0%
Auto & Accessories	0	0.0%	0.3%
Auto Services	0	0.0%	0.4%
Banks, Financial Services & Building Societies	0	0.0%	3.2%
Employment & Post Offices	0	0.0%	1.6%
Estate Agents & Auctioneers	2	5.4%	4.2%
Hairdressing, Health & Beauty	5	13.5%	13.1%
Household & Home	0	0.0%	0.3%
Launderettes, Dry Cleaners & Other	0	0.0%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	1	2.7%	0.3%
Miscellaneous	0	0.0%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	0	0.0%	0.4%

Representation Largest All Categories & Independent/Multiple

Across all categories, the largest number of business units are in leisure and service with hairdressing and beauty, pubs and cafes the largest overall category.

Table 61: Knighton top five categories (does not include vacant units)

Category of business	Number of businesses	Proportion of town centre units
Hairdressing, Health & Beauty	5	13%
Bars, Pubs & Clubs	4	10%
Cafes & Fast Food	4	10%
Books, Arts & Crafts, Stationery, Printers	3	8%

Electrical Goods & Home Entertainment	2	5%
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A breakdown on independent and multiple businesses shows the centre is marginally less independent than the average for Powys and significantly more independent than the Wales average.

Table 62: Knighton independent & multiple business units

	Number of occupied business units	Proportion of occupied business units	Powys average	Wales CLG Average
Independent	29	78%	79%	67%
Multiple	8	22%	21%	33%

Vacancy

There were two vacant retail units within town centre at the time of the survey which is lower than in 2012 and resulting in a vacancy rate significantly lower than the Powys and Welsh average. The vacant units are distributed throughout the centre without any major concentrations.

Table 63: Knighton vacancy

Type of unit	Number of business units	% of business units	Wales CLG Average	Powys average
Occupied	37	95%	84%	89%
Vacant	2	5%	16%	11%
Total	39			

Environmental Quality & Character

The centre has an attractive and historic rural market town character focused on Broad Street, High Street and the centrepiece clocktower. There are several attractive historic buildings and frontages and interesting features including the narrow cobbled High Street area. The quality of the pedestrian environment is mixed with shoppers competing for space with through traffic and parking around the clocktower.

Summary of Knighton's Strengths and Weaknesses

The centre has a basic range of shops and services which serve the day to day needs of local residents and a number of specialist independents and the museum that have wider appeal to visitors. The centre has lost and now lacks the essential services such as a Post Office and bank, although the library, a doctor's surgery are located nearby but out of centre.

- The number of units located in the town centre has declined slightly over the last ten years.
- Higher levels of occupation in comparison units than the Powys with a significantly higher amount of book, and arts and crafts.
- Food and grocery provision in the centre is suitable for local top up food shopping and includes a butchers and the Costcutters provides an inhouse bakers. The out of centre Co-op provides for main food shopping.
- The leisure offer is larger than the Powys average and benefits from the presence of a museum and several pubs and cafes.
- Across all categories, the largest number of business units are in leisure and services uses with hairdressing and beauty the largest overall category.
- The centre has very good public transport accessibility, and provides a good level of car parking for shoppers.
- Vacancy rate lower than the Powys and Welsh average.
- There is a limited supply of premises available to accommodate new operators looking to trade in Knighton.
- The centre does not offer the same quality and range of facilities available in nearby larger centres.
- The centre provides a smaller range of services and no longer has a bank or post office.
- Lacks diversity with community facilities including the library located just outside of the centre.

Whilst currently designated as an 'District Retail Centre' in the adopted LDP, town centre is identified as one of the 'Secondary Towns' in the proposed retail hierarchy. This reflects its role and function in serving the retail, service and leisure needs of local residents and immediate hinterlands area based on an established and basic range of commercial, service, supermarket provision and community uses and activities.

Town Centre Boundary

Knighton's defined town centre is compact and encompasses the town's main shopping and services. Vacancy rates are low and not concentrated in any one area, however, at its fringe the town centre commercial role diminishes and there

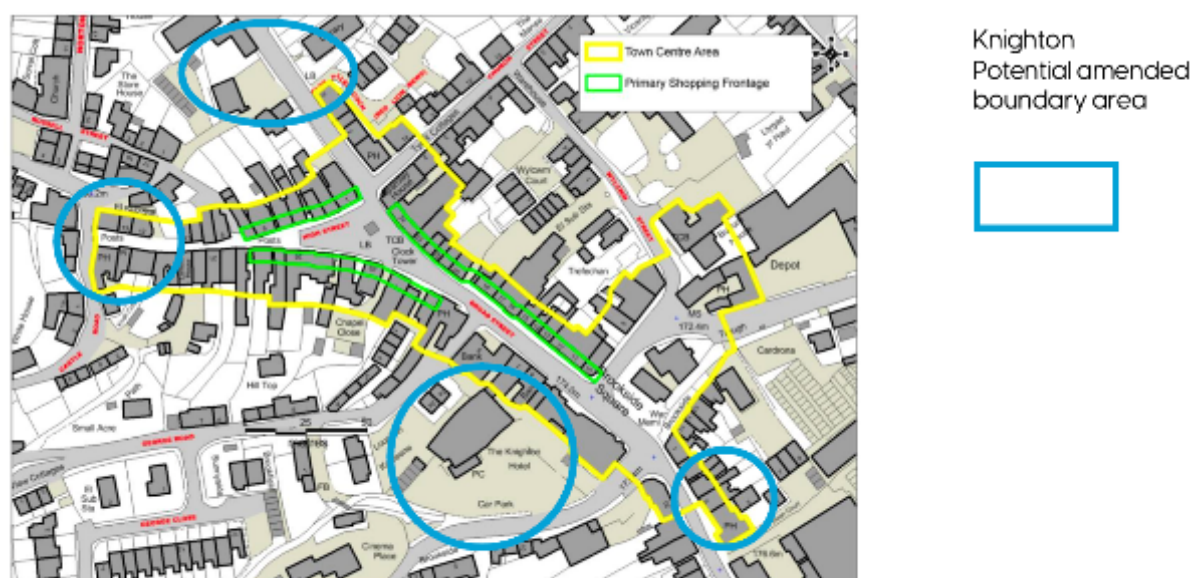
are two areas that are mostly residential and no longer contribute to the functional commercial centre. The town area provide future flexibility within the centre for new uses but also provide opportunities to tighten the boundary.

- The area of High Street between Russell Street and Castle Road is mainly residential.
- Frontage along Bridge Street diminished as a commercial area and mainly residential.

In addition, there are areas adjacent to the centre that contribute to the multifunctional nature of Knighton that could be added to the centre whilst maintaining the compactness of the town centre:

- Larkey Lane Car park and public toilets;
- West Street/Victoria Road – Library Home Furniture and Market Garden.

Figure 12: Knighton potential amended town centre boundary



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Presteigne Health Check

Presteigne is classified as an 'District Retail Centre' in the adopted Powys LDP. These provide significant retail facilities for their immediate hinterlands and for visitors to the area but do not perform the wider role of Area Retail Centres. Presteigne is located to the south of Knighton and helps serve the catchment of mid Powys. The centre is also situated equidistance from much larger centres - Builth Wells, Ludlow (Shropshire) and Hereford (Herefordshire).

The key roles of Presteigne include:

- Convenience shopping: Premier and Spar convenience stores are supported by a range of smaller units including newsagents, bakers, butchers, off-licence, grocers and delicatessens.
- Comparison shopping: there are no national comparison multiple retailers within Presteigne but there is a small range of independent retailers. The comparison retailers are spread throughout the centre.
- Services: provides a range of services including a post-office, high-street bank, cafes, takeaways, hairdressers, estate agents, and hair and beauty;
- Community and leisure: including a number of pubs. The Assembly Rooms provide a ground floor library and upstairs is venue for events including film showings, and concerts.

Mix of Uses and Occupier Representation

Presteigne has a total of 27 retail/service uses which is below the level recorded in 2012. The centre has a significantly higher proportion of occupied comparison, convenience and leisure units than the Welsh averages. The proportion of convenience units is notably higher compared with both the Wales and Powys averages.

Table 64: Presteigne use by unit

Type of business	Number of businesses	% of total businesses
Comparison	9	33.3%
Convenience	5	18.5%
Leisure	7	25.9%
Miscellaneous	0	0.0%
Service	5	18.5%
Vacant	1	3.7%

Table 65: Presteigne by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales Average	CLG	Powys Average
Comparison	34.6%	29.3%		35.4%
Convenience	19.2%	4.3%		10.1%
Leisure	26.9%	25.6%		25.0%
Miscellaneous	0.0%	9.0%		2.5%
Service	19.2%	31.8%		27.0%

Representation Comparison

Compared to the Powys average, the centre has a similar level of comparison shops (35%), however there's a lack of diversity with eleven categories not represented in the centre including – DIY, electrical, fashion/clothing, footwear, jewellery and pets. The centre provides a significantly higher amount of book, arts and crafts, and is the largest overall category.

Table 66: Presteigne breakdown of comparison units

Category of business (organised by type – in bold)	Number of businesses	Proportion of town centre units	Powys average
Comparison	9	34.6%	35.4%
Books, Arts & Crafts, Stationery, Printers	3	11.5%	5.1%
Car & Motorbike Showrooms	0	0.0%	0.8%
Charity & Second-hand Shops	2	7.7%	4.5%
Chemists, Toiletries & Health	1	3.8%	3.0%
Department Stores & Mail Order	0	0.0%	0.3%
Discount & Surplus Stores	0	0.0%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	0	0.0%	1.3%
Electrical Goods & Home Entertainment	0	0.0%	3.2%
Fashion & General Clothing	0	0.0%	3.6%
Florists & Garden	0	0.0%	1.1%
Footwear	0	0.0%	0.8%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	1	3.8%	3.9%
Gifts, China & Leather Goods	2	7.7%	4.0%
Jewellers, Clocks & Watches	0	0.0%	0.7%
Pet Shops & Pet Supplies	0	0.0%	0.9%

Sports, Toys, Cycle Shops & Hobbies	0	0.0%	15%
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Representation Convenience

Compared to the Powys average, the centre has a significantly higher proportion and range of convenience shops (19%). The centre provides a much higher proportion of grocery, supermarkets and food shops than the Powys average.

Table 67: Presteigne breakdown of convenience units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Convenience	5	19.2%	10.1%
Bakers	0	0.0%	15%
Butchers & Fishmongers	1	3.8%	2.0%
Confectionery, Tobacco, Newsagents	0	0.0%	1.5%
Groceries, Supermarkets & Food Shops	4	15.4%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	0	0.0%	0.3%

Representation Leisure

Compared to the Powys average, the centre has a similar proportion of leisure units (27%) across most categories. The proportion of pubs is lower than the Powys average, however cafes and restaurants are notably higher. The entertainment uses (cinema and concerts) held at the Assembly Rooms have not been picked up in the study because they are located on upper floor uses.

Table 68: Presteigne breakdown of leisure units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Leisure	7	26.9%	25.0%
Accommodation	0	0.0%	2.6%
Bars, Pubs & Clubs	1	3.8%	6.6%
Cafes & Fast Food	3	11.5%	10.3%
Entertainment	0	0.0%	1.9%
Restaurants	3	11.5%	3.6%

Representation Services

Compared to the Powys average, the centre has a significantly smaller proportion of services (19%) as would be expected with a smaller centre. Despite the District Centre status, the centre has also retained a high street bank.

Table 69: Presteigne breakdown of service units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Service	5	19.2%	27.0%
Auto & Accessories	0	0.0%	0.3%
Auto Services	0	0.0%	0.4%
Banks, Financial Services & Building Societies	1	3.8%	3.2%
Employment & Post Offices	1	3.8%	1.6%
Estate Agents & Auctioneers	1	3.8%	4.2%
Hairdressing, Health & Beauty	2	7.7%	13.1%
Household & Home	0	0.0%	0.3%
Launderettes, Dry Cleaners & Other	0	0.0%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	0	0.0%	0.3%
Miscellaneous	0	0.0%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	0	0.0%	0.4%

Representation Largest All Categories & Independent/Multiple

Across all categories, the largest number of business units are spread across convenience, comparison and leisure, with grocery and food shops the largest overall category.

Table 70: Presteigne top five categories (does not include vacant units)

Category of business	Number of businesses	Proportion of town centre units
Groceries, Supermarkets & Food Shops	4	15.4%
Books, Arts & Crafts, Stationery, Printers	3	11.5%
Cafes & Fast Food	3	11.5%
Restaurants	3	11.5%

Charity & Second-hand Shops	2	7.7%
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A breakdown on independent and multiple businesses shows the centre is marginally less independent than the average for Powys and significantly more independent than the Wales average.

Table 71: Presteigne independent & multiple business units

	Number of businesses	Proportion of businesses	Powys average	Wales CLG Average
Independent	20	77%	79%	67%
Multiple	6	23%	21%	33%

Vacancy

There was one vacant retail units within town centre at the time of the survey which is lower than in 2012 and resulting in a vacancy rate significantly lower than the Powys and Welsh average. There are several units located at the edge of the centre at High Street/St David's Road and Hereford Street/Station Road that no longer appear to be lettable floorspace that therefore haven't been included in the vacancy figure.

Table 72: Presteigne Vacancy

Type of unit	Number of business units	% of business units	Wales CLG Average	Powys average
Occupied	26	96%	84%	89%
Vacant	1	4%	16%	11%
Total	27			

Environmental Quality & Character

The town centre benefits from its compact nature and attractive high quality heritage, historic buildings and street frontages. The centre is focused on Broad Street and High Street and the centrepiece Assembly Rooms. The quality of the pedestrian environment is mixed with a combination of narrow High Street with narrow pavement and more generously proportioned Broad Street although the movement of traffic through the centre doesn't appear to significantly diminish the overall environment.

Summary of Presteigne Strengths and Weaknesses

The centre offers both a basic range of shops and services which serve the day to day needs of local residents and several specialists and high quality independents and the museum that have wider appeal to visitors. The centre has retained its Post Office, a bank and library providing many essential community facilities and services.

- Presteigne has a good range of shops and services which serve the day to day needs of local residents.
- Food and grocery provision in the centre is strong but mainly suitable for top up food shopping. The two convenience stores are supplemented with an impressive range of smaller convenience units.
- The centres services cover important essential for the local community.
- Complementary uses to its main shopping role, including leisure and entertainment facilities.
- The vacancy rate is significantly lower than the Powys and Wales average.
- The centre has a good provision of car parking for shoppers.
- A historic centre with a good quality streetscape and environment.
- The centre has a similar proportion of comparison retail units compared with the Powys average, although it lacks diversity with eleven of the comparison retailer categories are not represented.
- There is a limited supply of premises available to accommodate new operators looking to trade in Presteigne.

Whilst currently designated as an 'District Retail Centre' in the adopted LDP, town centre is identified as one of the 'Secondary Towns' in the proposed retail hierarchy. This reflects its role and function in serving the retail, service and leisure needs of local residents and immediate hinterlands area based on an established and basic range of commercial, service, supermarket provision and community uses and activities.

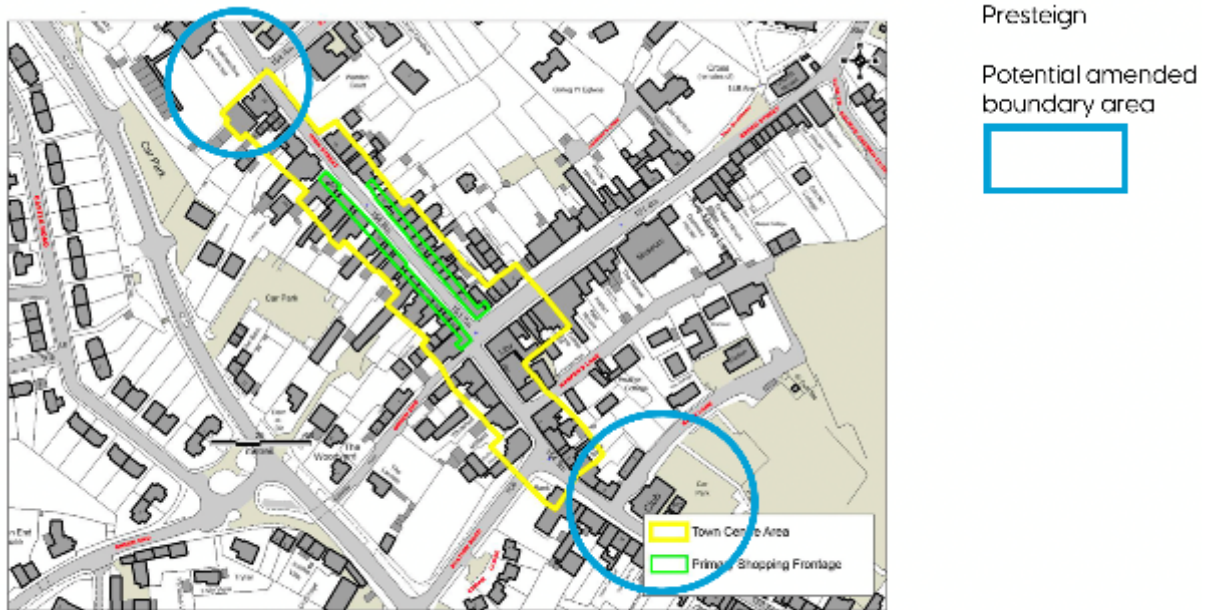
Town Centre Boundary

The town centre boundary encompasses the main shopping/commercial areas of the town. Whilst at the edge the commercial role diminishes, there are also opportunities to extend to include uses that contribute to the multifunctional nature and overall diversity of the centre. Options include:

- Hereford Street / Black Lane including The Royal British Legion, Car Park and Youth Centre
- High Street including Radnorshire Arms and the Cabin (takeaway)

Broad Street, between the defined town centre and the Judges Lodgings, is primarily residential in nature and therefore probably too detached to recommend including the museum within the centre.

Figure 13: Presteigne potential amended town centre boundary



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Rhayader Health Check

Rhayader is classified as a 'District Retail Centre' in the retail hierarchy of the adopted LDP. The town is located 15km north-west of Llandrindod Wells and 20km south of Llanidloes, and as such serves a mid-Powys catchment. The centre has a variety of retail and service uses. The key roles of Rhayader include:

- Convenience shopping: Located within the centre are convenience stores (including a Co-op), an independent newsagent, butcher and a Texaco petrol station.
- Comparison shopping: A variety of comparison retailers are in the town centre, including four car and motorbike dealerships, electrical good stores, a hardware store and health food store. Comparison retailers in the centre are largely independent.
- Services: The centre provides a good range of services with three hairdressers, three estate agents, a laundrette, financial advisors, funeral director, and beauty salon.
- Leisure: Largely independent range of leisure businesses with the only multiple being The Crown Inn (an SA Brains public house). Leisure businesses in the town centre include public houses, takeaways, hotels and a cafe. Beyond the defined town centre are a number of accommodation businesses serving visitors to the town and nearby Elan Valley, a leisure centre and The Lost ARC, a community-run art centre and venue.
- Community facilities: A range of community services are accessible outside the town centre including a library, community hall and as previously mentioned a leisure centre and The Lost ARC. In the town centre Rhayader & District Community Support run a community shop.

There are no significant out-of-town retail facilities in Rhayader.

Mix of Uses and Occupier Representation

Rhayader has a total of 41 retail and service uses (excluding non-retail Class A uses) which is seven less than recorded in 2012 (48 units); this may be accounted for in part by differences in survey method. The centre has no units classified as vacant in 2022 and has a higher proportion of occupied convenience and comparison units than the Wales and Powys average.

The proportion of units classified as service is lower than the Wales and Powys average whilst the proportion of leisure units is broadly in line with the Wales and Powys average in terms of percentage of units.

Table 73: Rhayader use by unit

Type of business	Number of business units	% of total business units
Comparison	16	39.0%
Convenience	5	12.2%
Leisure	10	24.4%
Miscellaneous	0	0.0%
Service	10	24.4%
Vacant	0	0.0%

Table 74: Rhayader by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales Average	CLG	Powys Average
Comparison	39.0%	29.3%		35.2%
Convenience	12.2%	4.3%		10.2%
Leisure	24.4%	25.6%		25.4%
Miscellaneous	0.0%	9.0%		2.5%
Service	24.4%	31.8%		26.7%

Representation Comparison

Comparison retailers occupy the largest proportion of the town centre units (39% of units) and are largely independent. The proportion of comparison business units is 10% higher than the national average and 4% higher than the Powys average. There are a relatively high number of specialist retailers including three motorbike dealerships, a car dealership, florist and two electrical goods stores.

Most categories of comparison businesses are represented and broadly in line with the Powys average, with the notable exception of car and motorbike dealerships which are ten times the Powys average. Charity shops are underrepresented relative to the Powys average, with only a single store in the centre, and there are no furniture, carpets, textiles, bathrooms & kitchen stores.

Table 75: Rhayader breakdown of comparison units (does not include vacant units)

Category of business (organised by type – in bold)	Number of businesses	Proportion of town centre units	Powys average
Comparison	16	39.0%	35.2%
Books, Arts & Crafts, Stationery, Printers	2	4.9%	5.2%
Car & Motorbike Showrooms	4	9.8%	0.8%

Charity & Second-hand Shops	1	2.4%	4.4%
Chemists, Toiletries & Health	2	4.9%	2.9%
Department Stores & Mail Order	0	0.0%	0.3%
Discount & Surplus Stores	0	0.0%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	1	2.4%	1.3%
Electrical Goods & Home Entertainment	2	4.9%	3.2%
Fashion & General Clothing	1	2.4%	3.7%
Florists & Garden	1	2.4%	1.1%
Footwear	0	0.0%	0.8%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	0	0.0%	4.0%
Gifts, China & Leather Goods	2	4.9%	4.0%
Jewellers, Clocks & Watches	0	0.0%	0.7%
Pet Shops & Pet Supplies	0	0.0%	0.9%
Sports, Toys, Cycle Shops & Hobbies	0	0.0%	1.5%

Representation Convenience

The Co-op, located on East Street is the town main's convenience store selling groceries and household goods (the unit was not recorded in the Local Data Company survey data). Five units are categorised as convenience, 12% of town centre units, which is line with the Powys average but close to double the Wales average. The majority of these units are multiples with two recorded convenience stores (Best-one and Spar), a Co-op, and a Texaco petrol station. In addition, there is an independent newsagent (Powell Newsagents) and butcher (Watsons Family Butchers).

Table 76: Rhayader breakdown of convenience units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Convenience	5	12.2%	10.2%
Bakers	0	0.0%	1.5%
Butchers & Fishmongers	1	2.4%	2.0%
Confectionery, Tobacco, Newsagents	1	2.4%	1.6%
Groceries, Supermarkets & Food Shops	2	4.9%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	1	2.4%	0.3%

Representation Leisure

Leisure units represent 24% of town centre units, which is in line with the Powys and national averages. Each category of leisure business is represented in the town centre broadly in line with the Powys average, with the exception of entertainment. There are no recorded entertainment uses within the town centre boundary, such as a museum, art gallery or event venue.

A significant portion of the town's leisure offer lies beyond the town centre boundary, such as The Lost ARC a community-run live events venue, arts centre and cafe located 200m to the west of the town centre. A Victorian House Museum, bike shop and Pump Track Wales (a cycling facility) are also located west of the town centre boundary. In addition, Rhayader Leisure Centre is located on North Street opposite the market on the edge of the town centre and features a swimming pool and gym.

Table 77: Rhayader breakdown of leisure units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Leisure	10	24.4%	25.4%
Accommodation	2	4.9%	3.1%
Bars, Pubs & Clubs	3	7.3%	6.5%
Cafes & Fast Food	4	9.8%	10.4%
Entertainment	0	0.0%	1.9%
Restaurants	1	2.4%	3.6%

Representation Services

The proportion of service units is broadly in line with the Powys average at 24%. Compared to the Powys average, Rhayader has a marginally higher proportion of service units with an above average proportion of estate agents, banks, clothing alteration stores and travel agents.

The proportion of hairdressing, health and beauty stores is marginally lower than the Powys average. There is also no auto store, household shop, post office, laundrette or pawnbroker within the defined town centre.

Table 78: Rhayader breakdown of service units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Service	10	24.4%	26.7%
Auto & Accessories	0	0.0%	0.3%
Auto Services	0	0.0%	0.4%
Banks, Financial Services & Building Societies	1	2.4%	3.2%
Employment & Post Offices	0	0.0%	1.6%
Estate Agents & Auctioneers	3	7.3%	4.1%
Hairdressing, Health & Beauty	4	9.8%	12.9%
Household & Home	0	0.0%	0.3%
Launderettes, Dry Cleaners & Other	1	2.4%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	0	0.0%	0.4%
Miscellaneous	0	0.0%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	0	0.0%	0.4%

Largest Categories & Independent/Multiple

The business categories occupying the largest number of units are primarily leisure and service businesses with the exception of car & motorbike showrooms (comparison retailers).

Table 79: Rhayader top five categories (does not include vacant units)

Category of business	Number of business units	Proportion of town centre units
Car & Motorbike Showrooms	4	9.8%
Cafes & Fast Food	4	9.8%
Hairdressing, Health & Beauty	4	9.8%
Bars, Pubs & Clubs	3	7.3%
Estate Agents & Auctioneers	3	7.3%

A breakdown on independent and multiple businesses in Rhayader shows that the vast majority are independent. This in line with the average for town centres across Powys.

Table 80: Rhayader independent & multiple business units

	Number of occupied business units	Proportion of occupied business units	Powys Average	Wales CLG Average
Independent	28	80%	80%	67%
Multiple	7	20%	20%	33%

Vacancy

There were no units recorded as vacant in 2022 in comparison with 18.8% in 2012, making Rhayader the largest centre (by number of units) without a vacancy in Powys. There are a small number of units which are under renovation and not occupied; these are not reflected in the Local Data Company data.

Table 81: Rhayader vacancy

Type of unit	Number of business units	% of business units	Wales CLG Average	Powys Average
Occupied	41	100%	84%	88%
Vacant	0	0%	16%	12%
Total	41			

Environmental Quality & Character

The town centre is of high environmental quality with the majority designated as a Conservation Area. The focal point of the town centre is the clock tower and war memorial at the crossroads of North, East, South and West Streets. The crossroads is surrounded by a series of historic buildings of which four are Grade II listed, including the clock tower. Older buildings in the town centre date to the late 17th century. The centre is characterised by examples of 19th and early 20th Century commercial buildings with attractive and well maintained frontages as well as a distinctive and varied streetscape.

The public realm is of mixed quality with limited space for pedestrians, particularly on South Street, leading to an environment dominated, at times, by heavy good vehicles and other through traffic. However, the overall appearance is generally good with historic frontages and quality independent retailers creating an attractive visitor destination.

Summary of Rhayader's Strengths and Weaknesses Strengths

The town centre has a very low vacancy rate, indicating that Rhayader is a high performing District Retail Centre.

The town centre has strong comparison retail provision with a number of specialist and boutique retailers; there is no out of town retail. Town centre comparison retail is complemented by an above average proportion of convenience businesses that cater for everyday needs. Comparison and convenience provision combine to serve both local and visitor needs. The town centre Co-op fulfils a top up food shopping role with main food shopping needs met in Llandrindod Wells and Builth Wells.

Within the defined boundaries of the town centre is a good range of leisure and service businesses. A weakness of the town centre is that a significant number of leisure businesses and facilities, such as the leisure centre and The Lost ARC, are located outside the existing boundary.

The number of units in the town centre has reduced by seven units since 2012, slightly more than 10%. This can likely be accounted for by differences in the survey method.

Whilst currently designated as an 'District Retail Centre' in the adopted LDP, town centre is identified as one of the 'Secondary Towns' in the proposed retail hierarchy. This reflects its role and function in serving the retail, service and leisure needs of local residents and immediate hinterlands area based on an established and basic range of commercial, service, supermarket provision and community uses and activities.

Town Centre Boundary

The existing town centre boundary covers the majority of the town's retail and service businesses and there are no recorded vacant units within the defined town centre. However, a number of businesses and facilities that are located in close proximity to the town centre are not included, particularly leisure businesses.

Options include:

- To the north of the boundary is the leisure centre and cattle market, both of which are immediately adjacent the existing boundary.
- To the south is a B&B, church, and a doctor's surgery located on Caerberbert Lane and South Street.

- To the east is The Bear, a hotel on East Street, which is opposite premises within the boundary but is currently located outside of the defined boundary.
- To the west are a cluster of business immediately adjacent the boundary including a hotel, public house, and bike shop as well as the town's library.

There is scope to expand the town centre boundary and include more businesses and facilities, particularly those directly adjacent the existing boundary, to take into account the multi-functional nature of the centre. An expanded town centre would showcase the centre's range of leisure businesses and facilities in particular.

Figure 14: Rhayader potential amended town centre boundary



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Ystradgynlais Health Check

Ystradgynlais is classified as a 'District Retail Centre' in the retail hierarchy of the adopted LDP. Ystradgynlais is the southernmost town in Powys. Ystradgynlais is located in the south of Powys adjacent to Neath Port Talbot CBC, is 10km north of Pontardawe, and serves a catchment of nearby centres including Ystalyfera.

The key roles of Ystradgynlais include:

- Convenience shopping: Located within the centre are two bakers (Greggs and Jenkins) and a convenience store (Best-one) as well as an independent mobile phone & vape store, deli, and butchers.
- Comparison shopping: All comparison retailers are independent and located around the cross roads, primarily extending along Commercial Street. There are a number of specialist retailers including a carpet shop, pet shop and a women's clothing store.
- Services: The centre provides a good range of services with hairdressers, a building society (Principality), optician, estate agent, barber, travel agent, clothing alteration store, photographer, a high street bank (Lloyds) and a post office close to the defined centre.
- Leisure: three takeaways, two cafes, and a public house.
- Community facilities: the majority are located outside of the centre including the library, community hall and cultural centre (The Welfare Hall), and a community centre as well as a community car scheme operating from a unit in the town centre.

To the south of the town centre, there is a Tesco superstore along with other stores and restaurants.

Mix of Uses and Occupier Representation

Ystradgynlais has a total of 35 retail and service uses (excluding non-retail Class A uses) which is around a third less than recorded in 2012 (49 units); this may be accounted by differences in the survey method.

The centre has a higher proportion of occupied convenience units than the national average. The proportion of units classified as leisure and miscellaneous is lower than the national average and the proportion of comparison units and services are broadly in line with the average in terms of percentage of units.

Table 82: Ystradgynlais use by unit

Type of business	Number of business units	% of total business units
Comparison	11	31.4%
Convenience	6	17.1%
Leisure	7	20.0%
Miscellaneous	1	2.9%
Service	10	28.6%
Vacant	0	0%

Table 83: Ystradgynlais by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales Average	CLG	Powys Average
Comparison	31.4%	29.3%		35.2%
Convenience	17.1%	4.3%		10.2%
Leisure	20.0%	25.6%		25.4%
Miscellaneous	2.9%	9.0%		2.5%
Service	28.6%	31.8%		26.7%

Representation Comparison

The proportion of comparison shops is lower than the Powys average but in line with the national average at 31% of town centre units. Comparison shops within the centre include gift shops, charity shops, a pet shop and two units classified as sports, toys, cycle shops & hobbies (significantly above the Powys average).

As a District Centre, not every category of comparison businesses is represented in the town centre, with no jewellers, electrical goods stores, books, arts & crafts, stationery, printers or bookshops.

Table 84: Ystradgynlais breakdown of comparison units

Category of business (organised by type – in bold)	Number of businesses	Proportion of town centre units	Powys average
Comparison	11	31.4%	35.2%
Books, Arts & Crafts, Stationery, Printers	0	0.0%	5.2%
Car & Motorbike Showrooms	0	0.0%	0.8%
Charity & Second-hand Shops	2	5.7%	4.4%

Chemists, Toiletries & Health	1	2.9%	2.9%
Department Stores & Mail Order	0	0.0%	0.3%
Discount & Surplus Stores	0	0.0%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	0	0.0%	1.3%
Electrical Goods & Home Entertainment	0	0.0%	3.2%
Fashion & General Clothing	2	5.7%	3.7%
Florists & Garden	0	0.0%	1.1%
Footwear	0	0.0%	0.8%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	1	2.9%	4.0%
Gifts, China & Leather Goods	2	5.7%	4.0%
Jewellers, Clocks & Watches	0	0.0%	0.7%
Pet Shops & Pet Supplies	1	2.9%	0.9%
Sports, Toys, Cycle Shops & Hobbies	2	5.7%	1.5%

Representation Convenience

Convenience shops represent 17% of town centre units which is close to double of the Powys and national averages, 10% and 9% respectively. This is due in large part to the two bakers (Greggs and Jenkins) and two groceries shop which combined represent more than 10% of town centre units. In addition, there is an independent butcher and a phone/vape shop. Notably there is no petrol station in the centre, unlike in 2012, with the nearest at the Tesco Superstore south of the town centre.

Table 85: Ystradgynlais breakdown of convenience units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Convenience	6	17.1%	10.2%
Bakers	2	5.7%	1.5%
Butchers & Fishmongers	1	2.9%	2.0%
Confectionery, Tobacco, Newsagents	1	2.9%	1.6%
Groceries, Supermarkets & Food Shops	2	5.7%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	0	0.0%	0.3%

Representation Leisure

Leisure units represent 20% of town centre units, which is around 5% less than the Powys and national averages of 25% and 26%. There are no units categorised as accommodation or restaurants. The category of bars, pubs & clubs is

underrepresented compared to the Powys average whilst the proportion of cafes and fast food units are higher than average.

Outside of the defined town centre, The Welfare Hall is a community and cultural centre with a cinema, theatre and art gallery – the facility is regionally important and attracts visitors from a wide catchment.

Table 86: Ystradgynlais breakdown of leisure units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Leisure	7	20.0%	25.4%
Accommodation	0	0.0%	3.1%
Bars, Pubs & Clubs	1	2.9%	6.5%
Cafes & Fast Food	5	14.3%	10.4%
Entertainment	1	2.9%	1.9%
Restaurants	0	0.0%	3.6%

Representation Services

Compared to the Powys average, Ystradgynlais has a marginally higher proportion of service units with an above average proportion of banks, financial services & building societies, clothing alteration stores and travel agents. The proportion of estate agents and hairdressing, health and beauty stores are marginally lower than the regional average. There is no auto store, household shop, post office, laundrette or pawnbroker within the defined town centre.

Table 87: Ystradgynlais breakdown of service units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Service	10	28.6%	26.7%
Auto & Accessories	0	0.0%	0.3%
Auto Services	0	0.0%	0.4%
Banks, Financial Services & Building Societies	2	5.7%	3.2%
Employment & Post Offices	0	0.0%	1.6%
Estate Agents & Auctioneers	1	2.9%	4.1%
Hairdressing, Health & Beauty	4	11.4%	12.9%
Household & Home	0	0.0%	0.3%

Launderettes, Dry Cleaners & Other	0	0.0%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	1	2.9%	0.4%
Miscellaneous	1	2.9%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	1	2.9%	0.4%

Representation Largest Categories & Independent/Multiple

The largest categories are in leisure (cafes and fast food) and services (hairdressing, health and beauty).

Table 88: Ystradgynlais top five categories (does not include vacant units)

Category of business	Number of business units	Proportion of town centre units
Cafes & Fast Food	5	14.3%
Hairdressing, Health & Beauty	4	11.4%
Charity & Second-hand Shops	2	5.7%
Fashion & General Clothing	2	5.7%
Gifts, China & Leather Goods	2	5.7%

A breakdown on independent and multiple businesses shows that the vast majority are independent, in line with other centres across Powys and significantly higher than the national average.

Table 89: Ystradgynlais independent & multiple business units

	Number of occupied business units	Proportion of occupied business units	Powys Average	Wales CLG Average
Independent	28	80%	80%	67%
Multiple	7	20%	20%	33%

Vacancy

There were no units recorded as vacant in 2022 in comparison with 6.1% in 2012. This is below both the national average of 16% and the Powys average of 11%.

It is likely that two units that are vacant and currently under renovation have not been picked up by the Local Data Company survey. In addition, since the time of

Local Data Company the survey there have been three reported shop closures as well as Lloyds announcing plans to close its Ystradgynlais branch later in the year.

Table 90: Ystradgynlais vacancy

Type of unit	Number of business units	% of business units	Wales CLG Average	Powys Average
Occupied	35	100%	84%	88%
Vacant	0	0%	16%	12%
Total	35			

Environmental Quality & Character

The centre reflects the town's heritage, as a former mining town with a large ironworks and its rural setting. Buildings in the town centre are typical of a post-industrial town in the region, with the vast majority terraced and two-storeys.

The commercial area is highly concentrated and focused on the crossroads of Heol Eglwys, Commercial Street, Brecon Road and Station Road with commercial uses primarily extending along Commercial Street and Station Road. The crossroads have reasonably wide pavements and bollards separate pedestrians from vehicles. Whilst there is a consistent flow of traffic, it is not detrimental to the quality of the public realm.

The public realm has a well-maintained appearance and interesting public realm with local organisations introducing murals celebrating the town's heritage, knitted items on street furniture and attractive planting schemes. However, the town centre does not have the historical charm found in the traditional market towns of Powys.

Summary of Ystradgynlais' Strengths and Weaknesses Strengths

Ystradgynlais has a good range of independent retailers and service businesses with a low vacancy rate, suggesting that it has retained and potentially strengthened its role as a District Retail Centre. The centre also has a strong provision of specialist independent comparison retailers with dedicated home stores, gift shops and clothing stores.

There is no supermarket in the town centre making it more suitable for top up food shopping with main food shopping largely met outside of the town centre at the Tesco Superstore and other supermarkets further south.

Whilst the opening of the Tesco Superstore was noted as a potential threat to the viability and vitality of the centre in 2012, it appears that the position and role of the

town centre has strengthened and developed since its opening. The number of units in the town centre has reduced since 2012 by around a third but this likely can be accounted for by differences in the survey method.

Whilst currently designated as an 'District Retail Centre' in the adopted LDP, town centre is identified as one of the 'Secondary Towns' in the proposed retail hierarchy. This reflects its role and function in serving the retail, service and leisure needs of local residents and immediate hinterlands area based on an established and basic range of commercial, service, supermarket provision and community uses and activities.

Town Centre Boundary

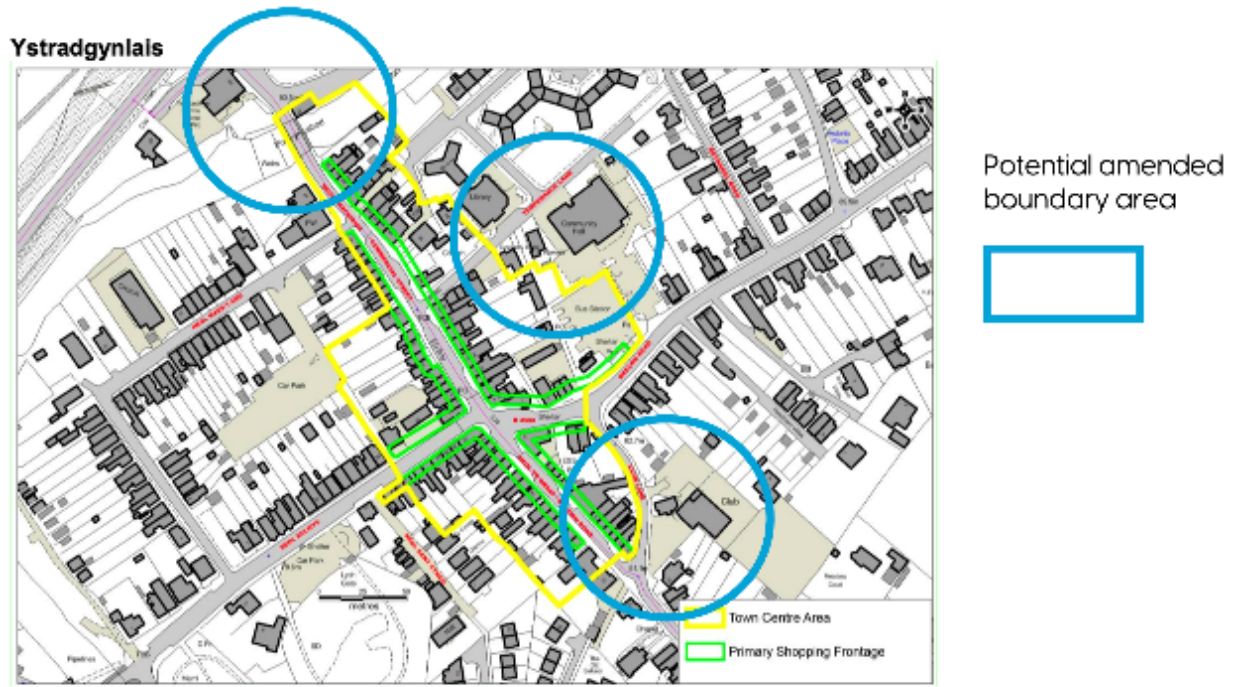
The existing town centre boundary covers the majority of the town's retail and service businesses. However, there are a number of businesses and facilities in close proximity that could be considered for inclusion within the boundary.

Options include:

- The Ynyscedwyn Arms, Penybont Inn, and the former Sardis Chapel (undergoing redevelopment into a cultural centre and art gallery dedicated to Josef Herman) which are located north of the existing boundary.
- The library and The Welfare Hall are important community facilities and located east of the existing boundary.
- The Constitutional Club located by the southern boundary of the town centre.

There is scope to expand the existing boundary to fully take into account the multi-functional nature of the centre, particularly its strong range of community and cultural facilities, and promote town centre regeneration through the incorporation of the former Sardis Chapel.

Figure 15: Ystradgynlais potential amended town centre boundary



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Llanfair Caereinion Health Check

Llanfair Caereinion is designated a 'Local Retail Centre' in the adopted LDP. Located adjacent to the A458 and 14km west of Welshpool, the centre serves a large rural hinterland based on a limited range of local retail and service uses interspersed alongside residential uses. The key roles of Llanfair Caereinion include:

- Convenience shopping: local convenience offer provided by Spar, Independent butchers and general stores.
- Comparison shopping: limited provision of facilities focused on vintage.
- Services: limited range of services but includes a post office, dental practice and hair salon.
- Leisure: provision orientated towards pubs and fish/chip takeaway.
- Community facilities: limited to the library and town council office at High Street. The medical practice is located at the fringe of the town centre boundary off Bridge Street.

Mix of Uses and Occupier Representation

The town centre was not assessed by the Local Data Company and is informed by a survey undertaken in January 2023. This identified a total of 15 retail and service units in Llanfair Caereinion (excluding non-retail Class A uses). Service and leisure uses represent the highest proportion of units in Llanfair Caereinion town centre which together account for over 70% of occupied units. Both use categories are higher than the Powys and Welsh average. The level of convenience units is also significantly higher compared to the county and national average with over 21% of occupied units supporting convenience retailers which confirm an important top up role and function. The level of comparison representation is limited and significantly lower than the Powys average. At the local level, Welshpool town centre acts as the closest destination for comparison and convenience needs.

Table 91: Llanfair Caereinion use by unit

Type of business	Number of business units	% of total business units
Comparison	1	6.7%
Convenience	3	20.0%
Leisure	4	26.7%
Miscellaneous	0	0.0%
Service	6	40.0%

Vacant	1	6.7%
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Table 92: Llanfair Caereinion by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales Average	CLG	Powys Average
Comparison	7.1%	29.3%		35.2%
Convenience	21.4%	4.3%		10.2%
Leisure	28.6%	25.6%		25.4%
Miscellaneous	0.0%	9.0%		2.5%
Service	42.9%	31.8%		26.7%

Representation Comparison

The level of comparison representation in Llanfair Caereinion town centre (7.1%) is low compared to the Powys average (35.2%) and limited to one unit selling vintage, retro and collectables.

Table 93: Llanfair Caereinion breakdown of comparison units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Comparison	1	7.1%	35.2%
Books, Arts & Crafts, Stationery, Printers	1	7.1%	5.2%
Car & Motorbike Showrooms	0	0.0%	0.8%
Charity & Second-hand Shops	0	0.0%	4.4%
Chemists, Toiletries & Health	0	0.0%	2.9%
Department Stores & Mail Order	0	0.0%	0.3%
Discount & Surplus Stores	0	0.0%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	0	0.0%	1.3%
Electrical Goods & Home Entertainment	0	0.0%	3.2%
Fashion & General Clothing	0	0.0%	3.7%
Florists & Garden	0	0.0%	1.1%
Footwear	0	0.0%	0.8%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	0	0.0%	4.0%
Gifts, China & Leather Goods	0	0.0%	4.0%
Jewellers, Clocks & Watches	0	0.0%	0.7%
Pet Shops & Pet Supplies	0	0.0%	0.9%
Sports, Toys, Cycle Shops & Hobbies	0	0.0%	1.5%

Representation Convenience

The level of convenience provision in the town centre is healthy and accounts for three units anchored by Spar, an independent butcher and a general stores/newsagents. In total, convenience representation accounts for 21.4% of all occupied units which is double the Powys average (10.2%).

A Londis store operates from within a garage on the A458 in close proximity to Bridge Street but is located outside the town centre boundary.

Table 94: Llanfair Caereinion breakdown of convenience units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Convenience	3	21.4%	10.2%
Bakers	0	0.0%	1.5%
Butchers & Fishmongers	1	7.1%	2.0%
Confectionery, Tobacco, Newsagents	1	7.1%	1.6%
Groceries, Supermarkets & Food Shops	1	7.1%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	0	0.0%	0.3%

Representation Leisure

There is a good level of representation from leisure uses in the town centre which account for 28.6% of occupied units (4 in total). This exceeds the Powys average (25.4%) and is focused on a mix of public houses, fish and chip takeaway, and accommodation hotel.

Table 95: Llanfair Caereinion breakdown of leisure units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Leisure	4	28.6%	25.4%
Accommodation	1	7.1%	3.1%
Bars, Pubs & Clubs	2	14.3%	6.5%
Cafes & Fast Food	1	7.1%	10.4%
Entertainment	0	0.0%	1.9%

Restaurants	0	0.0%	3.6%
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Representation Services

The services category accounts for a significant proportion of town centre units (42.9%) and consists of six units spread across a limited number of categories. The majority of the units occupied by services are categorised as hairdressing, health, and beauty. There is also a dental practice and a Post Office is located in the Spar.

Table 96: Llanfair Caereinion breakdown of service units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Service	6	42.9%	26.7%
Auto & Accessories	0	0.0%	0.3%
Auto Services	0	0.0%	0.4%
Banks, Financial Services & Building Societies	0	0.0%	3.2%
Employment & Post Offices	1	7.1%	1.6%
Estate Agents & Auctioneers	0	0.0%	4.1%
Hairdressing, Health & Beauty	4	28.6%	12.9%
Household & Home	0	0.0%	0.3%
Launderettes, Dry Cleaners & Other	0	0.0%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	0	0.0%	0.4%
Miscellaneous	1	7.1%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	0	0.0%	0.4%

Representation Largest All Categories & Independent/Multiple

The dominant business categories are focused on service and leisure uses, with hairdressing, health and beauty together with bars, pubs and clubs cumulatively accounting for over 42% of all occupied units in the town centre. There is also good representation from convenience categories given the small size of the town centre which reflect the top up nature of provision.

Table 97: Llanfair Caereinion top five categories (does not include vacant units)

Category of business	Number of business units	Proportion of town centre units
Hairdressing, Health & Beauty	4	28.6%
Bars, Pubs & Clubs	2	14.3%

Books, Arts & Crafts, Stationery, Printers	1	7.1%
Butchers & Fishmongers	1	7.1%
Confectionery, Tobacco, Newsagents	1	7.1%

A breakdown of independent and multiple businesses confirms the independent focus of local businesses (79% of all occupied businesses). This is broadly comparable to the Powys average. The level of multiple representation is focused on three businesses - Spar, Post Office and NFU Mutual offices - the latter a reflection of the agricultural hinterland.

Table 98: Llanfair Caereinion independent & multiple businesses (does not include vacant units)

	Number of businesses	Proportion of businesses	Powys average	Wales CLG Average
Independent	11	79%	80%	67%
Multiple	3	21%	20%	33%

Vacancy

One vacant unit was identified at the time of survey. This represents 6.7% of the identified units in the town centre.

Environmental Quality & Character

The town centre is designated a Conservation Area and represents a traditional and attractive built environment which is focused on Market Square and dominated by St Marys Church. The topography and setting of the town centre adjacent to the River Banwy further add to the character. Parking is available on street throughout the town centre with an area of off-street parking at Watergate Street. Traffic passes through the central area (via the B4385) which provides local access away from the main A458. Overall, the town centre has a generally good environmental quality with scope for improvements to some buildings.

Summary of Llanfair Caereinion Strengths and Weaknesses

Llanfair Caereinion is a small town centre which serves a large rural hinterland to the west of Welshpool. Located immediately off the A458, the town centre primarily serves a convenience, service and leisure role with a very limited comparison offer and is primarily concerned with providing for local top up needs and services.

- A small number of occupied units - 14 In total.

- Low level of vacancy - one vacant identified in the town centre.
- Above Powys average proportion of convenience units with three units including Spar, butchers and a general stores. There is also a Londis just outside the town centre.
- High level of service uses which significantly exceed the Powys average.
- Healthy level of leisure related uses which include two public houses and takeaway.
- Importance of independent businesses (79%) together with some multiple representation.
- Traditional attractive rural town centre with a qualitative heritage environment and good levels of on street parking.

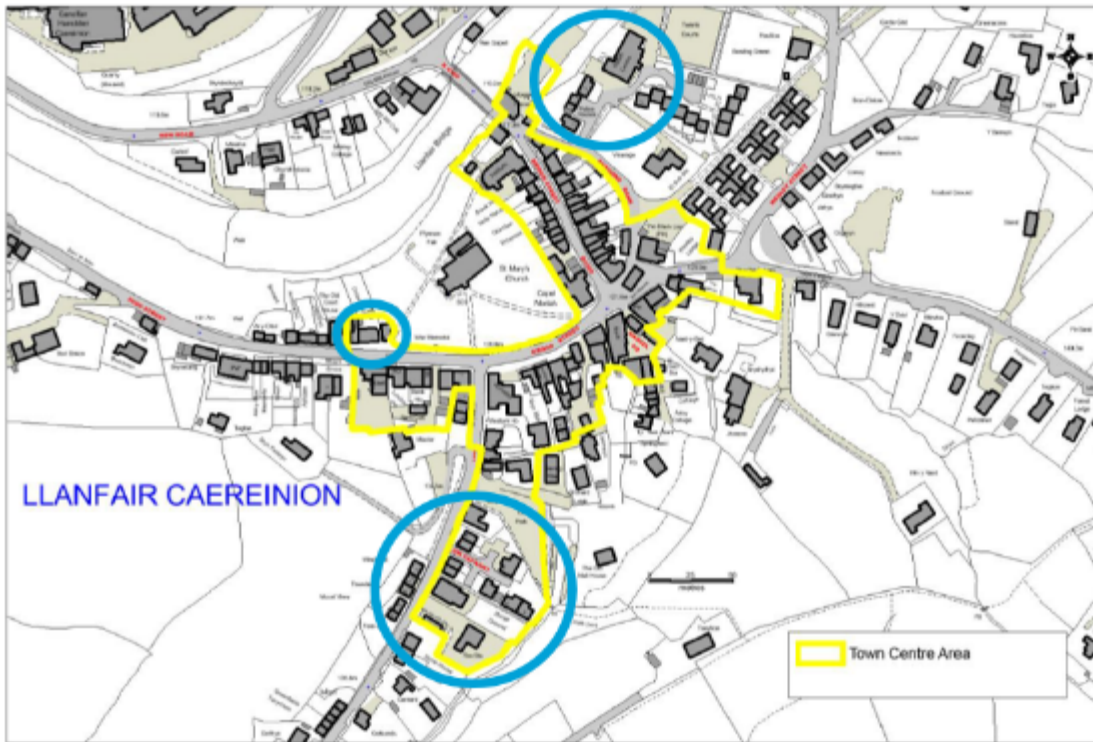
Llanfair Caereinion is identified as a 'Local Retail Centre' in the adopted LDP which is characterised by a limited range of services and facilities that provide for the most limited of day to day needs. The town centre continues to provide a localised role and is identified as one of the 'Local Towns' in the proposed retail hierarchy to reflect the local top up function.

Town Centre Boundary

The town centre boundary is tightly drawn around the main focus for commercial activity along Bridge Street, Market Square, Broad Street and High Street reflecting the dispersed location of the facilities through the town centre. In a number of areas there is scope to review the extent of the boundary to take account of the following options:

- The health centre at Hafan Deg off Bridge Street is at the fringe but outside the town centre boundary off Bridge Street which could be included in an extended boundary.
- Land at Watergate Street to the south of the off-street parking area is in residential use and could be removed from the town centre boundary.
- The same option exists for a number of residential units on the northern side of High Street adjacent to the west entrance to St Mary's Church.

Figure 16: Llanfair Caereinion potential amended town centre boundary



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Llanfyllin Health Check

Llanfyllin is classified as a 'Local Retail Centre' in the adopted LDP. It is located to the north west of Welshpool and serves a rural catchment in the north of the county. Welshpool is the nearest town centre together with Oswestry (Shropshire) to the north east. The linear town centre contains a range of local retail, services and community uses concentrated along the A490 which passes through the centre.

The key roles of Llanfyllin town centre include:

- Convenience shopping: the main convenience store is Spar, the largest unit located at the north of the town centre and sited alongside the main car park (shared with the doctors surgery). Local top up needs are also served by a butchers, mace convenience and a number of units offering vegan and ethical food products.
- Comparison shopping: a range of small independent retailers including women's fashion, gifts and crafts, specialist rural sports and a community charity shop.
- Services: a good range of services including a post office (located in the Spar), pharmacy, cafes, restaurant, takeaways, hairdressers and beauty salon, laundrette and professional financial services.
- Leisure: several pubs, Cain Valley Hotel and a community oriented café/hub.
- Community facilities: the town centre includes a doctors surgery, vets surgery and public institute/town hall.

A leisure sports centre, library, and community centre are located outside the town centre to the south.

Mix of Uses and Occupier Representation

The town centre was not assessed by the Local Data Company and is informed by a survey undertaken in January 2023. This identified Llanfyllin town centre a total of 28 retail and service units (excluding non-retail Class A uses).

The town centre has a significantly higher proportion of occupied convenience units (and to a lesser extent leisure) than the Powys and Welsh average although comparison and services uses are below the county and national average.

Table 99: Llanfyllin use by unit

Type of business	Number of business units	% of total business units
Comparison	7	25.0%
Convenience	5	17.9%
Leisure	8	28.6%
Miscellaneous	1	3.6%
Service	7	25.0%
Vacant	0	0.0%

Table 100: Llanfyllin by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales Average	CLG	Powys Average
Comparison	25.0%	29.3%		35.4%
Convenience	17.9%	4.3%		10.1%
Leisure	28.6%	25.6%		25.0%
Miscellaneous	3.6%	9.0%		2.5%
Service	25%	31.8%		27.0%

Representation Comparison

The comparison offer in Llanfyllin town centre confirms a below average (25%) representation when compared to the Powys average (35.2%). The overall level of representation is restricted to five categories with gifts, china and leather goods the dominant use (10.7% of the overall provision). The presence of a good quality women's clothing/fashion shop and specialist rural sports/clothing/equipment shop add to the comparison offer.

Table 101: Llanfyllin breakdown of comparison units

Category of business	Number of businesses	Proportion of town centre units	Powys average
Comparison	7	25.0%	35.2%
Books, Arts & Crafts, Stationery, Printers	0	0.0%	5.2%
Car & Motorbike Showrooms	0	0.0%	0.8%
Charity & Second-hand Shops	1	3.6%	4.4%
Chemists, Toiletries & Health	1	3.6%	2.9%
Department Stores & Mail Order	0	0.0%	0.3%
Discount & Surplus Stores	0	0.0%	0.5%

DIY, Hardware, Builder's Merchants & Household Goods	0	0.0%	1.3%
Electrical Goods & Home Entertainment	0	0.0%	3.2%
Fashion & General Clothing	1	3.6%	3.7%
Florists & Garden	0	0.0%	1.1%
Footwear	0	0.0%	0.8%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	0	0.0%	4.0%
Gifts, China & Leather Goods	3	10.7%	4.0%
Jewellers, Clocks & Watches	0	0.0%	0.7%
Pet Shops & Pet Supplies	0	0.0%	0.9%
Sports, Toys, Cycle Shops & Hobbies	1	3.6%	1.5%

Representation Convenience

The level of convenience provision (17.9%) is higher than the Powys average (10.2%) with a good level of representation of grocery, supermarket and food shops (14% of total occupied units). The largest facility, Spar, acts as the primary convenience store in the town centre and is complemented by a number of independent units (butchers and vegan/health foods). There are no bakers, newsagents, or off licence provision in the town centre.

Table 102: Llanfyllin breakdown of convenience units

Category of business	Number of businesses	Proportion of town centre units	Powys average
Convenience	5	17.9%	10.2%
Bakers	0	0.0%	1.5%
Butchers & Fishmongers	1	3.6%	2.0%
Confectionery, Tobacco, Newsagents	0	0.0%	1.6%
Groceries, Supermarkets & Food Shops	4	14.3%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	0	0.0%	0.3%

Representation Leisure

Llanfyllin town centre has a higher proportion of leisure units (28.6%) compared to the Powys average (25.4%). There is a good representation of the leisure categories (with the exception of entertainment) with above Powys average representation of bars and pubs (10.7% compared to 6.5%). The presence of a hotel in the town centre

and range and choice of cafés, fast food and restaurant provides a healthy level of leisure provision in the town centre.

Table 103: Llanfyllin breakdown of leisure units

Category of business	Number of businesses	Proportion of town centre units	Powys average
Leisure	8	28.6%	25.4%
Accommodation	1	3.6%	3.1%
Bars, Pubs & Clubs	3	10.7%	6.5%
Cafes & Fast Food	3	10.7%	10.4%
Entertainment	0	0.0%	1.9%
Restaurants	1	3.6%	3.6%

Representation Services

Compared to the Powys average, Llanfyllin has a marginally lower proportion of services (25%). Whilst the level of service categories represented in the town centre is relatively limited, the presence of a post office, laundrette, professional financial services and good provision of hair and beauty salons are broadly comparable, and in some cases higher than the Powys average.

Table 104: Llanfyllin breakdown of service units

Category of business	Number of businesses	Proportion of town centre units	Powys average
Service	7	25.0%	26.7%
Auto & Accessories	0	0.0%	0.3%
Auto Services	0	0.0%	0.4%
Banks, Financial Services & Building Societies	1	3.6%	3.2%
Employment & Post Offices	1	3.6%	1.6%
Estate Agents & Auctioneers	0	0.0%	4.1%
Hairdressing, Health & Beauty	3	10.7%	12.9%
Household & Home	0	0.0%	0.3%
Launderettes, Dry Cleaners & Other	1	3.6%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	0	0.0%	0.4%
Miscellaneous	1	3.6%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%

Travel Agents & Tour Operators	0	0.0%	0.4%
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Representation Largest All Categories & Independent/Multiple

There is no dominant category in representation terms with a balanced distribution of business categories although leisure (cafes and fast food; bars, pubs and clubs) account for over 21% of total units. The largest Individual category is groceries, supermarkets and food shops (14.3% of all units).

Table 105: Llanfyllin top five categories (does not include vacant units)

Category of business	Number of business units	Proportion of town centre units
Groceries, Supermarkets & Food Shops	4	14.3%
Gifts, China & Leather Goods	3	10.7%
Bars, Pubs & Clubs	3	10.7%
Cafes & Fast Food	3	10.7%
Hairdressing, Health & Beauty	3	10.7%

A breakdown of independent and multiple businesses confirms the dominant role of independent businesses (89%) which exceed both the Powys and Welsh average. By contrast, the presence of multiple stores is limited to 11% - well below the county and national average.

Table 106: Llanfyllin independent & multiple businesses (does not include vacant units)

	Number of businesses	Proportion of businesses	Powys average	Wales CLG Average
Independent	25	89%	80%	67%
Multiple	3	11%	20%	33%

Vacancy

No vacant units (actively marketed) were identified in Llanfyllin town centre at the time of survey.

Environmental Quality & Character

The majority of the linear town centre is a Conservation Area which contains a varied mix of heritage buildings and well-maintained frontages with residential properties interspersed with commercial uses. The A490 passes through the town centre which narrows to the northern part of the High Street. The overall public realm is considered of good quality with sensitive siting of street furniture whilst a good provision of on street parking exists together with wide pavement areas providing for outdoor seating, including a small outdoor area focused around the war memorial. The main area of off-street car parking is located at the northern fringe of the town centre.

Summary of Llanfyllin Strengths and Weaknesses

Llanfyllin town centre is compact and attractive, and serves a large rural hinterland in north Powys which is characterised by a good range and choice of convenience, comparison, leisure and service uses for its size. The town centre provides an important top up role with a good representation of convenience facilities which exceeds the Powys and Welsh average. There are also a number of specialist comparison uses, a healthy level of leisure (food and drink provision) and range of service uses. The attractive town centre also contains a number of community facilities which act as key attractors.

- No vacant units identified in the town centre.
- Llanfyllin town centre has a below Powys average proportion of comparison units overall but equally some specialist fashion, gifts and rural sports provision.
- Above county average proportion of convenience uses (17.9%) especially related to food stores, which includes a relatively modern Spar with a large car park.
- Above average provision of leisure units (28.6%) compared to the Powys average including higher proportion of bars, pubs and clubs. The town centre includes the Cain Valley Hotel.
- Restricted range of service uses but provision of a post office, laundrette and good representation of hair salons.
- Above average number of independent shop in comparison to the Powys and Welsh average.
- Good levels of on street and off-street parking.
- Attractive and well-maintained centre with a good environmental quality despite the A490 passing along the High Street.

Llanfyllin is identified as a 'Local Retail Centre' in the adopted LDP. The town centre serves a rural catchment area and provides a good range of services and facilities

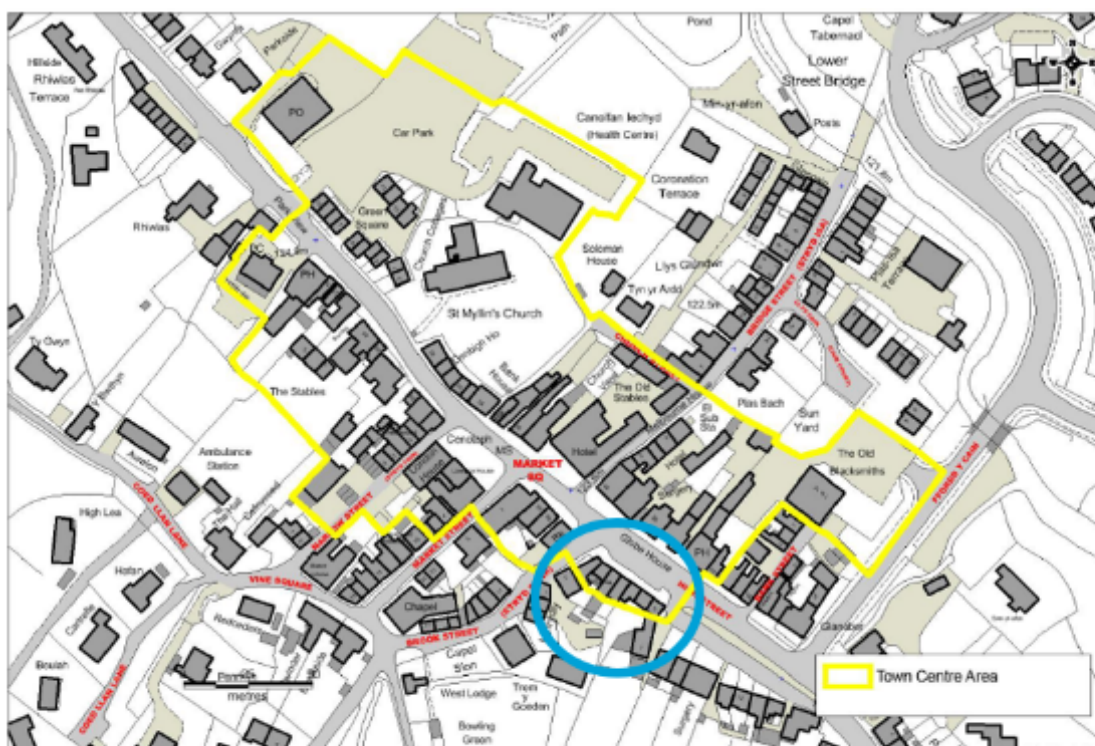
that provide for day to day needs and some specialist uses. The town centre is identified as one of the 'Local Towns' in the proposed retail hierarchy to reflect the role and function for local top up retail and services.

Town Centre Boundary

The town centre boundary is tightly drawn and incorporates the main areas of commercial activity along the linear A490 High Street. There are no concentrations of vacancy and whilst the library (including youth and community centre) and sports centre are located off High Street outside the town centre boundary to the south east, they are physically separated from the existing town centre by residential uses. An option exists to tighten the boundary at the following fringe area:

- The area of High Street to the south-east of Seeds restaurant is in residential use although the on street parking area should be retained in the town centre boundary.

Figure 17: Llanfyllin potential amended town centre boundary



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Llanwrtyd Wells Health Check

Llanwrtyd Wells is classified as an 'Local Retail Centre' in the adopted LDP. These have lesser catchment areas and are generally characterised by either a very compact retail area or a dispersal of several shops. Llanwrtyd Wells is located near to Builth Wells and helps serve the catchment of south Powys. The centre is also situated close to the town of Llandeilo (Carmarthenshire).

The key roles of Llanwrtyd Wells include:

- Convenience shopping: Premier convenience store and newsagent.
- Comparison shopping: there are no national comparison multiple retailers and a handful of independent retailers.
- Services, community and leisure provides a small range including cafes, and a number of pubs, restaurants and accommodation.

Mix of Uses and Occupier Representation

The centre has a total of 14 retail/service uses that includes a mix of occupied comparison, convenience service and leisure units. The proportion of leisure and convenience units is significantly higher compared with both the Wales and Powys averages.

Table 107: Llanwrtyd Wells use by unit

Type of business	Number of businesses	% of total business units
Comparison	3	21.4%
Convenience	2	14.3%
Leisure	6	42.9%
Miscellaneous	0	0.0%
Service	1	7.1%
Vacant	2	14.3%

Table 108: Llanwrtyd Wells by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales Average	CLG	Powys Average
Comparison	25.0%	29.3%		35.4%
Convenience	16.7%	4.3%		10.1%
Leisure	50.0%	25.6%		25.0%
Miscellaneous	0.0%	9.0%		2.5%
Service	8.3%	31.8%		27.0%

Representation Comparison

Compared to the Powys average, the centre has a much lower level of comparison shops (25%), with very limited range although still diverse centre with arts and crafts, clothing and furniture/textile category.

Table 109: Llanwrtyd Wells breakdown of comparison units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Comparison	3	25.0%	35.2%
Books, Arts & Crafts, Stationery, Printers	1	8.3%	5.2%
Car & Motorbike Showrooms	0	0.0%	0.8%
Charity & Second-hand Shops	0	0.0%	4.4%
Chemists, Toiletries & Health	0	0.0%	2.9%
Department Stores & Mail Order	0	0.0%	0.3%
Discount & Surplus Stores	0	0.0%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	0	0.0%	1.3%
Electrical Goods & Home Entertainment	0	0.0%	3.2%
Fashion & General Clothing	1	8.3%	3.7%
Florists & Garden	0	0.0%	1.1%
Footwear	0	0.0%	0.8%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	1	8.3%	4.0%
Gifts, China & Leather Goods	0	0.0%	4.0%
Jewellers, Clocks & Watches	0	0.0%	0.7%
Pet Shops & Pet Supplies	0	0.0%	0.9%
Sports, Toys, Cycle Shops & Hobbies	0	0.0%	1.5%

Representation Convenience

Compared to the Powys average, the centre has a higher proportion of convenience shops (17%) although just two units served by a general store and newsagent.

Table 110: Llanwrtyd Wells breakdown of convenience units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Convenience	2	16.7%	10.2%
Bakers	0	0.0%	1.5%
Butchers & Fishmongers	0	0.0%	2.0%
Confectionery, Tobacco, Newsagents	1	8.3%	1.6%
Groceries, Supermarkets & Food Shops	1	8.3%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	0	0.0%	0.3%

Representation Leisure

Compared to the Powys average, the centre has a significantly higher proportion of leisure units (50%) with notable strengths in accommodation, café and restaurants.

Table 111: Llanwrtyd Wells breakdown of leisure units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Leisure	6	50.0%	25.4%
Accommodation	2	16.6%	3.1%
Bars, Pubs & Clubs	1	8.3%	6.5%
Cafes & Fast Food	2	16.6%	10.4%
Entertainment	0	0.0%	1.9%
Restaurants	1	8.3%	3.6%
Miscellaneous	0	0.0%	2.5%
Medical	0	0.0%	0.3%
Transport	0	0.0%	2.3%

Representation Services

Compared to the Powys average, the centre has a significantly lower proportion of services (8%).

Table 112: Llanwrtyd Wells breakdown of service units

Category of business (organised by type – in bold)	Number of business units	Proportion of town centre units	Powys average
Service	1	8.3%	26.7%
Auto & Accessories	0	0.0%	0.3%
Auto Services	0	0.0%	0.4%
Banks, Financial Services & Building Societies	0	0.0%	3.2%
Employment & Post Offices	0	0.0%	1.6%
Estate Agents & Auctioneers	0	0.0%	4.1%
Hairdressing, Health & Beauty	0	0.0%	12.9%
Household & Home	0	0.0%	0.3%
Launderettes, Dry Cleaners & Other	0	0.0%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	1	8.3%	0.4%
Miscellaneous	0	0.0%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	0	0.0%	0.4%

Representation Largest All Categories & Independent/Multiple

Across all categories, the largest number of business units are in the leisure category.

Table 113: Llanwrtyd Wells top five categories (does not include vacant units)

Category of business	Number of business units	Proportion of town centre units
Accommodation	4	33.3%
Cafes & Fast Food	2	16.7%
Books, Arts & Crafts, Stationery, Printers	1	8.3%
Fashion & General Clothing	1	8.3%
Furniture, Carpets, Textiles, Bathrooms & Kitchens	1	8.3%

A breakdown on independent and multiple businesses shows the centre is wholly independent.

Table 114: Llanwrtyd Wells independent & multiple business units

	Number of businesses	Proportion of businesses	Powys average	Wales CLG Average
Independent	12	100%	80%	67%
Multiple	0	0%	20%	33%

Vacancy

There were two vacant retail units within town centre at the time of the survey resulting in a vacancy rate above the Powys average and comparable with the Welsh average.

Table 115: Llanwrtyd Wells vacancy

Type of unit	Number of business units	% of business units	Wales CLG Average	Powys average
Occupied	12	86%	84%	88%
Vacant	2	14%	16%	12%
Total	14			

Environmental Quality & Character

Llanwrtyd Wells is one of the smallest towns in Britain and this is reflected in the character of its centre which is very compact, supporting only a small number of shops and services. The centre is historically attractive and charming with numerous substantial Victorian buildings originally developed as hotels, guests houses and shops.

The commercial area is spread along the A483 with the striking Neuadd Arm Hotel enclosing the heart of the centre where Dolecoed Road and Irfon Terrace meet, and businesses are clustered around the junction and open area. Despite the openness and wider pavements, the quality of the town centre environment is diminished by the dominance of moving traffic along the busy A483.

Summary of Llanwrtyd Wells' Strengths and Weaknesses Strengths

Despite the limited range of facilities and services, the centre provides the basics including a convenience store and the essentials that provide a focal point its local community. Adjacent to the centre there's a filling station/garage, pharmacy and Post Office (located within the garage) adding to the overall vibrancy.

There are a small number of specialist independent shops providing interesting and attractive experiences including a women's clothing shop, fabrics/haberdashery, general/hardware store, arts and crafts.

There has been a long-term decline of the centre with the loss of businesses converted to residential and at the present time there are a small number of vacant premises that do not appear to be actively marketed for reoccupation.

- A limited range of shops and services which serve the day to day needs of local residents.
- Food and grocery provision suitable for top up food shopping.
- The centre has a limited provision of car parking for shoppers.
- A historic centre with a good quality streetscape and environment.
- Strong leisure offer with food, drink and accommodation representing half of all businesses.

Llanwrtyd Wells is identified as a 'Local Retail Centre' in the adopted LDP which is characterised by a limited range of services and facilities that provide for the most limited of day to day needs. The town centre continues to provide a localised role and is identified as one of the 'Local Towns' in the proposed retail hierarchy to reflect the local top up function.

Town Centre Boundary

The town centre boundary is tightly drawn with scope to widen to include adjacent services and attractions that add to the multifunctional nature of the centre. Options include:

- Beulah Road including the Heritage Centre, Garage with Post Office, Pharmacy and accommodation.

Dolecoed Road beyond the existing boundary is primarily residential in nature and the Stonecroft Inn and fire station probably too detached from the centre to recommend including within the defined area.

Figure 18: Llanwrtyd Wells potential amended town centre boundary



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Montgomery Health Check

Montgomery is designated a 'Local Retail Centre' in the adopted LDP and is located between the two largest retail centres of Newtown and Welshpool. The small historic town centre provides a limited range of retail and service uses with the heritage attraction of Montgomery Castle a key attractor. The key roles of Montgomery town centre include:

- Convenience shopping: limited local convenience offer provided by Spar;
- Comparison shopping: a small number of specialist independent retailers including DIY and hardware, furniture and home interior, books and gifts;
- Services: a very limited range of services but includes a post office (within a café) and garage;
- Leisure: provision orientated towards tourism and hospitality uses including cafés, restaurant, pubs, museum and a number of accommodation options;
- Community facilities: limited to the town hall (which supports a weekly indoor market). The medical practice is located outside the town centre to the south.

Mix of Uses and Occupier Representation

The town centre was not assessed by the Local Data Company and is informed by a survey undertaken in January 2023 which identified a total of 18 retail and service units in Montgomery town centre (excluding non-retail Class A uses).

Leisure uses dominate occupied units in the town centre and account for 50% of all units. This is a significantly high proportion when compared to the Powys and Welsh average (25%). By contrast, the traditional convenience and comparison role is less established and lower than the county average, especially for convenience uses. The proximity of Montgomery to the higher order town centres of Newtown and Welshpool provide local destinations for main convenience and comparison needs.

Table 116: Montgomery use by unit

Type of business	Number of businesses	% of total business units
Comparison	5	27.8%
Convenience	1	5.6%
Leisure	9	50.0%
Miscellaneous	0	0.0%
Service	3	16.7%
Vacant	0	0.0%

Table 117: Montgomery by occupied unit (excluding vacancy)

Type of business	% of occupied business units	Wales Average	CLG	Powys Average
Comparison	27.8%	29.3%		35.4%
Convenience	5.6%	4.3%		10.1%
Leisure	50.0%	25.6%		25.0%
Miscellaneous	0.0%	9.0%		2.5%
Service	16.7%	31.8%		27.0%

Representation Comparison

The comparison offer in Montgomery town centre confirms a below average (27.8%) representation when compared to the Powys average (35.2%). The overall level of representation is spread across five categories, a number of which are relatively specialist in nature that include florists; gifts, china and leather goods; books, arts and crafts; DIY and hardware, and furniture and home interiors. The nature of a high quality, distinctive comparison provision in the town centre reflects the visitor and tourism role of Montgomery.

Table 118: Montgomery breakdown of comparison units

Category of business	Number of business units	Proportion of town centre units	Powys average
Comparison	5	27.8%	35.2%
Books, Arts & Crafts, Stationery, Printers	1	5.6%	5.2%
Car & Motorbike Showrooms	0	0.0%	0.8%
Charity & Second-hand Shops	0	0.0%	4.4%
Chemists, Toiletries & Health	0	0.0%	2.9%
Department Stores & Mail Order	0	0.0%	0.3%
Discount & Surplus Stores	0	0.0%	0.5%
DIY, Hardware, Builder's Merchants & Household Goods	1	5.6%	1.3%
Electrical Goods & Home Entertainment	0	0.0%	3.2%
Fashion & General Clothing	0	0.0%	3.7%
Florists & Garden	1	5.6%	1.1%
Footwear	0	0.0%	0.8%

Furniture, Carpets, Textiles, Bathrooms & Kitchens	1	5.6%	4.0%
Gifts, China & Leather Goods	1	5.6%	4.0%
Jewellers, Clocks & Watches	0	0.0%	0.7%
Pet Shops & Pet Supplies	0	0.0%	0.9%
Sports, Toys, Cycle Shops & Hobbies	0	0.0%	1.5%

Representation Convenience

The level of convenience provision is limited to one unit (5.6%) occupied by the Spar which provides for local top up needs. The level of convenience provision is near half the Powys average (10.2%).

Table 119: Montgomery breakdown of convenience units

Category of business	Number of business units	Proportion of town centre units	Powys average
Convenience	1	5.6%	10.2%
Bakers	0	0.0%	1.5%
Butchers & Fishmongers	0	0.0%	2.0%
Confectionery, Tobacco, Newsagents	0	0.0%	1.6%
Groceries, Supermarkets & Food Shops	1	5.6%	4.9%
Off Licenses	0	0.0%	0.0%
Petrol Filling Stations	0	0.0%	0.3%

Representation Leisure

The level of representation from leisure uses is significant with 50% of units (nine in total) supporting all the leisure categories. This is double the Powys average (25.4%). The tourism role of Montgomery town centre is reflected in the diversity of leisure uses with above average representation in accommodation; cafés; entertainment (the Old Bell museum) and restaurants.

Table 120: Montgomery breakdown of leisure units

Category of business	Number of business units	Proportion of town centre units	Powys average
Leisure	9	50.0%	25.4%
Accommodation	3	16.7%	3.1%

Bars, Pubs & Clubs	1	5.6%	6.5%
Cafes & Fast Food	3	16.7%	10.4%
Entertainment	1	5.6%	1.9%
Restaurants	1	5.6%	3.6%

Representation Services

Compared to the Powys average, Montgomery town centre has a lower proportion of services (16.7%). The level of service categories represented in the town centre is limited to auto services (garage), post office (within Ivy House café) and a hair salon.

Table 121: Montgomery breakdown of service units

Category of business	Number of business units	Proportion of town centre units	Powys average
Service	3	16.7%	26.7%
Auto & Accessories	0	0.0%	0.3%
Auto Services	1	5.6%	0.4%
Banks, Financial Services & Building Societies	0	0.0%	3.2%
Employment & Post Offices	1	5.6%	1.6%
Estate Agents & Auctioneers	0	0.0%	4.1%
Hairdressing, Health & Beauty	1	5.6%	12.9%
Household & Home	0	0.0%	0.3%
Launderettes, Dry Cleaners & Other	0	0.0%	0.8%
Locksmiths, Clothing Alterations & Shoe Repairs	0	0.0%	0.3%
Miscellaneous	0	0.0%	2.8%
Pawnbroking & Cheque Cashing	0	0.0%	0.0%
Travel Agents & Tour Operators	0	0.0%	0.4%

Representation Largest All Categories & Independent/Multiple

The dominant business categories are focused on leisure uses, with two categories (accommodation, cafés and fast food) accounting for a third of all occupied units. This confirms the importance of the hospitality and visitor economy to the town centre.

Table 122: Montgomery top five categories (does not include vacant units)

Category of business	Number of businesses	Proportion of town centre units
Accommodation	3	16.7%
Cafes & Fast Food	3	16.7%
Books, Arts & Crafts, Stationery, Printers	1	5.6%
DIY, Hardware, Builder's Merchants & Household Goods	1	5.6%
Florists & Garden	1	5.6%

A breakdown of independent and multiple businesses confirms the dominance of independent businesses which account for 94% of all occupied businesses. This is significantly higher than the Powys and Welsh average. The level of multiple representation is limited to one unit - occupied by Spar.

Table 123: Montgomery independent & multiple businesses not include vacant units)

	Number of businesses	Proportion of businesses	Powys average	Wales CLG Average
Independent	17	94%	80%	67%
Multiple	1	6%	20%	33%

Vacancy

No vacant units (actively marketed) were identified in Montgomery town centre at the time of survey.

Environmental Quality & Character

The town centre forms part of an extensive Conservation Area and is characterised by a distinctive and attractive heritage environment. There are a large number of listed buildings (typically grade II) concentrated at Broad Street and Arthur Street alongside the Grade II* Montgomery town hall, an iconic Georgian building which dominates the centre. The high quality and character of the built environment is enhanced by well-maintained buildings and a sensitive public realm with on-street parking to the front of properties along Broad Street and Arthur Street. The town centre is directly accessible off the B4385 which is aligned to the east of Broad Street which directs passing traffic away from the central area.

Summary of Montgomery Strengths and Weaknesses

Montgomery is a small and attractive heritage town centre which is located between the main town centres of Newtown and Welshpool. The town centre offer is concentrated on tourist related uses associated with leisure and specialist comparison together with limited convenience and service provision to meet the most immediate local needs. The town centre acts as a unique visitor destination set within a qualitative built environment.

- A small number of occupied units with limited range and choice.
- Below Powys average proportion of convenience units which is limited to one unit (Spar).
- Representation from a number of specialist comparison categories aligned to the tourist and day visitor.
- Significant over representation from leisure related uses which account for 50% of all occupied units; this is double the Powys average with accommodation and cafés dominating the nature of leisure uses.
- Very restricted range of service uses reflecting the small size of the town centre although includes a post office, garage and hair salon.
- Dominance of independent businesses (94%) with one national multiple (Spar).
- No vacant units identified in the town centre.
- Attractive qualitative heritage environment with high quality public realm and good levels of on street parking.

Montgomery is identified as a 'Local Retail Centre' in the adopted LDP. The town centre is small, compact and provides a very limited range of services and facilities that are orientated towards tourism and hospitality together with limited day to day needs. The town centre is identified as one of the 'Local Towns' in the proposed retail hierarchy to reflect the localised and limited top up role and function.

Town Centre Boundary

The town centre boundary is tightly drawn reflecting the small and compact nature of commercial activity concentrated at Broad Street, Market Square and Arthur Street (part). No change to the town centre boundary is recommended.

Figure 19: Montgomery potential amended town centre boundary



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