An Inquiry Report of the:

Economy & Culture Scrutiny Committee

SHAPING CARDIFF'S POST-PANDEMIC ECONOMIC RECOVERY

January 2023

CARDIFF
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Cardiff Council

CONTENTS

FOREWORD

Post pandemic, our economy is refocusing, with changing work and retail patterns. At the same time, it is becoming increasingly evident that we need to ensure our economy supports efforts to respond to the climate and nature emergencies. There is a role for the Council here, to provide leadership and vision, to ensure the replacement Local Development Plan sets an appropriate placemaking and place management strategy, to engage with stakeholders to understand their needs, and to facilitate and convene conversations to address challenges.

In the first Inquiry report from our new committee, formed following the local elections in 2022, Members therefore decided to focus on the role the Council could play in shaping our economy post pandemic. We focused on areas already highlighted by the Council as areas in which it wished to assist, and we sought stakeholders' views on how they wished the Council to help. We considered evidence on what has worked elsewhere and sought practical examples of actions the Council could take. Throughout all our work, we bore in mind that the Council faces huge financial pressures and therefore has limited funding to bring to bear.

I am grateful to all those who met with us, to share their thoughts, ideas and experiences of living and working in Cardiff and elsewhere. I am particularly grateful to FSB Cymru for undertaking a survey of Cardiff small businesses to inform this Inquiry, to Cardiff Research Centre for their work on the Ask Cardiff 2022 survey that included questions for this Inquiry, and to Scrutiny Researcher Gladys Hingco for her bespoke survey of remote worker, co-workers, traders and small businesses.

Half of our recommendations focus on how the Council can best implement its stated aim of Cardiff becoming a 15-minute city including, critically, the need to engage in dialogue with residents, communities and stakeholders. Our remaining recommendations focus on specific actions arising from the evidence we received; these include actions to help the city centre, local and district centres, small businesses, entrepreneurs and start-ups.

This Inquiry has been far-ranging and, as such, it has inevitably been high level in places. There are areas that warrant more detailed investigation, and I am sure that this committee will want to explore these at a later date. I would like to thank my fellow task group Members – Councillors Berman, Henshaw, Jenkins, Lloyd Jones and Robinson – for completing this Inquiry in record time, and Angela Holt, scrutiny officer, for her support.

Councillor Peter Wong
Chair, Economy & Culture Scrutiny Committee
January 2023

TERMS OF REFERENCE

- To explore with key stakeholders what the Council's role should be in assisting Cardiff's economy to recover post-pandemic, in the context of limited funding, looking in particular at:
    - Remote and co-working needs & requirements
    - Support for small businesses and independent artists
    - Role of Local and District Centres
    - Role of City Centre
    - 15-minute city model
    - Broadband provision.

- To reference good practice from other cities that have adopted the 15-minute city model, identifying key lessons that are applicable to Cardiff.

- To utilise the findings from the above to make informed recommendations to all relevant parties on the most appropriate approaches to take in Cardiff.

KEY FINDINGS

In line with this Inquiry's terms of reference, the key findings focus on the role of the Council in shaping Cardiff's economy post-pandemic, in a time of limited funding, including how best to implement a 15-minute city, which is a key commitment of the current Administration.

Leadership

KF1. Politicians and senior officers need to provide leadership and ensure a vision for Cardiff's economy, post pandemic; these are contained in the Corporate Plan, Recovery and Renewal Plan and City Centre Recovery Action Plan. There is now a need to build on these by articulating the vision for Cardiff being a 15-minute city, clarifying for residents, businesses, and investors what Cardiff wishes to achieve by being a 15-minute city and how it intends to realise this.

KF2. Clarity of purpose and leadership will help to ensure work is implemented to align resources, enabling behaviour changes in line with 15-minute city.

Strategy and Policy

KF3. It is important to recognise the economic role Cardiff plays as a capital city and regional centre and ensure that the 15-minute city model for Cardiff recognises this and enables Cardiff to continue with this role, whilst balancing this with the need to ensure access to local services.

KF4. Different areas of Cardiff will require different approaches to being a 15-minute city – it is not a 'on size fits all' approach.

KF5. The Council should review the Corporate Plan, Recovery and Renewal Plan and City Centre Recovery Action Plan annually and enable actions to be altered as required, given the fast-changing economic landscape.

KF6. It is essential the Council demonstrates that it is pro-small business, for example the strategic commitment to ensure its procurement process is small business-friendly.

KF7. It is critical that the 15-minute model for Cardiff is enshrined in the Local Development Plan policies, as this sets the approach for placemaking and place management, providing the framework for planning decisions.

KF8. Supplementary Planning Guidance is also important to expand on how the Council favours developments that meet the 15-minute model for Cardiff.

Regional Working

KF9. Several witnesses highlighted the need for the Council to work with the Cardiff Capital Region City Deal to optimise opportunities for Cardiff's economy, including ensuring skills training and support addresses the recruitment issues facing Cardiff, marketing, tourism, and economic development overall.

KF10. The Inquiry heard that it will not be possible for Cardiff to deliver a 15-minute model without discussion with neighbouring local authorities, due to transport interconnectedness and provision of regional services in Cardiff e.g., health services. The yet-to-be-developed Strategic Development Plan should help with these discussions, providing a regional approach to planning.

Engagement

KF11. This Inquiry heard from several witnesses that it is important the Council communicates and engages with them to enable the Council to be aware of the needs and demands in various sectors. This included:

a. District and Local Centre Traders requesting that the Council establish Traders Forums, to share information, address issues, and work constructively to promote centres
b. Creative Cardiff/ Creative Economy Unit highlighting the need for specific, active consultation with the creative community at an earlier stage in respect of development sites, to help understand needs and opportunities and so inform the planning process
c. RTPI Cymru highlighting that community engagement is key to successfully implementing the 15-minute city model.

KF12. Several areas in the UK are either consulting or have consulted with their communities regarding 15-minute cities; this report includes details of work in Scotland, including Edinburgh, and Ipswich.

KF13. When developing the 15-minute city model for Cardiff, it is important to try new ways of engaging and consulting, to build trust to ensure all voices are heard as opposed to dominant voices; this requires reaching out in different ways to connect with different audiences in different parts of the city. Whilst this takes time and is resource intensive, it means that plans are truly reflective of communities and more likely to be successful.

KF14. There are several participatory planning mechanisms that would assist the Council to engage effectively when implementing a 15-minute city, including place plans and work via Planning Aid Wales.

Financial Support

KF15. Several witnesses to the Inquiry highlighted the need for the extension of business rate relief programmes to support specific sectors of Cardiff's economy. During the Inquiry, the Welsh Government announced it is extending business rate relief to eligible businesses in the retail, leisure and hospitality sectors. Members heard that the following would also be helpful:

a. Extension of discretionary Business Rate Relief programmes for creative sector business providing social or community value, with a sliding scale to support sustainability
b. Extension of discretionary Business Rate Relief programme to Corp B companies, which have positive socio-economic and environmental impacts, which utilise empty units above retail, which encourages footfall.

KF16. Several witnesses to the Inquiry wondered whether there was scope to use some of the Shared Prosperity Funding awarded to the Council to:

a. Have a lower-level enterprise fund for small businesses
b. Support the reimagination of the city centre.

KF17. Other witnesses to the Inquiry highlighted that relatively small sums of monies (£2,000) make all the difference to start-ups that are seeking to grow and wondered whether the Council could:

a. Set up a scheme with selected private sector lenders to underwrite small loans (£2,000) for start-ups, enabling lenders to offer more affordable rates
b. Set up an endowment scheme for entrepreneurs.

KF18. The Inquiry also heard there may be scope for district centres to establish Business Improvement Districts (BIDs) that would raise monies to go towards community events and other activities deemed priorities by the local traders.

Understanding Needs and Demands

KF19. With changing patterns in work locations and retail, this Inquiry heard it was important the Council uses data to understand these changes and target actions accordingly:

a. Use mobile phone usage data to understand behaviour patterns in the city centre, enabling businesses, event management and marketing to be more effectively targeted
b. Undertake research to clarify changing habits of residents re use of city centre and use of local and district centres
c. Map 15-minute walk/cycle areas and overlay with remote working and coworking provision to identify gaps
d. Use available Council databases to ask about remote and coworking needs to help clarify demand.

KF20. The successful implementation of 15-minute city principles is underpinned by a thorough understanding of usage patterns and residents' needs. This requires comprehensive gathering of data to understand usage patterns, spatial analysis, and qualitative research to understand residents' needs.

Public Transport

KF21. Both FOR Cardiff and Creative Cardiff/ Creative Economy Unit highlighted the need for a strong public transport network later into the night, to help Cardiff's economy longer-term. This would enable visitors and employees to get home safely. They highlighted this would help employers who are struggling to attract staff to work late, for example in the hospitality and leisure sectors, as well as those already working late, including creatives.

KF22. FOR Cardiff highlighted that it was important to plan any extension carefully, to ensure any extension operated for a sufficient time to influence behaviour change and create the footfall required to meet the costs of late-night public transport. They added that now might not be the right time to trial an extension, given the economic pressures facing consumers, but that this is definitely something that needs addressing in Cardiff longer-term.

Active Travel

KF23. The provision of active travel routes is central to a 15-minute city. Responses to the Ask Cardiff survey indicate that only 26% of respondents felt there were safe cycling lanes and/ or routes to enable access to their local neighbourhood services and amenities, and only 48% of respondents felt there were safe walking routes.

KF24. The RTPI Cymru highlighted that the Welsh Government 21st Century Schools guidance does not cover active travel and it is therefore incumbent on the Council to ensure there are active travel routes that enable pupils, teachers and staff to access schools safely.

KF25. This Inquiry heard that businesses require advice and support to show them how some of them could utilise active travel and to share good practice amongst businesses on how best to reconfigure workspaces to provide active travel facilities.

KF26. FSB Cymru highlighted that some businesses require a vehicle to carry their tools/ equipment. They called on the Council to work with UK and Welsh Government to ensure those businesses that do require a vehicle are supported to use an electric vehicle by installing infrastructure and providing advice and guidance and lobbying for incentives for electric vehicles for businesses.

Congestion Charge

KF27. Both FOR Cardiff and the FSB Cymru highlighted the need to clarify whether or not there is going to be a congestion charge and how this would work.

Responding to Changing Work Patterns

KF28. Whilst Cardiff has provision of many types of workspace, this Inquiry heard that:

a. Cardiff does not have the same level of coworking provision as other cities such as Amsterdam and London
b. there is a shortage of affordable follow-on space with the right support networks to enable start-ups to grow
c. there is a lack of suitable small industrial units in good locations, with low insurance premiums.

KF29. The Council has an important role to play in facilitating and convening conversations around the needs arising from changing work patterns. Equally, it has an important role to play in enabling the provision of appropriate workspaces.

KF30. This Inquiry heard that, through its planning role, the Council could assist workspace provision by:

a. Including the need for coworking provision in new developments
b. Supporting the integration of cultural and creative use buildings in long-term development plans
c. Adopting an Affordable Workspace Policy
d. Having more dynamic and imaginative use of Section 106.

KF31. This Inquiry heard the Council could also assist workspace provision by:

a. Unlocking assets – its own and those of public sector partners
b. Developing a space register
c. Developing a risk register
d. Utilising incentives/ disincentives to encourage landlords to bring vacant high street units back into use
e. Buying empty warehouses across Cardiff and turning them into smaller units.

Responding to Changing Retail Patterns

KF32. Several witnesses raised the need to improve the experience of those using the city centre and local and district centres, as follows:

a. Improve the street scene

i. Enable more benches, tables and chairs on pavements, to provide space for socialising and create a community feel
ii. Brighten up streets by providing planters, rubbish bins and lamp post banners
iii. Introduce a busking strategy and byelaws to promote good busking that adds to the ambience and tackle poor busking that is detrimental to nearby businesses.

b. Have visitor attractions/ events
   i. Introduce a city centre visitor attraction
   ii. Support local and district centres with community events
c. Address begging and shoplifting
   i. Liaise with Police regarding PCSO patrols and Radio-Net
   ii. Appraise the use of Public Space Protection Orders in Newport and whether these would work in Cardiff
d. Tackle homelessness
   i. Assist FOR Cardiff to market and promote their '*Give DIFFerently'* homelessness project

KF33. For local and district centres, parking was also identified as an area the Council could assist in, by identifying suitable areas to provide additional spaces. This ties into the responses received to the Ask Cardiff survey, where poor parking facilities were the highest rated barrier, at 24%, to accessing local neighbourhood services.

Improving Interface with the Council

KF34. FSB Cymru highlighted that there are many aspects of the Council that interface with small businesses including planning and licensing. They highlighted their members' view that planning and licensing processes need to be reviewed to simplify and speed-up processes, particularly at the moment when costs are increasing rapidly, and projects may become unaffordable if it takes too long to get relevant permissions.

Business Support

KF35. FSB Cymru highlighted their members view that there is a need to provide advice and guidance to small businesses. They stressed that this did not mean that the Council needed to provide the business support but be able to signpost to organisations that can provide support to business, particularly about how small businesses can become more sustainable.

Marketing/ Publicity

KF36. Several witnesses to the Inquiry highlighted the Council could use its marketing and social media channels to assist post-pandemic economic recovery:

a. Use Council social media to promote local and district centres and promote 'shop local'
b. Use Council social media to generate ideas and interest in local communities to support local and district centres
c. The Council to be involved in a publicity campaign to raise awareness of different workspaces and their benefits.

KF37. FOR Cardiff informed the Inquiry that they could take on the Destination Marketing role for Cardiff, as happens elsewhere, and that this could produce savings for the Council.

Role of Planning in implementing 15-minute city model

KF38. The Council's planning function is key to successfully developing and implementing a 15-minute model for Cardiff. RTPI Cymru stressed it is therefore important to ensure there are sufficient resources in planning, to deal with the required detailed mapping, planning and community engagement.

KF39. At a strategic level, the Local Development Plan and associated Supplementary Planning Guidance need to articulate the Council's vision, objectives and requirements regarding Cardiff being a 15-minute city, thus setting the framework for planning decisions.

KF40. Planning can assist in making Cardiff a 15-minute city, via urban retrofitting and in new developments, by undertaking spatial analysis, modelling potential interventions to restore/ ensure connectivity, pursuing facilities that benefit existing and new communities, and avoiding car dependent developments.

KF41. This Inquiry heard that, for new developments, it is important the Council negotiates key infrastructure provision – such as public transport and roads – is provided up-front and before residents move in, so that residents' habits are shaped from first occupation.

KF42. This Inquiry heard that, with regard to density and viability, the Council needs to ensure developers are given clear upfront guidance on the expectations for developments, so these are planned in from the start. Usually, more dense developments are able to meet 15-minute city principles, as population densities will support local commercial facilities and, for new developments, raise more monies for negotiation for community facility provision. However, this does not need to be high-rise development, low-rise density can be sufficient.

KF43. At a specific level, this Inquiry heard that it is important the Council consider the provision of childcare when planning Cardiff being a 15-minute city, so that working parents are supported, particularly entrepreneurs.

KF44. RTPI Cymru suggested Cardiff Council consider signing up to the Placemaking Wales Charter, which can assist in bringing together all the elements required to ensure sustainable communities.

KF45. RTPI Cymru highlighted their outcome focused toolkit, RTPI | Measuring What Matters: Planning Outcomes Toolkit, would be a useful tool to monitor successes in new provision, and whether Cardiff Council is building better places.

Broadband

KF46. The majority of Cardiff has access to broadband and the recent Ask Cardiff survey found 80% respondents are fairly or very satisfied with their level of connectivity.

KF47. Welsh Government has identified 20,000 properties in Cardiff that are not included in commercial plans for Full Fibre to the Premises Gigabit roll-out. Cardiff Council has been successful in a £7.7m Local Broadband bid for funding to help address this.

KF48. The Local Broadband project runs till 2025 and should go a long way to tackling poorly served premises in Cardiff.

RECOMMENDATIONS

Having considered the evidence presented to this Inquiry, the Economy & Culture Scrutiny Committee makes the following recommendations.

R1. Within 6 months, the Cabinet articulates its vision for Cardiff as a 15-minute city, explaining how this will take into account the economic role Cardiff plays as a capital city and regional centre and that different areas of Cardiff require different approaches to being a 15-minute city.

R2. Within 9 months, the Cabinet shares their vision for Cardiff as a 15-minute city with residents, communities and stakeholders by:

a. tasking officers to use the evidence gathered by this Inquiry regarding participatory planning mechanisms to develop an approach to engage residents, communities and stakeholders, which ensures all voices are able to be heard

b. engaging in dialogue with residents, communities and stakeholders to help develop and refine local implementation plans.

R3. Within 6 months, the Cabinet sets out how its vision for Cardiff as a 15-minute city will be embedded in Council strategies and policies.

R4. Within 12 months, the Cabinet ensures the 15-minute city for Cardiff is enshrined in the Local Development Plan and future Supplementary Planning Guidance, utilising the recommendations of the Environmental Scrutiny Committee's Supplementary Planning Guidance Inquiry (October 2022).

R5. Within 12 months, the Cabinet tasks officers to ensure that future masterplans and planning policies clearly articulate the expectation for developments to support Cardiff being a 15-minute city, in terms of infrastructure and community provision, to enable developers to bear these in mind as part of their viability calculations.

R6. Within 12 months, the Cabinet tasks officers to work with stakeholders to address the public transport needs of a 15-minute city, including consideration of the need for late-night public transport provision.

R7. Within 12 months, the Cabinet tasks officers to ensure that, where sustainable transport infrastructure is negotiated to support Cardiff being a 15-minute city - including active *travel and public transport - this is provided upfront and prior to residents moving in, so that residents' habits are shaped from first occupation.*

R8. Within 12 months, the Cabinet signs up to the Placemaking Wales Charter, which supports 15-minute city neighbourhoods.

R9. Within 12 months, the Cabinet considers whether an outcome-focused planning approach would assist Cardiff in its journey to be a 15-minute city.

R10. Within 6 months, the Cabinet commences an annual review of the Recovery and Renewal Plan and City Centre Recovery Action Plan, to ensure actions are altered as required to respond to the fast-changing economic landscape.

R11. Within 12 months, the Cabinet tasks officers to work with local and district centre traders to find ways to establish trader forums, including investigating the feasibility of establishing Business Improvement Districts in some District Centres.

R12. Within 3 months, the Cabinet passes on to Welsh Government the views expressed to this Inquiry regarding extending the discretionary Business Rate Relief programme, as set out in KF15 of this report.

R13. Within 3 months, the Cabinet tasks officers to explore the benefits of utilising more modern ways of using data to understand usage and behaviour patterns in the city centre, local and district centres and 15-minute neighbourhoods.

R14. Within 3 months, the Cabinet considers the suggestions for improving the experience of those using the city centre and local and district centres, as set out in Key Finding 32a-c, clarify whether resources allow for any of these to be implemented, and report back to the Economy and Culture Scrutiny Committee on the proposed way forward on these suggestions.

R15. Within 3 months, the Cabinet task officers to support FOR Cardiff to market and promote their 'Give DIFFerently' homelessness project, as set out in Key Finding 32d.

R16. Within 6 months, the Cabinet tasks officers to undertake a cost/ benefit analysis of the different models for providing Destination Marketing for Cardiff, to determine the best way forward for this service, as highlighted by KF37.

R17. Within 6 months, the Cabinet tasks officers to explore the viability of setting up a scheme to provide small sums of monies to support entrepreneurs and the growth of start-ups in Cardiff, similar to the scheme operated by Newport City Council.

R18. Within 3 months, the Cabinet tasks officers to work with key active travel stakeholders – such as Sustrans Cymru and Living Streets Cymru – to address the issues set out in Key Finding 25 and 26.

R19. Within 12 months, the Cabinet tasks officers to prepare an Affordable Workspace Policy, for inclusion in the replacement Local Development Plan, which includes consideration of the efficacy for Cardiff of space and risk registers as well as vacant unit incentives and disincentives for landlords.

This Committee will also flag the following key finding to the Children & Young People Scrutiny Committee:

KF 24 – *the need for the Council to ensure there are active travel routes to enable pupils, teachers and staff to access schools safely.* This Committee believes this should be extended to all schools not only those in the 21st Century School programme.

INTRODUCTION

1. The pressures and challenges facing the economy post-pandemic are well-documented and include:
    a. Energy, fuel and cost-of-living crises
    b. Supplies and materials issues
    c. Recruitment and retention difficulties
    d. Inflation.

2. Many of the factors affecting the economy are beyond the remit of the Council to resolve. However, Members were keen to explore what the Council could do to help Cardiff's economy post-pandemic. This Inquiry therefore focuses on areas already highlighted by the Council as areas in which it wishes to assist and considers evidence from elsewhere on what works well as well as evidence from relevant stakeholders in Cardiff on how they wish the Council to assist.

3. The report is structured by sub-topic, with key themes drawn together in the Key Findings. The sub-topics are:
    a. Changing work locations - the rise in remote working
    b. Small businesses - pressures
    c. Changing retail patterns - district and local centres and the city centre
    d. 15-minute city concept
    e. Availability and affordability of Broadband.

4. This Inquiry takes place in the context of:
    a. Welsh Government's overarching 'Programme for Government', refreshed December 2021[1], which includes many relevant commitments, and
    b. Cardiff Council's Corporate Plan 2022-25, Recovery & Renewal Plan, City Centre Recovery Action Plan and emerging Replacement Local Development Plan.

[1] Welsh Government - Programme for Government - Update

CHANGING PATTERNS IN WORK LOCATIONS

5. The COVID–19 pandemic changed the way people worked, with lockdowns meaning that significant numbers of people worked from home instead. This shift towards remote working was reflected in falling demand for office space. The Alder King Market Monitor for Cardiff, covering 2021[2] highlighted:
    a. Most enquiries and transactions were for office suites of less than 5,000 sq. ft., due to downsizing of office space because of occupiers juggling working from home and office
    b. Take-up was down 21% compared to 2020 and 53% compared to previous 5-year average
    c. Out of town deals accounted for over 50% of the total
    d. Client feedback was that most would like a return to the office in some form.

6. Regarding industrial and logistics provision, the Alder King Market Monitor for Cardiff[3] highlighted:
    a. Constant demand for space under 5,000 sq. ft., with high eaves and large yards
    b. Majority of deals in 2021 were for space under 5,000 sq. ft.
    c. Industrial portfolios are being refurbished to meet market demand.

7. The Welsh Government is keen to support a long-term shift to more people working remotely, defined as people working at or near a person's home. The aim is to achieve 30% of the Welsh workforce working at or near home in this Senedd term.[4]

8. Research for this Inquiry[5] found that 34% of respondents work remotely part-or full-time, with 32% working from home. However, 21% of respondents do not have the option to work remotely, due to the nature of their work.

[2] Market Monitor – South West of England and South Wales Property Review 2022 – January 2022 Alder_King_Market_Monitor_2022_web.pdf (alderking.com) downloaded 20 October 2022
[3] As above
[4] Smarter working: a remote working strategy for Wales – Welsh Government – 25 March 2022 available at: Smarter working: a remote working strategy for Wales [HTML] | GOV.WALES
[5] Ask Cardiff 2022- available at Appendix 7

What people want from remote working spaces

9. In recognition that working from home is not always possible or desirable, Welsh Government are working to create a network of remote working hubs in towns and communities across Wales, to trial this workplace option and assess demand and delivery options. Welsh Government commissioned research to explore views on the most important requirements for remote working hubs. 29% of respondees to this research stated their usual place of work was Cardiff.

10. The research[6] asked respondees to rate the following factors in order of importance when choosing which remote/ co-work space to use:
    a. Short distance or commute from home
    b. Near nature or green space
    c. Near Shops
    d. Near Transport Links
    e. Near Childcare and/or schools
    f. Near cycle paths
    g. Near caring responsibilities
    h. Near gym/ fitness facilities
    i. Near place of interest
    j. Near place of worship.

11. The research found that the five most important requirements when choosing a **location** were:
    a. near home
    b. near nature and green space
    c. near shops
    d. near transport links
    e. near cycle paths.

12. In terms of **facilities**, the research found the following to be most important:
    a. Broadband
    b. Online booking system
    c. Hot desks
    d. Meeting rooms.

[6] Remote Working public engagement exercise: local work hubs – Welsh Government – 16 March 2022

13. The research by Welsh Government[7] asked respondees questions about paying for use of a hub and affordability and found 26% private sector workers would be willing to pay, compared to 5% public sector workers, with the majority of all groups stating they would be reluctant to pay.

14. The Welsh Government research [8] concludes:

    Providing free to use local work hubs will need to be part of the offer in future, and the pilots will gather data so that we can devise workable options to implement the remote working hubs, and how these will be funded.'

Existing remote working and co-working spaces in Cardiff

15. There are many remote and co-working spaces in Cardiff, including commercial ventures, the Council's hubs and libraries, and numerous coffee and tea shops/ cafés that offer informal space for remote working. A quick Google search identified over 27 different venues, including office space, studios, messy spaces, and tech spaces. Some providers are commercial, whilst others are Corp B companies and social enterprises.

16. In addition, the three Universities based in Cardiff provide start-up spaces:
    a. University of South Wales – **Stiwdio** - offers dedicated start-up business support services to encourage greater levels of graduate entrepreneurship across the University of South Wales, particularly for creative industry and digital start-ups. It is based at the Atrium, Adam Street, Cardiff. Additional start-up stiwdios have also been established at Newport and Treforest campuses.
    Startup Stiwdio – USW Startup (entrepreneurship. wales)
    b. Cardiff University – **Sbarc Innovations Centre,** with co-working, offices, meeting areas, conference facilities, lab space, exhibition and presentation areas, access to professional advisors, high-speed broadband, café, and central reception.
    Cardiff Innovations@sbarc - Innovation - Cardiff University
    sbarc|spark - Campus developments - Cardiff University
    c. Cardiff Metropolitan University – **FabLab** – digital manufacturing and rapid prototyping technology, fabrication centre
    Fablab Cardiff | Digital Fabrication Lab

[7] Remote Working public engagement exercise: local work hubs – Welsh Government – 16 March 2022
[8] As above

Possible gaps in provision

17. The Inquiry heard from Gareth Jones, CEO - Town Square, that, compared to European cities, Cardiff is behind on having co-working spaces, with a low level of provision for its population size, with the number of co-working desks per capita in Cardiff low compared to somewhere like Amsterdam or London. Gareth explained that there needs to be a range of provision so that people can find their community, the place where they feel they fit.

18. Gareth Jones explained that Town Square is interested in setting up smaller-scale, local coworking for those who might not necessarily want/ need/ be able to access existing facilities but are looking to get out of their home-working environment for part of the working week or bring teams together once a week, for example. They are looking to see if it is feasible to use premises that are currently under-used in local communities, to understand what is needed for this demographic, and to understand what will benefit local communities. Gareth cited examples Town Square is currently working on, including:
    a. Llangollen, North Wales – looking at using an out-of-town active pursuits centre that is not utilised during the week
    b. Vale of Glamorgan – using a golf club
    c. Tunbridge Wells – renting 30,000 sq. ft. in Council's Town Hall

19. Jon Day, Operational Manager- Tourism and Investment, informed the Inquiry that the Council is looking to the private sector to provide coworking and office space and is looking at how the Council supports them in this. He emphasised that the provision of workspaces has to be led with a commercial focus, to be viable, as the Council does not have the same access to monies as the private sector. He added that the Council looks to include workspace in projects where this is appropriate, for example the Butetown Station House redevelopment includes workspace.

20. Richie Turner, Stiwdio – University of South Wales, highlighted the lack of affordable follow-on space in Cardiff for entrepreneurs who have completed their time at Stiwdio and/ or need more space to grow. He stressed the need for follow-on space to have a good support network of like-minded individuals who can draw on one another. He

explained that start-ups fuel net economic growth and therefore Cardiff needs them to succeed and to grow for there to be overall economic growth.

21. The Inquiry heard that FSB Cymru has been told there is a lack of small industrial units in good locations – those that are available are run-down and located in areas with high insurance costs due to security/ crime issues or in huge warehouses that have been empty for years and are not inviting. Jon Day, Operational Manager- Tourism and Investment, informed the Inquiry that the Council has workshops spread across the city, with easy in/ easy out terms. He added that there is high occupancy and strong demand for these spaces.

22. The Inquiry heard from Jess Mahoney, Creative Cardiff Manager, that there is good creative infrastructure in Cardiff and a real richness of performance venues attracting good artists as well as meanwhile uses and co-location in ex-industrial spaces. However, some of these are not accessible – for example, the Sustainable Studio space is a viable business model that performs a valuable role in the local community but is not wheelchair accessible due to the limitations of working in meanwhile, ex-industrial spaces.

23. Jess Mahoney, Creative Cardiff Manager, explained that Creative Cardiff will be asking creatives what is needed. She believes there are lots of opportunities in Cardiff for imaginative use of space, for example meanwhile use, placemaking initiatives, and creatives using empty spaces on high streets to provide experiential opportunities.

24. Members asked whether affordability of workspace is an issue in Cardiff. Jess Mahoney, Creative Cardiff Manager, responded that it is, particularly with other cost-of-living pressures, albeit that it is not such an issue as in London. Data is showing that rents are rising in Cardiff plus rents in Cardiff are significantly higher than elsewhere in the region, making it harder for creatives across the region – especially from communities with higher socio-deprivation indicators such as Merthyr and Rhondda – to access opportunities in Cardiff, meaning Cardiff is not attracting regional talent.

How Cardiff Council could help re provision of workspaces

25. This Inquiry noted that Cardiff Council's Corporate Plan 2022-25 and Recovery and Renewal Plan contain several commitments to improve the provision of workspace post-pandemic in recognition of the need to adapt to the requirements of a post-Covid economy. These include working with partners and private sector to:
    a. provide co-working, innovation and start-up hubs within communities
    b. provide creative hubs in city centre and district centres
    c. boost supply of workspace, innovation, start-up and expansion space
    d. develop proposals for a 'meanwhile use' and incubator space programme for empty and underutilised properties and places
    e. develop Tramshed Tech network
    f. develop a business case for a new Life Sciences Park.

26. This Inquiry sought views form those providing and using facilities on how Cardiff Council could help improve provision of workspaces; responses fall into the following categories:
    a. Understanding needs/ demands
    b. Identifying existing spaces
    c. Securing new spaces via strategic and policy approaches
    d. Business Rates
    e. Marketing and publicity.

Understanding needs and demands

27. This Inquiry heard the Council has an important role to play in facilitating and convening conversations around the need for workspaces, by engaging with different communities to understand their needs and the demand for various types of workspace. This then helps in providing evidence to inform planning discussions and mitigation strategies.

28. In terms of remote and co-working spaces, Gareth Jones, CEO - Town Square, highlighted that the Council has a database of those who received pandemic-related support grants (which includes freelancers and small businesses) and wondered whether the Council could use this database to ask recipients about their remote and co-working needs, to help understand demand.

29. FSB Cymru highlighted that it is important that current usage of coworking spaces is considered before new spaces are introduced, to ensure new provision does not disadvantage existing spaces.

30. In terms of creative use spaces, Jess Mahoney, Creative Cardiff Manager, explained the Council could create **risk registers** - to identify sites that are currently in creative use that would become 'at risk' through proposed development plans; the Council could then implement a mitigation plan where such occurs. She also identified that it would be useful to map cultural infrastructure, overlay planning use and proposed new developments, and so identify where cultural infrastructure could be at risk from new development. This would give time to work to identify new spaces and enable planning longer term.

31. This Inquiry also heard from Richie Turner, Stiwdio – University of South Wales, that the Council has a role to play in addressing the shortage of affordable follow-on space for start-ups that have either outgrown existing spaces or are at the end of their allocated time at the universities' start-up spaces.

32. The Royal Town Planning Institute Cymru highlighted the need for the Council to discuss the location of any neighbourhood hubs for remote working with local communities, so they are in the places they feel will work.

Identifying existing spaces

33. This Inquiry heard the Council could help identify suitable existing workspaces by:
    a. Unlocking its own under-used assets
    b. Being clear which buildings in the city it sees as key to be utilised
    c. Working with public sector partners to unlock their assets
    d. Developing a **space register** – including under-utilised sites and sites coming through the development process where developers are keen to encourage **meanwhile use**.

Space and Risk Registers

Jess Mahoney, Creative Cardiff Manager, who recently worked for the GLA explained that the GLA started the Space Register and then it trickled down to the local authority level to deliver, with the GLA collating information from the boroughs, both for opportunities and for where spaces were sought because existing spaces were at risk:

- Space registers involve working with developers to source a list of development spaces (e.g., new spaces coming forward, or development sites that are suitable for meanwhile use) that could potentially be activated by creatives for peppercorn rent.

- The GLA Cultural Infrastructure Team developed an informal online form for a risk register, where creatives completed the form if their existing space was at risk due to further development or changes to leases etc, or if they were simply looking for new opportunities (at below market rent) to grow.

- The information was then used to cross-match creatives whose spaces were at risk with developers who had spaces available, in order to ensure overall space for creatives was maintained and identify creatives to utilise opportunities and enhance locations.

Examples of Meanwhile Use of Retail Spaces

- A current example of a pop-up on Regent Street, London, delivered through the Creative Enterprise Zones, which provides experiential opportunities: Pop up space for a collective of artists from outer London boroughs – using it as a shop, place for workshops, installations, performances, during the day and night. Partnered with a charity for delivery to access 80% business rate relief, and also with Westminster Council for further reduced Business Rates (the additional 20%). It opened on 10 November 2022, initially for 3 weeks but it has been so successful that is has been extended.
- Aimie Sutton, Merthyr, - a local artist who has taken on an empty property in the town centre, providing workshops, artist studio and gallery space[9] thus reanimating underused retail space

Benefits of Creatives Meanwhile Use of Retail Space
- reanimate retail space
- provide democratic spaces where there is no pressure to buy
- brings people in and helps to make places more attractive at a street level
- overall, helps with placemaking, making spaces more desirable, which supports reactivation from an experiential, rather than functional retail, remit.

[9] This has been made possible by support from Merthyr Council's Meanwhile Scheme, Welsh Government Transforming Towns Business Fund, and Community Renewal Fund funding, as well as Merthyr Tydfil Enterprise Centre (Council and Tydfil Training) Off to a flying 'art' — local artist unveils first private gallery in Merthyr Tydfil town centre | Merthyr Tydfil County Borough Council

Strategic and policy approaches

34. Several witnesses highlighted that some other local authorities have **Affordable Workspace** policies within their local development plans, which open up space for entrepreneurs and encourage and support co-location of workspace and retail / engagement sites in the city centre through sliding scales of affordable workspace, enforced on all new development sites. Examples provided include:
    a. Islington Council - Affordable Workspace Providers | Islington Council
    b. Lambeth Council - Lambeth's Affordable Workspace Policy – this provides 12.5% of workspace in new developments at 50% market value on a sliding scale for creative use within the Brixton Creative Enterprise Zone, based on proximity to Brixton Creative Enterprise Zone.

35. The Inquiry also heard that the Council could use **incentives and disincentives** with landlords to encourage units being used and discourage empty units.

36. Creative Cardiff/ Creative Economy Unit argued for a dynamic and imaginative use of **Section 106 and Community Infrastructure Levy** to either replace lost cultural provision and infrastructure on a community level or create new capital opportunities through creative hubs or embedded workspace. They cited examples such as Fish Island, Hackney, as well as Tower Hamlets, and Haringey Councils where work had taken place to protect warehouse communities and enable meanwhile use on new developments where the intended use (i.e., ground floor retail) takes longer than anticipated to secure. They emphasised it is important to engage with the creative community to understand what is needed, to be able to have the evidence to inform s106s, clarifying that they are planning to work closely with the Economic Development unit on this.

37. Members sought the views of internal witnesses on the use of s106 and Affordable Workspace Strategies. Andrew Gregory, Director of Planning, Transport and Environment, responded that s106 in Cardiff does not deliver the same as in London, due to land costs being lower here, and that many Cardiff sites have low viability levels due to various encumbrances, which again lowers the amount that can be negotiated via s106. He emphasised that it is about balancing priorities, such as affordable housing, community facilities, green space, transport, creative space etc. and that this is a decision for Council – that there will be the opportunity to do this as part of finalising the RLDP.

38. Jess Mahoney, Creative Cardiff Manager, provided the Inquiry with an overview of her recent work in London regarding Creative Enterprise Zones:

Creative Enterprise Zones (CEZ)
In a CEZ, local authorities make commitments to protect, invest in and grow their cultural infrastructure by introducing pro-cultural policies, and advocating for the needs of the creative sector to be hard-wired into proposed developments. Examples of local authorities with CEZs include Hackney, Tower Hamlets, Lewisham and Haringey.

Creative Enterprise Zones were established based on a framework of four pillars designed to enable creatives and embed culture in communities for the long-term. These were –
Space – for artists to live, make and work
Skills – enable businesses to achieve their growth potential through addressing specific creative sector skills gaps and also democratising start-up culture within the creative industries and breaking down barriers to enable diverse involvement
Community – engage and embed creative activity within communities, avoiding silos and working in transparent ways that engaged community members with creative activities from the ground-up, reiterating that creative opportunities are open to all, not just affluent people. Creating 'shop windows' to local creative activities so that creative production becomes more engaging and visible.
Pro-cultural policy – underpinning activities and included in local authorities' local plans, new policy development and via SPGs etc.

Whilst it may not be possible to implement exactly the same model in Cardiff, due to differing landscapes, there is potential to:
- **Use the principles** of the CEZ programme (space, skills, community and policy) to drive creative industries support initiatives across the whole city
- **Use the CEZ model** across the Cardiff capital region, supporting growth in the sector within Cardiff and its surrounding boroughs.

39. Jess Mahoney, Creative Cardiff Manager, explained she is thinking about how to map the CEZ model here in a way that works for Cardiff and the surrounding region and is keen to engage with the council and partners in the Cardiff Capital Region and relevant local authorities to begin to deliver this. The aim would be to follow a pilot/pathfinder model to enable proof of concept and then roll-out once sure it is the right approach.

40. FSB Cymru stated one of their members had asked whether the Council could buy empty warehouses and turn them into smaller units – not just in the city centre but across Cardiff.

Business Rates

41. This Inquiry heard that the Council could help workspace provision by looking again at the business rates for specific units or specific usages, including:
    a. business rates for units above retail to encourage these to be used e.g., the Council could put in place a system of charging a Corp B company less as, whilst they are not social enterprises or charities, they have positive socio-economic and environmental impacts.
    b. Extension of discretionary Business Rate Relief programmes to creative sector businesses – supporting new enterprises to become established in the city where businesses providing social or community value, on a sliding scale to support sustainability
    c. Business rates reductions to support pop-up usage in High Streets to reanimate spaces e.g., Westminster Council re Regent St pop-up, Haifa Studios wanting to work in Cardiff

Business Rates - Westminster Council – Regent Street
Westminster Council cut business rates for a meanwhile use pop-up on Regent Street. They were able to do this as one of the partners – Hypha Studios – is a registered charity and so eligible for 80% discount. Westminster Council then decided to write off the remaining rates due to the benefit to the local economy and surrounding areas.

Marketing and Publicity

42. Some witnesses felt the Council could help with provision of workspace by being involved in a publicity campaign to raise awareness of coworking, what it is and why it is beneficial.

SMALL BUSINESSES

Overall Economic Position

43. The impact of the pandemic has been compounded by the recent energy, fuel and cost-of-living crises, as well as increasing input and insurance costs. FSB Cymru have highlighted that their members face:

> *'...soaring costs, rampant inflation, falling revenues, difficulty accessing affordable finance and a rise in invoices being paid late'*
>
> *'Our latest Small Business Index results suggest almost 35,000 small businesses in Wales are expecting to downsize, close or sell their business in the coming months. The urgency to support the small business economy cannot be overstated.'* [10]

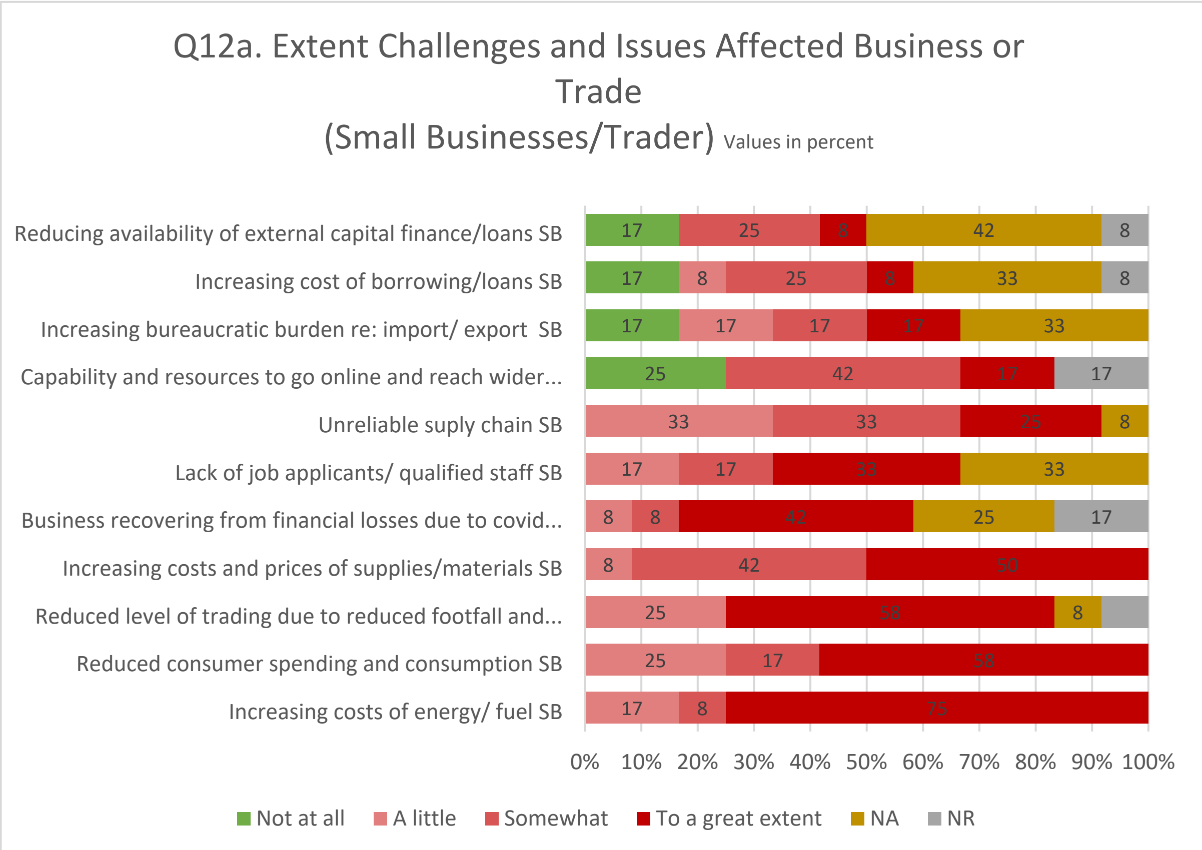
44. FSB Cymru informed this Inquiry that the position in Cardiff broadly mirrors the national picture[11] and represents a huge issue for Cardiff businesses. A survey of 25 Cardiff businesses, undertaken by FSB Cymru to inform this Inquiry, coupled with their more informal discussions with Cardiff businesses, shows:
    a. 79% respondents face increased fuel costs
    b. 78% respondents face increased energy costs
    c. 76% respondents face increased Materials/ Supplies costs
    d. 65% respondents face increased Staffing costs
    e. 64% respondents face increased Insurance – costs
    f. 63% respondents face increased Cost of Finance costs

45. FSB Cymru also highlighted to the Inquiry that small businesses in Cardiff face:
    a. Demand pressures - 38% increasing demand, 29% decreasing demand, and 33% demand the same
    b. Recruitment issues – particularly in the hospitality sector. Members heard this is due to:
        - Lack of availability of staff able to hit the ground running
        - Applicants not 'work-ready' – requiring training/ soft skills
        - Applicants not willing to work weekends/ late evenings
        - Applicants wanting flexibility

[10] FSB Wales comment on Autumn Statement | FSB, The Federation of Small Businesses
[11] Further information on FSB UK surveys is available at Appendix 3

46. FSB Cymru explained that recruitment issues impact on the ability of small businesses to maximise income (as having to scale back operations often) and that, even if there is demand, they cannot grow / expand as there are not skilled staff available.

47. The findings of this Inquiry's own research[12] mirrors the above:



48. All of the respondents (100%) indicated that increasing costs of energy and fuel, reduced consumer spending, and increasing costs and prices of supplies and materials have adversely affected them, with between 50% - 75% confirming these issues have affected them 'to a great extent'. Reduced trading due to reduced footfall was also a key issue identified by 83% as having affected their business or trade to different extents.

[12] Available at Appendix 6

How Cardiff Council could help small businesses post-pandemic

49. This Inquiry sought views on how Cardiff Council could help support small businesses recover post-pandemic; responses fall into the following categories
    a. Strategic approach
    b. Partnership working
        - Business support
        - Skills and training
    c. Financial support
        - Business rates
        - other
    d. Improve Council interface with small business
        - Procurement
        - Planning
        - Licensing
    e. Clarify re congestion charge.

Strategic Approach

50. FSB Cymru explained they feel that the Council should affirm their commitment to small businesses and self-employed and demonstrate this by their actions. They called on the Council to develop a comprehensive commercial plan to deal with the current position, addressing the many aspects facing small businesses in Cardiff and adopting a pro-small business culture. They highlighted they had heard from their members that the Council needs to support permanent businesses rather than supporting seasonal businesses at the expense of existing businesses e.g., cafés and hospitality venues.

Partnership working

51. FSB Cymru highlighted their members view that there is a need to provide advice and guidance to small businesses. They stressed that this did not mean that the Council needed to provide the business support but be able to signpost to organisations that can provide support to business, particularly about how small businesses can become more sustainable.

52. FSB Cymru highlighted it was important for Cardiff Council to look at how City Deal initiatives relate to small businesses and how they could benefit them. In particular, they highlighted the need for Cardiff Council to work with the Cardiff Capital Region City Deal Skills Partnership to encourage them to establish training and support to address recruitment issues facing small businesses in Cardiff and region, rather than solely focusing on larger businesses and projects.

Financial Support

53. FSB Cymru highlighted the need to make business rates more proportionate and for there to be rate relief for certain sectors, such as hospitality. On 13 December 2022, the Welsh Government announced £460m over the next two financial years, to provide business rate relief across Wales. This includes freezing non-domestic rates multiplier, to ensure there is no inflationary increase, providing transitional relief to all ratepayers whose bills increase by more than £300 following the UK-wide revaluation exercise, which takes effect on 1 April 2023, and 75% non-domestic rate relief to eligible businesses in the retail, leisure and hospitality sectors.[13]

54. FSB Cymru emphasised the need for the Shared Prosperity Fund grant terms for small businesses to be framed to be practical for small business and not require prohibitive contributions.

55. The Inquiry also heard from Richie Turner, Stiwdio – University of South Wales, that the Council could work with private sector lenders to underwrite small loans (£2k) to selected start-ups; with the Council underwriting the loans, private sector lenders would then feel able to offer reduced rates for loans, making it affordable for start-ups. The Council could use criteria such as job creation in Cardiff as part of the assessment process to determine which start-ups to support. He highlighted that Newport City Council operates a Young Person Start-Up Fund for under 25-years olds, to complement the Welsh Government's Barrier Fund that is available to start-ups by individuals who are economically inactive, unemployed and over 25-years old.

[13] £460m in rates support to help businesses struggling with cost rises | Welsh Government | Official Press Release (wired-gov.net)

Improve Council interface with small business

56. FSB Cymru highlighted that there are many aspects of the Council that interface with small businesses, including procurement, planning and licensing.
57. With regard to procurement, FSB Cymru informed the Inquiry they were in discussion with the Council's procurement team about how to improve procurement processes to make these more small-business friendly, which they welcomed.

58. FSB Cymru also highlighted their members' view that planning and licensing processes need to be reviewed to simplify and speed-up processes, particularly at the moment when costs are increasing rapidly, and projects may become unaffordable if it takes too long to get relevant permissions.

Clarify congestion charge

59. Both FSB Cymru and For Cardiff highlighted that it would be useful to have clarification on whether or not there is going to be a congestion charge and how this would work. FSB Cymru emphasised the need to engage small businesses to discuss how this could be implemented to encourage decarbonisation without adversely affecting small businesses in Cardiff e.g. work with all tiers of government – UK and Welsh – to provide advice and support to businesses to show them how some of them could utilise active travel, whilst at the same time ensuring those businesses that do require a vehicle are supported to use an electric vehicle by installing infrastructure and providing advice and guidance and lobbying for incentives for electric vehicles for businesses.

CHANGING RETAIL PATTERNS

60. Prior to the pandemic retail spaces were being affected by:
    a. Economic recession *(2008 onwards)*
    b. Market uncertainties
    c. Higher operating costs – such as wages, rents, and business rates
    d. Acceleration of e-commerce and digitisation
    e. Rise in online spending
    f. Changes in shopping habits
    g. Growth in number of out-of-town outlets.[14]

61. The above pressures led to changes in retail spaces even before the pandemic, as evidenced by the REPAIR project[15], which examined changes in retail between 2000-2021 in Edinburgh, Glasgow, Hull, Liverpool and Nottingham. It found retail dominated in early 2000's but by 2017 retail was reduced with more of a mix of offices, commerce and storage, food and beverage, convenience retailing, serviced apartments, residential accommodation, entertainment, leisure and recreation and empty properties.

Impact of Pandemic on City Centres

62. The covid pandemic led to considerable changes in people's shopping, working, travelling and entertaining. These accelerated changes to established consumer behaviour, with a significant reduction in in-person shopping, and reduced footfall in city centres. A systemic review of literature on city centre retail and the impact of the pandemic identifies the following[16]:
    a. Growth in online shopping means retailers need to acquire online presence or risk bankruptcy
    b. Specific sectors faced more challenges e.g., entertainment, dining, and tourism
    c. Decline in footfall in city centres poses a threat to their vitality and attractiveness
    d. Increase in vacant retail spaces and offices in city centres since start of pandemic

[14] Taken from – The Impact of the Covid-19 Pandemic on Retail in City Centres – Lashgari, Y.S.,; Shahad, S. – Sustainability 2022, 14, 11463. https://doi.org/10.3390/su141811463
[15] Real Estate, Place Adaptation, and Innovation within an integrated Retailing system (REPAIR) End of Project Report – Retail Change and Transition in UK City Centres - 2022
[16] As 14 above

e. Changing demand for retail space has led to increasing demand for flexibility among tenants e.g., asking for short-term leases or long-term leases with a break clause.

63. The study also identified the following:
   a. Increase in local shopping during pandemic
   b. Trajectory of retail in city centres is for retailing to adopt digital transformation strategies to remain economically viable
   c. Working from home, remote working and hybrid working expected to continue
   d. Reduction in city centre living may exacerbate decline of city centre retail
   e. Increase in individual modes of transport at expense of collective modes of transport
   f. Increased importance of greenspace.[17]

64. Lichfields produced an Insight Focus[18] report in September 2020 exploring how young people (16–25-year-olds) use town centres. This found:
   a. 39% browse and order online
   b. 33% browse and buy in store
   c. 17% browse online and buy in store
   d. 6% browse in store and buy online

65. Lichfields report[19] also shows the following are the main reasons why young people visit town centres:
   a. 59% to eat out
   b. 47% non-food shopping
   c. 47% to browse shops
   d. 46% to meet friends
   e. 40% to visit a bar or pub.

[17] Taken from – The Impact of the Covid-19 Pandemic on Retail in City Centres – Lashgari, Y.S.,; Shahad, S. – Sustainability 2022, 14, 11463. https://doi.org/10.3390/su141811463
[18] The Next Generation – the future of our town centres – Lichfields - September 2020 the-next-generation-the-future-of-our-town-centres_sep-20.pdf downloaded 20 October 2022
[19] As above

Cardiff City Centre

66. The Alder King Market Monitor for Cardiff, published in January 2022[20] highlighted:
    a. In 2021, take-up of office space across Cardiff is down 21% compared to previous year, and 53% down on 5-year average – out of town deals account for over 50% of total
    b. In August 2021, the Wales Retail Consortium reported a 14.4% decrease in footfall in Cardiff on two years ago, the shallowest decline of any UK nation
    c. In 2021, 68,000 sq. ft. of new letting in SD2 – Phase Eight, Hobbs, Rituals (new to Wales), Zara, Breitling, Morphe, Mallows Beauty, and Sky. [21]

67. Adrian Field, Executive Director – FOR Cardiff explained the main issues and challenges facing Cardiff city centre businesses post pandemic are:
    a. Recruitment and retention of staff, particularly in retail and hospitality, because staff do not want to work unsocial hours, and in mid-high professional services, because hybrid working is making it easier for the latter to live in Cardiff and work in London etc. The impact is that businesses are having to close earlier or only open on reduced days per week.
    b. Attitude of some customers – some seem to be curter to retail staff
    c. Large businesses not returning to office – affects some trades as less footfall

68. Adrian Field, Executive Director – FOR Cardiff explained that, whilst footfall is down, spend per head has increased, indicating people come in when they know they are going to purchase as opposed to browse.

69. The statement to Council on 24 November 2022 by Councillor Goodway, Cabinet Member – Investment and Development, included:

    'Councillors will be pleased to learn that the city centre continues to outperform its rivals in terms of footfall, and there remains significant interest from an investment perspective with a number of new premises opening over the last month, including the likes of Proud Mary who have made a substantial investment in the city centre.'

[20] Market Monitor – South West of England and South Wales Property Review 2022 – January 2022
Alder_King_Market_Monitor_2022_web.pdf (alderking.com) downloaded 20 October 2022
[21] Market Monitor – South West of England and South Wales Property Review 2022 – January 2022
Alder_King_Market_Monitor_2022_web.pdf (alderking.com) downloaded 20 October 2022

'Cardiff is also beginning to promote the city centre for Christmas activity and, so far, the number of 'hits' that have been received on the Visit Cardiff website has exceeded records. In promoting Cardiff as a Christmas destination, the Council will also work with the likes of Great Western Railway to promote the city as a shopping destination across their network.'

'I am also pleased to report that much of the hospitality trade is reporting a positive outlook up until Christmas, but concerns remain that the impact of the cost-of-living crisis will become more stark as we move into the New Year if the national economic picture gets worse.'

'A survey of city centre businesses also suggested that most were looking at expanding their footprint over the next twelve months as most also reported an increasing number of people returning to the workplace.'

How can local authorities help create sustainable city centres, post-pandemic?

70. This Inquiry considered research on what is needed to ensure city centres recover and are sustainable post-pandemic, and what it is that local authorities can do to assist. The Inquiry heard that the systemic literature review study makes the following policy recommendations to ensure a sustainable future for city centres:
    a. Repurpose some of vacant and underperforming retail space in city centres - to perform other functions, including residential use. However, it is recognised that repurposing some retail units, particularly smaller units, is not always feasible
    b. Adopt experience economy strategies – give people a reason to visit city centres beyond shopping – integrate leisure and entertainment
    c. Create episodic retail space – i.e., focus on unique cultural features of your particular city centre, as well as provide a good environment that impresses shoppers and visitors e.g., optimise convenience by ensuring travel in/out/around is good, signage is clear, leisure is facilitated, and social interaction is encouraged. Place branding is an important feature of this.[22]

[22] Taken from – The Impact of the Covid-19 Pandemic on Retail in City Centres – Lashgari, Y.S.,; Shahad, S. – Sustainability 2022, 14, 11463. https://doi.org/10.3390/su141811463

71. The Inquiry also heard that the REPAIR report[23] makes a number of policy recommendations for local authorities, including:

    Placemaking:

    a. Developing shared vision city centre masterplans
    b. Create high street policy plans
    c. Established designated urban vibrancy areas
    d. Develop vacant shop strategies
    e. Introduce city centre event strategies
    f. Establish ownership and occupier property databases
    g. Develop standardised micro-level diversity metrics
    h. Increase monitoring of city centre change

    Planning:

    i. Ring-fence s106, s75 and s76 monies from repurposing schemes - to spend in vicinity of scheme
    j. Expand planning obligations to cover an affordable retail space provision for city centre planning consents to help establish a more resilient framework for city centre retailing.

What else could Cardiff Council do to assist city centre recovery?

72. This Inquiry sought the views of witnesses on what they felt Cardiff Council should do to assist the recovery of the city centre post-pandemic, bearing in mind the Council is already implementing its City Centre Recovery Action Plan.

Annual Review of Policy

73. Adrian Field, Executive Director – FOR Cardiff, stated that it was good to have been involved in the City Centre Action Recovery Plan. He emphasised that it is important for the Council to be agile and to be able to respond swiftly to changes – to not be afraid of reviewing these strategies and action plans on an annual basis as things are moving so quickly and need to ensure actions are still appropriate and relevant, so that can divert accordingly, if needed.

[23] Real Estate, Place Adaptation, and Innovation within an integrated Retailing system (REPAIR) End of Project Report – Retail Change and Transition in UK City Centres - 2022

Partnership Working

74. Adrian Field, Executive Director – FOR Cardiff, highlighted the need for Cardiff Council to take the opportunity to work more closely with regional partners, such as Cardiff Capital Region City Deal, on issues such as economic development, tourism and marketing.

Funding

75. Adrian Field, Executive Director – FOR Cardiff, emphasised that the Shared Prosperity Fund funding opportunity needs to be fully embraced to support reimagination of the city centre.

Use of data

76. Adrian Field, Executive Director – FOR Cardiff, highlighted that Cardiff needs more catchment data i.e., to use mobile phone usage data to show where visitors are from, dwell time, spend etc. He explained that FOR Cardiff is looking at this and emphasised this data would also be useful for Meet Cardiff and Visit Cardiff colleagues and the City Centre Management Team. He cited Movement Strategies that costs circa £40K per annum and provide a whole host of data and layers, so that they can produce heat maps etc. to show movement in Cardiff. Adrian added this would be useful for businesses but also for event management and for marketing activity, enabling it to be effectively targeted. Adrian added that FOR Cardiff has budgeted for this but that it would be very helpful is there was other funding available as well, for example some of the Shared Prosperity Funding could be used for this.

77. Adrian Field, Executive Director – FOR Cardiff, highlighted that it would be interesting to do research to understand the changing habits of residents re use of city centre and use of local and district centres.

Improving the experience

78. Adrian Field, Executive Director – FOR Cardiff, explained the following would help to improve the experience of those using the city centre:
    a. more space provided for socialising, with more tables and chairs outside, as this is what residents and visitors are looking for when they visit the city centre
    b. another visitor attraction now that the Dr Who exhibition is no longer available

c. a strong public transport network later into the night – this would be good for visitors, for employees and for employers who struggle to attract staff to work later as it is too expensive for them to get home and/ or they feel unsafe getting home
d. assistance to share good practice amongst businesses on how they can best reconfigure their space to promote active travel
e. tackling begging more proactively – as has been done in Newport with Public Space Protection Order
f. assisting FOR Cardiff to promote and market their homelessness project '*Give DIFFerently*', which is due to be relaunched shortly
g. to look again at the proposed busking strategy and byelaws – to help promote good busking that adds to the ambience and tackle poor busking that is detrimental to nearby businesses.

79. Roisin Willmott, Director - RTPI Cymru, emphasised the important role the city centre plays for Cardiff residents and regionally and nationally, and how important it is therefore, to ensure it is viable and that it keeps the big retail stores.

80. Adrian Field, Executive Director, FOR Cardiff, highlighted that, in other parts of the UK, Destination Marketing is undertaken by the BID, such as in Lincolnshire and Cambridge; in Cardiff, the Council undertakes it, via Meet Cardiff and Visit Cardiff. He wondered whether this was an opportunity for the Council to make savings whilst at the same time improving the offer. He stated that he would be happy to talk about this further with the Council and that FOR Cardiff would be able to raise funding from its members to support a DMO.

81. This Inquiry's own research[24] asked specific questions on how the city centre could be transformed as part of the 15-minute city concept, and found:
a. 53% agree that the city centre could increase its role in:
- Recreation
- provision of green and communal space
- tourism and visitors
- access to culture and arts

[24] Available at Appendix 6

b. 47% agree that the city centre will continue to 'provide night-time economy', eating and drinking establishments, as well as shopping and retail
c. 38% agree that the city centre could increase its role in highlighting its history.

Impact of Pandemic – High Streets

82. In January 2021, Deloitte published a report[25] exploring the changing role of the UK high street[26]. Using data from this report, Deloitte argue that the Covid-19 pandemic led to a number of trends that support local high streets as opposed to city centres:

a. Increased focus on localism
b. Greater level of commitment to small independent businesses that can easily identify the provenance of their goods
c. More focused shopping missions with higher spend but fewer trips
d. More value place on the 'self' and socialising rather than out and out consumerism.[27]

83. The Centre for Cities, using near-real-time footfall and spend data[28], highlight suburban high streets had less of a rough ride than city centres during the pandemic:

a. the average city centre high street lost 28 weeks of sales between March 2020-September 2021, comparted to suburban high street losing 9 weeks of sales
b. Suburban high streets had a slower rise in vacancy rates compared to city centre vacancy rates, a 1% increase compared to 3.3% increase
c. Suburban spend returned quicker to its baseline spending levels when the economy reopened in Summer 2021.[29]

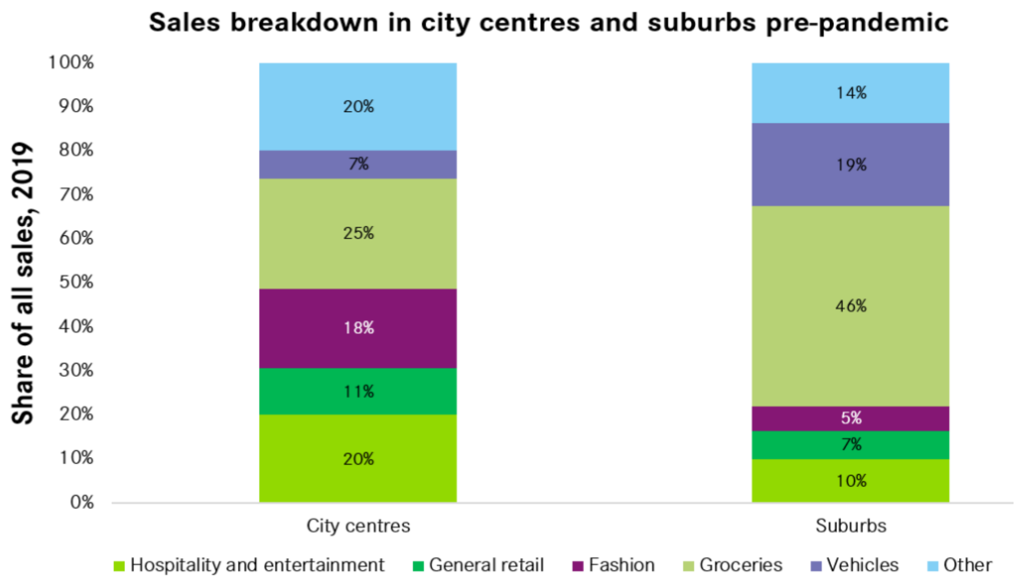
84. Centre for Cities[30] identify that the following factors account for suburban high streets doing well in the pandemic:

a. Local Sales - In 2019, nearly 60% of sales in suburbs came from the suburbs themselves – so most of their customer base was still there during the pandemic unlike city centres that rely on people coming into the city

[25] What next for the high street?: part two – A revival – Deloitte – January 2021 – downloaded 14 October 2022
[26] This includes high streets in local and district centres
[27] What next for the high street? Part two: A Revival – Deloitte January 2021
[28] High streets | Centre for Cities
[29] Have suburban high streets really received a 'work from home' boost? | Centre for Cities – downloaded 24/11/22
[30] High streets | Centre for Cities

b. Essential Goods - Pre-pandemic, nearly two-thirds of all sales in suburban high streets occurred in essential sectors such as groceries and many of these could continue to be open during the pandemic.

Figure 5: Before the pandemic, shoppers spent their money differently in city centres and local high streets



Work from Home Dividend?

85. Centre for Cities highlight that footfall and spending data show no clear signs of a work from home dividend for suburban high streets.

'In September 2021, the suburbs of cities with high levels of remote working did less well than those with low levels of remote working – and they performed just like they did before, not better. For there to be a 'work-from-home boost', the opposite should be true.'[31]

86. The What Works Centre for Local Economic Growth also highlights there is not much evidence that more working from home will significantly boost local high street retail.[32]

What is needed for sustainable high streets, post-pandemic?[33]

87. This Inquiry found that high streets need to:

a. Reflect local demographics

[31] Have suburban high streets really received a 'work from home' boost? | Centre for Cities – downloaded 24/11/22
[32] Evidence Briefing: local growth, high streets and town centres – What Works Centre for Local Economic Growth - 2021
[33] Further information on this section is available in Appendix 3

b. Reflect changing shopping habits
c. Create the right environment
d. Move away from an over-reliance on retail towards the 'experience' leisure economy
e. Deliver low-cost workspace to support start-ups, training and those wishing and able to work closer to home

88. This Inquiry found that there is a need to:
    a. Rethink the landlord tenant relationship
    b. Shape and fund regeneration
        - Widen footpaths
        - Provide space for cafes
        - Create accessible transport stops
        - Prioritise active travel
    c. Increase consumer demand
        - Improve the skills of residents
    d. Utilise vacant shops as 'test sites' for new businesses
    e. Activate local community facilities, to help footfall and sense of community
    f. Innovate funding and delivery mechanisms – meanwhile use, BIDs

How can local authorities help create sustainable high streets, post-pandemic?

89. The LGA commissioned Pragmatix Associates and Trajectory to identify how councils can help create resilient and revitalised high streets beyond the pandemic[34]. Their report identifies that social and experiential use of high streets have been increasing pre and post pandemic. They identify **retaining footfall and spending** as key challenges for suburban high streets, post pandemic.

90. The LGA report argues for the need for suburban high streets to develop a broader, high value offer with convenience and flexibility to remain engaging and accessible. In summary, the LGA report states that[35]:

[34] Creating resilient and revitalised high streets in the 'new normal' | Local Government Association
[35] Creating resilient and revitalised high streets in the 'new normal' | Local Government Association downloaded 24/11/22

Resilient high streets of the future

Resilient high streets are experiential destinations and should offer users experiences that go beyond purely retail or functional-oriented activities.

Resilient high streets have flexibility built in: Rapid technological changes offer challenges and opportunities for high streets. Flexibility can be integrated into the high street through evidence-based strategy, policy amendments, and up-to-date awareness of community needs and demands. Resilient high streets are green, and local authorities should consider transport, green spaces, and low-carbon supply chains in any environmental strategy.

Resilient high streets make sense in their local context: Local authorities should design policy interventions based on a contextual understanding of the high street in question, and the needs and demands of its users. Community engagement can be used to build important partnerships and provide valuable insights which can support the design and delivery of projects.

Councils' contribution to successful high streets

Strategic evidence-based approach: High Street resilience should be guided by medium- and long-term strategy, founded in quantitative and qualitative evidence. Prior to developing a strategy, it is important that local authorities understand the economic and social context of local high streets and have relevant staff expertise. Planning policies, such as local plans and neighbourhood plans, can be used as a binding foundation for a high street strategy, safeguarding green spaces and heritage assets. Policy interventions should be consistent with the council's high street strategy.

Financial viability and social benefit: As with any investment, projects designed to strengthen and reinvigorate the high street need to be financially viable and deliver clear social benefit. To increase the financial viability of socially beneficial interventions, sources of government funding are available (such as from the Levelling Up, Community Renewal, Shared Prosperity and Active Travel Funds), and there are mechanisms for sharing risk. Local authorities can invest in interventions which could have a significant impact on high streets, but poor financial planning risks undermining potential benefits.

Engaging and empowering stakeholders: Engaging with community organisations and residents can facilitate interaction with hard-to-reach groups and provide important insight when designing interventions. Local businesses, both independents and chains, will be able to provide commercial insights about footfall, consumer preferences, and supply chain concerns. Engagement with community stakeholders can help to identify and address skills gaps in the high street.

91. In September 2021, Audit Wales published their report '*Regenerating Town Centres in Wales*', which concludes with 6 recommendations, including 2 for local authorities, as follows:

R4 – *We recommend that local authorities take appropriate action, using these existing powers and resources available to achieve the best possible outcome for town centres by:*

- *Using alternative methods of enforcement before using Compulsory Purchase Orders as a last resort*

- *Integrating enforcement strategies with wider departmental strategies across housing, environmental health, planning and regeneration teams to make more effective use of existing skills and resources, and*
- *Ensuring there is capacity and the right expertise to use the full range of powers, working in collaboration with other councils to achieve good outcomes.*

R6- *We recommend that local authorities use our regeneration tool to self-assess their current approaches to identify where they need to improve their work on town-centre regeneration.*

Cardiff's District and Local Centres

92. The Welsh Government's Technical Advice Note 4 (1996) defines a district shopping centre as groups of shops, separate from the town centre, usually containing at least one food supermarket or superstore and non-retail services such as banks, building societies and restaurants.

93. There is no fixed definition for local centres – they are smaller than district centres, larger than neighbourhood centres, and also contain a mix of retail and non-retail.

94. The Council has a District Centre Strategy (2011), which states there are 11 district centres in Cardiff:

    a. Albany Road/ Wellfield Road
    b. City Road
    c. Clifton Street
    d. Cowbridge Road East
    e. Crwys Road/ Woodville Road
    f. Mermaid Quay
    g. Merthyr Road
    h. Penarth Road/ Clare Road
    i. St Mellons
    j. Thornhill
    k. Whitchurch Road

95. The District Centre Strategy contains a map that shows the local centres are:

    a. Birchgrove
    b. Bute Street
    c. Cathedral Road/ Pontcanna Street
    d. Countisbury Avenue
    e. Fairwater Green
    f. Gabalfa Avenue

g. Grand Avenue
h. Llandaff High Street
i. Maelfa, Llanedeyrn
j. Newport Road, Rumney
k. Radyr
l. Rhiwbina
m. Salisbury Road
n. Splott Road
o. Station Road Llandaff North
p. Station Road Llanishen
q. Tudor Street
r. Wilson Road.

What could Cardiff Council do to assist local and district shopping centres?

96. This Inquiry sought the views of witnesses on what they felt Cardiff Council should do to assist local and district centres post-pandemic, bearing in mind the Council's commitments in its Corporate Plan 2022-2025 and Recovery and Renewal Plan, as set out in Appendix 1.

97. Members wished to hear from local and district shopping centre traders and tried to locate traders' associations, without success. Members therefore invited two traders – one from a District Centre and one from a Local Centre – to meet with them to share their ideas. Both traders have traded in Cardiff for many years and have previously been involved in traders' associations.

Establish a Traders Forum

98. The traders told Members that it would be helpful if the Council organised a forum in each centre, given the decline in trading associations across Cardiff. They emphasised that these are a good way to share information and that it requires the Council to lead on this as otherwise the fora are not sustainable as volunteers understandably cannot volunteer forever and need help to organise legacy arrangements, as has been borne out by previous traders' associations ceasing to operate.

99. The traders explained it would make sense for this to be done on a centre-by-centre basis rather than one overall forum, as the issues vary so widely across Cardiff.

Promoting Centres

100. The traders explained the Council could use its social media presence to:
   a. promote the centres
   b. encourage 'shop local'
   c. generate ideas and interests in local communities to support the centres.

Improving the Experience

101. The traders explained the following would help to improve the experience of those using local and district centres:
   a. Enable restaurants, coffee shops and cafés to have benches, tables and chairs on pavements - helps create a community feel and increase trade
   b. Brighten up centres with low-cost actions, including
      - Lamp post banners – promoting 'shop local' and maybe in different colours for the different centres to give them their own identity
      - Greening – planters – like on Newport Road – with local shops nominated to water them and provided with necessary water hooks
      - Rubbish bins
   c. Help meet the cost of local community events – with the increase in food and drinks and national companies, there are fewer independent traders to bear the cost of local events, which help to create a community feel
   d. Tackle shoplifting and begging
      - Liaise with Police to see if possible to increase local Police Community Support Officer patrols
      - Organise Local Radio-Net systems
   e. Tackle homelessness.

Improving Access

102. Members included questions in their own survey[36] on respondents' views on what is needed to improve access to local and district centres, and found the following is needed:
   a. 77% - provision of frequent and reliable public transportation
   b. 71% - the provision of safe walking routes

[36] Available at Appendix 6

c. 53% - provision of safe cycling routes are needed
d. 50% - increased disabled parking
e. 47% - increase the need for parking space for non-motorised vehicles

103. In addition, the two traders the Inquiry heard from highlighted:
   a. The opportunity to add an additional 6-8 parking spaces near to Wellfield Road, by redesignating spaces and enforcing these so that people do not overstay
   b. That, in some centres, traders can see both sides re parking – there are mixed views on whether the Council should be tougher on enforcing double-yellow lines, so people have to use nearby car park, or softer and remove parking restrictions, so easier for people to access shops.

Funding

104. Adrian Field, Executive Director – FOR Cardiff, highlighted that district centres could look at establishing their own Business Improvement Districts (BID). He explained Cllr Elsmore has had discussions with him about having a BID for Cowbridge Road East district centre, and they are due to have a meeting with traders in January. He continued that his initial calculations indicate this could raise circa £80k to go towards events, such as Christmas Lights. Adrian explained this could be another avenue explored by the Council.

105. Roisin Willmott, Director RTPI Cymru, stated that Cardiff has strong neighbourhood centres, and the key is to strengthen these in line with Welsh Government's Town Centre First approach, which also covers neighbourhood centres.

Cardiff Council's proposals to date

106. Cardiff Council has worked with partners to develop a detailed City Centre Action Recovery Plan. This Inquiry did not focus on the delivery of the Plan, as this would require its own focused scrutiny, but asked witnesses for their views on the Plan; these are incorporated in this report under the appropriate headings.

107. Cardiff Council's Corporate Plan 2022-23 contains the following commitments re local and district centres:

a. Establish a '15-minute city toolkit' to accelerate district centre regeneration, including housing- and transport-led improvements
b. New Regeneration Strategy to support 15-minute principles
c. Support the vitality and viability of district and local centres and deliver the'15-minute city' approach to all major centres by 2027.

108. Specifically with regard to local and district centres, Andrew Gregory, Director of Planning, Transport and Environment, explained that the council will develop neighbourhood/ placemaking plans for priority areas, which will tempt private developers to invest in the areas as the plans will be so good. These plans will set out relevant policies and funding streams and will align programmes and projects across the council. Rebecca Hooper, Operational Manager Neighbourhood Regeneration, added that these placemaking plans are required by Welsh Government as part of funding applications for Transforming Towns monies.

109. Councillor Wild, Cabinet Member – Climate Change, emphasised how pleasing it is to see departments working well together – Economic Development, Regeneration, Planning and Transport – to develop the Regeneration Strategy, which is all to do with supporting district and local centres and the principles of 15-minute neighbourhoods.

110. Rebecca Hooper, Operational Manager Neighbourhood Regeneration, added that the Regeneration Strategy will set the agenda for improvements to District and Local Centres and will embed the 15-minute neighbourhood principles.

111. Andrew Gregory, Director of Planning, Transport and Environment, highlighted the Council has very few policy levers that it can pull regarding district and local centres, other than to improve the public realm, improve transport and active travel, as it does not own many assets in these centres. Councillor Goodway, Cabinet Member – Investment and Development, added that if the Council could add in housing to centres, this would help to generate footfall to support the viability of centres. Successful examples of this include schemes such as the Maelfa Regeneration in Llanedeyrn.

112. Rebecca Hooper, Operational Manager Neighbourhood Regeneration, highlighted that local and district centre regeneration schemes are not always easy, due to conflicting views between traders and between traders and the council, along with wider aspirations that the community or shoppers may have- they do not always align. The Council has to act for the greater good – for example putting in cycleways.

113. Rebecca Hooper, Operational Manager Neighbourhood Regeneration, emphasised that, when liaising with local and district centres, it is important to manage expectations, be clear what is possible, be honest, focus on what matters to help businesses grow and to help increase footfall. She added that it was also important to be proportionate, there is a small team available to do this work. She added that the team are planning to commence community and trader engagement in early 2023 to look at issues and possible solutions for a priority district centre, Cowbridge Road East.

114. Members asked whether big improvement schemes deliver lasting results, and whether smaller actions which don't cost much, such as those highlighted to this Inquiry – prettying up the centres with planters and banners – would help to generate pride, give a lift to the area and attract footfall, helping to improve viability of centres and small traders. Councillor Wild, Cabinet Member – Climate Change, responded that this was a good point. Jon Day, Operational Manager -Tourism and Investment, added that there needs to be a hierarchy to focus resources, efforts and funding across a number of teams.

115. Members sought views on the management of centres. Andrew Gregory, Director of Planning, Transport and Environment, highlighted the importance of joining up and improving management of centres now, stating it is important to use resources more effectively now and focus monies on the areas that require the biggest actions. He added that expanding the City Centre Management Team to cover the District and Local Centres would be helpful. Rebecca Hooper, Operational Manager, Neighbourhood Regeneration, added that, if money was no object, then a district centre manager would be a dream as they would be able to manage all the council services interfaces and work with local traders to improve the centres – currently her team parachute in, do the work, and leave and the traders are left with no one contact point in the Council. She

added that this would really help, as there are no trader associations left anymore and so no easy conduit between centres and the Council.

116. Councillor Goodway, Cabinet Member – Investment and Development, wondered whether the Council was doing enough to promote local and district centres and days such as Small Business Saturday. Jon Day, Operational Manager, Tourism and Investment, highlighted that Visit Cardiff has sections on District Centres that have a minimum offer – such as food and drink – and warrant visits from outside the locality.

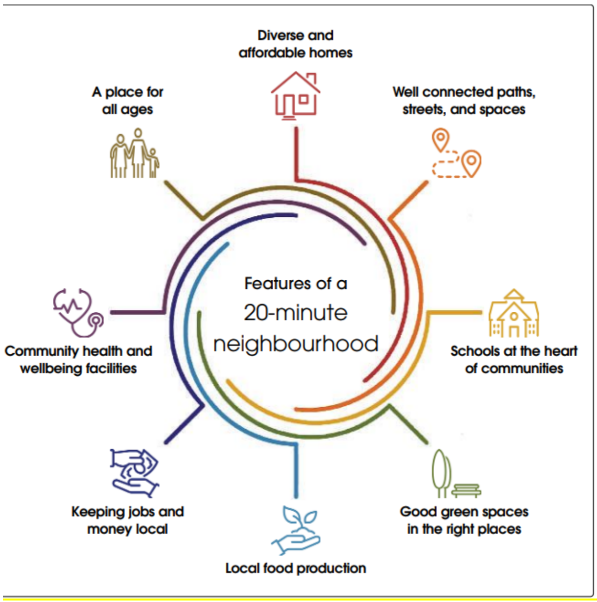
15-MINUTE CITY NEIGHBOURHOODS

What is a 15-minute city?

117. The concept of a 15-minute city originated with Professor Carlos Moreno, Sorbonne University. He set out a 15-minute city framework with four key characteristics:
   a. **Proximity** – things must be close
   b. **Diversity** – land uses must be mixed to provide a wide variety of urban amenities nearby
   c. **Density** – there must be enough people to support a diversity of businesses in a compact land area – this does not need to be high-rise; low-rise density can be sufficient
   d. **Ubiquity** – these neighbourhoods must be so common that they are available and affordable to anyone who wants to live in one.[37]

118. The concept, sometimes also called 20-minute neighbourhoods, has grown in popularity, for the following reasons:

Societies around the world are facing a number of urgent, interconnected problems, including how to reduce carbon emissions; how to help people become more active to improve health and wellbeing; how to reduce loneliness; and how to improve high streets and neighbourhoods that have declined. These questions, shared by disparate places, are leading to similar answers.. places that include most of the things that most people need for their everyday lives within a short and pleasant walk or cycle ride.'[38]



[37] Extract from Introducing the 15-Minute City Project — 15-Minute City (15minutecity.com) accessed 21/10/22
[38] 20-Minute Neighbourhoods – Town and Country Planning Association March 2021 – downloaded 21 October 2022 20MN_Main.qxd (tcpa.org.uk)

119. The 15-minute city/ 20-minute neighbourhood therefore reimagines urban spaces, promoting the idea of mixed-use, community-based, environmentally-friendly infrastructure and development. It applies to districts within cities, with each district having everything a person might need to work, rest and play, which can be accessed without the use of a car.

Source: Victoria State Government[18] [39]

120. TCPA[40] highlight that, whilst every community has its own context and aspirations for the future and any plans to create a 20-minute neighbourhood should be based on what the local community wants, the following characteristics, or 'ingredients', are likely to be part of the mix:

■ diverse and affordable homes

■ well connected paths, streets and spaces

■ schools at the heart of communities

■ good green spaces in the right place

■ local food production

■ keeping jobs and money local

■ community health and wellbeing facilities, and

■ a place for all ages.

[39] How to build back better with a 15-minute city (c40knowledgehub.org) – downloaded 21 Oct 2022
[40] As above

121. Roisin Willmott, Director, RTPI Cymru explained that the benefits of a 15-minute city include:
   a. making it easier for people to walk and cycle, if able to, which helps their health and is cheaper
   b. reducing congestion by improving walking, cycling and public transport
   c. improving local economy by increasing service provision
   d. improving local economy by boosting footfall and reducing congestion
   e. tackling climate and biodiversity crises
   f. having housing in the right places to enable people to stay in their communities
   g. addressing poverty by removing car dependency, ensuring public and active transport routes are available, and making access to services and facilities easier

Issues/ concerns re 15-minute city

122. Centre for Cities highlight the following issues to consider re the 15-minute concept:
   a. 15-minute neighbourhoods do not offer the same breadth of jobs that a successful city centre can offer
   b. Some office-based businesses locate in city centres because of the benefits this location brings –
      i. face to face collaboration with colleagues, clients, collaborators and competitors
      ii. widest choice of potential employees to attempt to recruit
   c. More than half of jobs cannot be done from home e.g., manufacturing
   d. Whilst hybrid working is likely to continue, people will travel outside their neighbourhood a number of times a week
   e. Amenities that rely on a large customer base to turn a profit cannot locate within individual neighbourhoods and tend to cluster in city centres e.g., theatres, Michelin starred restaurants, football stadia etc.
   f. Amenities that serve local markets, such as restaurants, takeaways, pubs and doctors' surgeries are able to be located in 15-minute neighbourhoods
   g. 15-minute neighbourhoods require high density development, which may require some local authorities to alter their land use planning.[41]

[41] Will Covid-19 make the idea of the 15 minute city a reality? | Centre for Cities – downloaded 23 November 2022

123. Cllr Goodway, Cabinet Member – Investment and Development highlighted the need to be realistic about what can be provided within a 15-minute neighbourhood and what the impacts of 15-minute neighbourhoods could be, citing the following:

    a. need to be careful about the messages put out about what the Council and partners, such as the Health Board, are able to provide e.g., it may not be realistic to say that everyone will be able to access a GP surgery within 15-minutes.
    b. need to be careful not to create barriers to people moving beyond their 15-minute neighbourhood.
    c. the shift to more people working from home means that there is less usage of public transport, meaning it is not viable, resulting in policy choices of either a massive public subsidy in public transport or a push for people not to work from home
    d. as people shop locally/ online more, this could reduce the viability of the city centre.

124. Cllr Goodway added that he shared the agenda of 15-minute neighbourhoods with his Cabinet colleagues but that there may be different views re the levels of concerns.

Examples of 15-minute cities

125. Examples where this approach, or aspects of it, is being used around the world include:
    a. England – London, Ipswich, Birmingham
    b. Scotland
    c. Europe – Paris, Brussels, Valencia, Barcelona – 'super-blocks', Milan – tactical urbanism (claiming space for walking and cycling), Oslo and Lisbon - new working spaces (co-working) embedded in planning policy[42]
    d. USA - Houston, New York, Portland
    e. Australia – Melbourne, Sydney – 20-minute neighbourhoods
    f. Bogota – Barrios Vitales
    g. Chengdu, China

126. The C40 Cities – a global network of large cities committed to addressing climate change, including London – embraced the approach in 2020 as part of its '*Agenda for a Green and Just Recovery*'.

[42] Summarised from Full article: The 15-minute city concept and new working spaces: a planning perspective from Oslo and Lisbon (tandfonline.com) accessed 21 October 2022

Scottish Government

127. The Scottish Government has included the 20-minute neighbourhood as a priority in their new National Planning Framework. Living Streets Scotland is working on a Scottish Government funded project in North Lanarkshire, Stirling and Dunblane to develop plans for how specific neighbourhoods could move towards becoming 20-minute neighbourhoods. Living Streets are looking at what people want, why they do and don't do certain activities locally, and what would need to change. One of the first things they are doing is finding out how people in these areas currently feel about their neighbourhood:

'If you live in Airdrie, Stirling or Dunblane, we'd love it if you could fill in this survey. The questions are based on the Place Standard, so we can easily compare our work with other people's work on neighbourhoods. It should take you about ten minutes to complete. Thank you!

TAKE OUR SURVEY
LIVING STREETS SCOTLAND DIRECTOR, STUART HAY, DISCUSSES 20-MINUTE NEIGHBOURHOODS AT SCOTLAND'S CLIMATE ASSEMBLY (WATCH HERE)' [43]

Edinburgh

128. Edinburgh is progressing plans for 20-minute neighbourhoods across the city. They have laid out a City Mobility Plan[44], which aims to move away from car dependency, with improved active travel connections. They are also working on plans to revitalise local centres and high streets. They are stressing the need to consult local communities:

'Each neighbourhood in the city is different, with its own unique set of requirements. That's why it's so important that local communities participate in this process to help us understand everyone's needs and make sure their views shape the neighbourhood approach.'[45]

129. Residents in west Edinburgh have been asked to explain what they currently think about the area and to share their ideas, with the consultation to run alongside planned road improvement projects in the town centre.[46]

Ipswich

130. Ipswich Central is a Community Improvement District company. It has developed Ipswich Vision, which is a partnership of civic, business and education leaders working

[43] 20-minute neighbourhoods | Living Streets
[44] City Mobility Plan – The City of Edinburgh Council
[45] Edinburgh progresses with plans for 20-minute neighbourhoods across city (newstartmag.co.uk)
[46] As above

together to deliver transformative projects in Ipswich Central, including the '*Connected Town'* project.

131. In Spring 2021, Ipswich Central underwent a significant public and business consultation to help shape the *Connected Town* strategy to the needs of the community. A suite of reports shows the results of the consultation is available at:

Connected Town | IpswichCentral

132. Ipswich's *Connected Town* project aims to create a place that connects business, culture, sports, faith, arts, education, health and community within a 15-minute triangle. The ambition is for the Connected Town area to better unite businesses, organisations and residents; to create a thriving and engaging town centre in which people and communities can thrive. *2022-2027 Plan*.

133. The *2022-2027 Plan* highlights Ipswich has been successful in a £25m bid for Town Deal funding for regenerating the town centre. Plans include:
    a. Town Centre Management
    b. Digital Ipswich (free public Wi-Fi and digital gift card and loyalty scheme)
    c. Waterfront regeneration
    d. Events and Promotions, including Christmas Tree & Ipswich letters
    e. Indie Ipswich, Oasis Green Trail & Town Trails
    f. DMO – destination management & branding.

Welsh Government

134. Welsh Government does not have a specific reference to 15-minute city or 20-minute neighbourhoods in its programmes/ strategies/ policies but the overarching 'Programme for Government', which was refreshed in December 2021, includes relevant strands:
    a. Seek a 30% target for working remotely
    b. Deliver the Digital Strategy for Wales and upgrade out digital and communications infrastructure
    c. Expand arrangements to create or significantly enhance green spaces
    d. Develop new remote working hubs in communities
    e. Invest in travel options that encourage public transports and support walking and cycling
    f. Develop masterplans for towns and high streets

g. Empower communities to have a greater stake in local regeneration
h. Repurpose public space for outdoor events, markets, street vendors, pop up parks and parklets.[47]

135. Also, as the Royal Town Planning Institute Cymru (RTPI Cymru) point out:

'*The principles and features of the 15-minute neighbourhood model resonate well with the provisions set out in the Well-being of Future Generations (Wales) Act 20152 and the rural policy framework set out in Future Wales: The National Plan 20403 and Planning Policy Wales, along with Well-being Indicators, the National Sustainable Placemaking Outcomes and Placemaking Charter Principles. The model itself is a useful tool in re-enforcing a local focus in planning policy and decision making.*'[48]

136. In addition, the RTPI Cymru report[49] references the following as supportive of 15-minute neighbourhoods: Active Travel (Wales) Act 2013, Environment (Wales) Act 2016, and Planning (Wales) Act 2015.

The role of local authorities in 15-minute cities

137. There is no one guide or toolkit for local authorities when implementing the 15-minute concept. Having reviewed how several local authorities have approached this, TCPA[50] highlight the following 10 principles:

'*Although the idea of complete, compact and connected places is simple, putting it into practice is complex. The following 10 principles are based on shared lessons from places with several years' experience*:

- a compelling vision, well communicated
- strong, inspiring leadership
- empowered communities
- research, data, and analysis
- partnership and advocacy
- addressing inequalities
- adopting policy
- investment

[47] Welsh Government - Programme for Government - Update
[48] Plan The World We Need (rtpi.org.uk)
[49] As above
[50] 20-Minute Neighbourhoods – Town and Country Planning Association March 2021 – downloaded 21 October 2022 20MN_Main.qxd (tcpa.org.uk)

- ‘hard’ and ‘soft’ measures, and
- evaluation and adaptation.’

138. Some of these factors were raised by other witnesses to this Inquiry, as set out below.

Leadership, Vision and Resources

139. Roisin Willmott, Director of RTPI Cymru told this Inquiry that politicians and senior officers need to provide leadership and ensure a vision, with place-based policies and resource allocation aligned to delivering a 15-minute city. She added that it is very important to have sufficient planning resources to undertake the detailed mapping and planning and engagement required to successful implement a 15-minute city approach.

140. TCPA[51] highlight that whilst council planners have an important role to play, they are likely to be successful only if schemes have high-level political support.

Empowering Communities/ Community Engagement

141. TCPA[52] stress that resident and business engagement at an early stage has been key to other local authorities successfully implementing 20-minute neighbourhoods, enabling an understanding of what the local community wants and building this into action plans. Two of the examples cited earlier in this report – Scotland and Ipswich – both have consultation with local communities at their centre and as their initial starting place.

142. Roisin Willmott, Director RTPI Cymru, told this Inquiry that community engagement is key to 15-minute city implementation, showing local communities that there are answers to the challenges facing them and moving beyond consultation to participatory engagement and involvement. She stressed the importance of trying new ways to engage, to ensure the voices of different people and different communities are heard so that plans are truly reflective of communities e.g., it is very important to use different mechanisms to engage young people in discussions about 15-minute city and associated actions, as young people are less likely to use Cardiff Council's existing consultation mechanisms.

[51] 20-Minute Neighbourhoods – Town and Country Planning Association March 2021 – downloaded 21 October 2022 20MN_Main.qxd (tcpa.org.uk)
[52] As above

143. The RTPI Cymru report[53] recommends:

'Resource, training and support for local planning tools such as community led Place Plans, community engagement etc. Resources within communities, town and community councils and local planning authorities, would assist in improving understanding and provide the capability and capacity to support joined up working.'

144. This Inquiry asked for examples of suitable community engagement approaches and Roisin Willmott, Director RTPI Cymru, provided the following:

Examples of suitable community engagement approaches

- Welsh Government Education Learning Hub – contains advice on how to involve children and young people in planning https://hwb.gov.wales/repository/resource/7fd63088-bf14-444b-8cfa-e8453dd661b6 https://hwb.gov.wales/repository/resource/dc719db0-de38-4516-8122-d9d9d69441c6

- Planning Aid for Scotland - SP=EED toolkit for community engagement

- Place Plans – used by Conwy and Monmouthshire – helpful in places where community and town councils but can also be done with ward councillors. However, it is easier to achieve cohesive engagement and vision in smaller towns

- Planning Aid Wales - useful contact to discuss community engagement as they lead on this in Wales. https://planningaidwales.org.uk/ourservices/place-plan-support/

Research, data and analytics

145. The TCPA[54] highlight that successful implementation of 15-minute city principles varies according to place but is underpinned across all places by a thorough understanding of usage patterns and residents' needs. This then enables the identification and modelling of potential interventions, such as walking routes, cycle routes, crossings, facilities and amenities:

a. Urban retrofitting
   - spatial analysis that maps streets, paths and public spaces, usage patterns, location of services and facilities
   - Identify and model potential interventions to understand likely impacts.

[53] Plan The World We Need (rtpi.org.uk)
[54] 20-Minute Neighbourhoods – Town and Country Planning Association March 2021 – downloaded 21 October 2022 20MN_Main.qxd (tcpa.org.uk)

b. Post-War development retrofitting
    - Comprehensive data gathering to understand usage patterns
    - Qualitative research with residents to understand their needs
    - Model proposed interventions to understand likely impacts

c. Urban Extensions and New Settlements
    - Take a holistic view – improve connectivity and add facilities that benefit existing and new community.

146. Roisin Willmott, Director RTPI Cymru, added that taking a spatial approach means it is possible to identify solutions that deliver the required vision.

Adopting Policy – Planning and Transport

147. The RTPI Cymru report '*Living Locally in Wales*'[55] details the role of the planning system in supporting living locally by promoting and shaping place quality, value and sustainability:

a. Working collaboratively to achieve meaningful impact
b. Supporting community engagement and participation e.g., place plans, shape my town etc.
c. Monitoring achievement of desired outcomes
d. Section 106 – proactive use of Travel Plans etc.

148. Roisin Willmott, Director RTPI Cymru, explained that it is really important to ensure 15-minute city principles are enshrined in the Local Development Plan, as it sets the framework for planning decisions; Supplementary Planning Guidance can then be used to expand on how the Council favours developments that meet 15-minute city principles. She added that the Strategic Development Plans, yet to be developed, will be really important as they provide a regional approach to planning, and this is very important for areas such as Cardiff, given the complex interdependencies and movement between local authority areas in the region. However, she stressed:

> *'Planners are well-placed to bring together the various strands, but it requires political and senior officer leadership to ensure work is implemented to change residents' behaviours – planners cannot do this on their own.'*

[55] Plan The World We Need (rtpi.org.uk)

Monitoring and Evaluation

149. Roisin Willmott, Director RTPI Cymru, explained that outcome focused planning would be a useful tool to monitor successes in new provision, and whether local authorities are building better places. The indicators would show what has changed for the better e.g., better education provision, better health, better housing, better air quality etc. She added that the RTPI has a toolkit to measure planning outcomes: RTPI | Measuring What Matters: Planning Outcomes Toolkit

150. The RTPI Cymru report 'Living Locally in Wales'[56] also recommends that '*planners, other partners, agencies and sectors align strategic goals, investment priorities and outcomes and indicators collaboratively, to facilitate meaningful impact'.*

Is Cardiff a 15-minute city?

151. This Inquiry wanted to understand residents' views on whether their local neighbourhoods meet their needs within a 15-minute walk/ cycle radius and whether they are able to access this provision. The Inquiry therefore paid for questions to be included in the Ask Cardiff survey; full details are available at Appendix 7.

152. The Ask Cardiff survey responses show:
    a. 50% of respondents feel that their local neighbourhood has the necessary services and amenities to meet their needs
    b. A high level of respondents' state essential services – food, pharmacy, schools, doctors, food and drink venues, post office, banking facility and parks and play areas – are available within 15 minutes' walk or cycle (between 73% - 91% depending on the service/ amenity)
    c. In terms of accessing local services and amenities
        - 60% of respondents state frequent and reliable public transport is available
        - 48% of respondents state safe walking routes are available
        - 26% of respondents state safe cycling routes are available
    d. 30% of respondents state there are no barriers to accessing local services and amenities

[56] Plan The World We Need (rtpi.org.uk)

e. 24% of respondents state poor parking facilities are a barrier to accessing local services and amenities
f. 23% highlighted some services are not available in their local neighbourhood
g. 19% highlighted they did not feel safe in their local neighbourhood.

153. In response to a question about what services and amenities are required in their local neighbourhood to meet their needs, the following were highlighted – full responses are available in Appendix 7:

Category	No. of times mentioned
Improved Facilities/ Amenities	59
Public Transport	46
Waste / Rubbish Services	24
Street Cleansing	14
Highways	13
Parks	12
ASB/ Crime/ Police	12
Parking	11
Footpaths/ Pavements	10
Other	7

154. When asked to say what else stops them accessing services in their local neighbourhood, the following responses were received – full responses are available in Appendix 7:

Category/ sub-category	No. of times mentioned
Public Transport	39
Pavements	17
Highways	9
Health Services	8
Cycle Lanes/ Facilities	7
Lack of Facilities	7
Timing of Local Services	6
Lack of Car Parking	6
ASB/ Crime/ Police	5
Disability	4

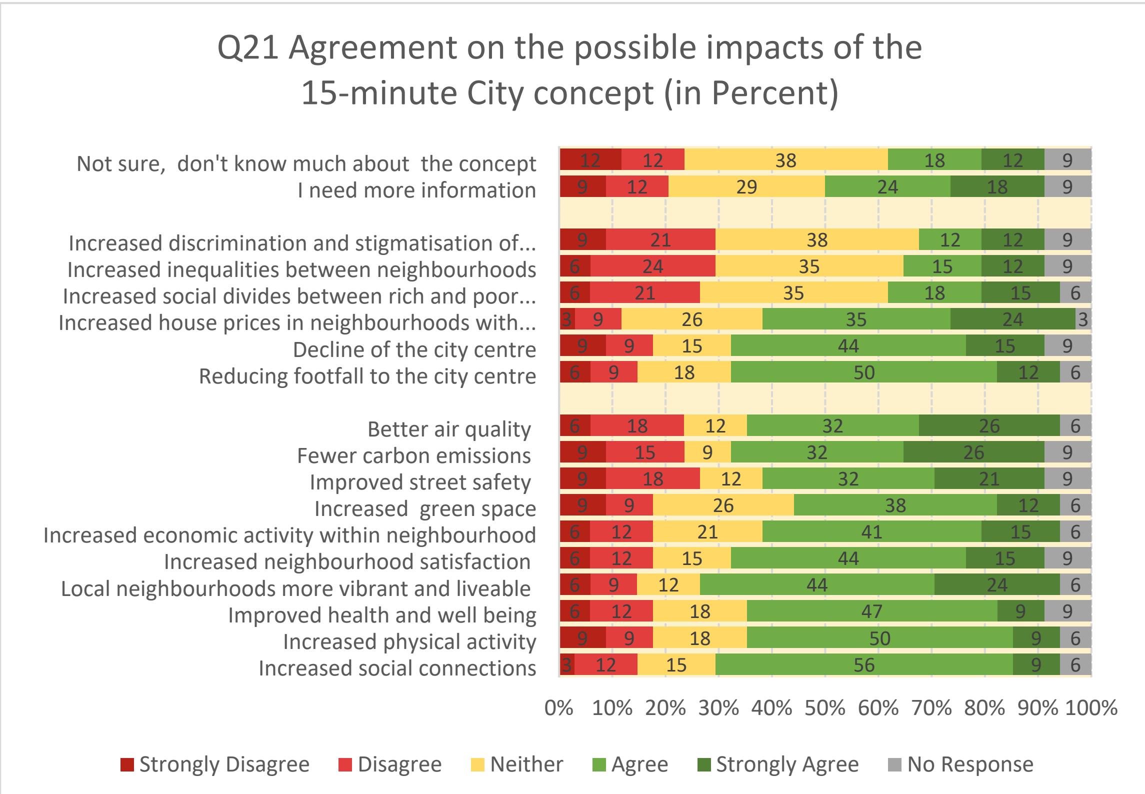
155. The Inquiry was also interested in residents' views on whether **shared workspaces** are needed in their local neighbourhoods; 41% of respondents stated they did not know and 41% of respondents stated no shared workspaces are needed. This mirrors the findings

of this Inquiry's own research[57], where 56% of respondents stated they were not aware of the remote or co-working provision available within 15 minutes' walk or cycle from their home.

Possible Impact of implementing 15-minute city concept in Cardiff

156. The Inquiry was keen to understand views on the possible impacts of the 15-minute city concept being applied in Cardiff. Whilst responses to this Inquiry's own research[58] were very low, they provide an interesting insight. In particular:

a. 39% confirm they need more information to fully understand the implications
b. 53% - 68% express agreement to the more positive impacts, such as improving air quality, reducing carbon emissions, improving the liveability of local neighbourhoods and improving street safety
c. 59% believe it could lead to increased house prices in areas with more facilities
d. 33% believe it could increase social divides between rich and poor
e. 24% believe it could lead to increased discrimination and stigmatisation of poorer communities
f. 27% believe it could increase inequalities.



57 Available at Appendix 6
58 Available at Appendix 6

157. This Inquiry's own research[59] asked specific questions on how the **city centre** could be transformed as part of the 15-minute city concept, and found:
    a. 53% agree that the city centre could increase its role in:
        - Recreation
        - provision of green and communal space
        - tourism and visitors
        - access to culture and arts
    b. 47% agree that the city centre will continue to 'provide night-time economy', eating and drinking establishments, as well as shopping and retail
    c. 38% agree that the city centre could increase its role in highlighting its history.

158. This Inquiry's own research[60] also asked specific questions on how **local and district centres** could be transformed as part of the 15-minute city concept, and found:
    a. 65% agree it could lead to increased footfall in local shops and businesses
    b. 62% agree it could lead to increased amenities and facilities
    c. 44% agree it could lead to increased provision of remote and co-working facilities.

159. Around half of respondents agree that the transformation of the local and district centres would increase the need for disabled parking (50%) and parking space for non-motorised vehicles (47%). The majority of respondents were in agreement that the provision for frequent and reliable public transportation (77%), safe walking routes (71%) and safe cycling routes (53%) are needed.

Implementing 15-minute city concept in Cardiff

160. This Inquiry noted that the Council's Corporate Plan contains the following re 15-minute City:
    a. Establish a '15-minute city toolkit' to accelerate district centre regeneration, including housing- and transport-led improvements
    b. New Regeneration Strategy to support 15-minute principles
    c. Support the vitality and viability of district and local centres and deliver the'15-minute city' approach to all major centres by 2027.

[59] Available at Appendix 6
[60] Available at Appendix 6

161. This Inquiry therefore sought witnesses' views on what Cardiff Council needs to do to successfully implement the 15-minute concept in Cardiff.

Leadership, Vision and Resources

162. This Inquiry heard from Gareth Jones, CEO - Town Square that it is important the Council is clear on what it wants to achieve from its commitment to a 15-minute city, and its economic objectives and mission.

163. Roisin Willmott, Director RTPI Cymru, explained it is important to recognise the role Cardiff plays as capital city and regional centre: it hosts the Senedd, cultural venues and events, large employers etc. and so the 15-minute model for Cardiff needs to recognise the need to continue to do this and balance this with need to ensure access to local services.

164. Adrian Field, Executive Director - FOR Cardiff, stated that care needs to be taken not to misconstrue the 15-minute city concept, highlighting that the need for a city centre hub is not negated by this concept and that local hubs are also needed. In his view, Cardiff has the balance right. Likewise, Jon Day, Operational Manager – Tourism and Investment, highlighted supporting the city centre and working to improve district and local centres need not be mutually exclusive; there is space for both in Cardiff, with district and local centres having their own, separate hierarchy compared to the city centre.

165. Roisin Willmott, Director RTPI Cymru, added that different approaches will be needed for the different areas of Cardiff – it is not a 'one size fits all' approach.

166. Councillor Lloyd Jones highlighted the need to cherish and nourish Cardiff's countryside communities and enable people to live in a reasonable manner and not be isolated but be able to access services, such as GPs, by public transport. She highlighted this particularly applied to communities west of the river Taff, which forms a natural barrier.

167. With regards to resources, Jon Day, Operational Manager – Tourism and Investment, informed the Inquiry that Directorates are working together looking at what can be done with the tools and levers available and the resources available, including Welsh

Government's Transforming Towns programme, and UK Government's Shared Prosperity Fund.

Empowering Communities/ Community Engagement

168. Roisin Willmott, Director RTPI Cymru, stressed the importance of reaching out in different ways, to reach different audiences in different parts of the city. She highlighted that it is important to have different approaches to engage young people, older people, and all populations across the city, so that the Council understands the different pressures across Cardiff and how the 15-minute city approach needs to be tailored to meet these.

169. Roisin Willmott, Director RTPI Cymru, added that the Council could undertake community engagement to seek views on the replacement LDP vision and the detail for specific areas, to develop place plans. Whilst these place plans would not be part of the statutory LDP, they could be adopted as SPG, as long as they link back to policies in the replacement LDP. However, Roisin highlighted that this process is resource-intensive.

170. In addition, Roisin Willmott, Director RTPI Cymru, highlighted the need to integrate with neighbouring local authorities – it would not be possible to deliver a 15-minute city model in Cardiff without integration with neighbouring local authorities due to transport interconnectedness, and provision of regional services in Cardiff e.g., health services.

171. Cllr Goodway, Cabinet Member – Investment and Development, explained that he thought there should be a process of education for Cardiff residents, explaining what a 15-minute city means, what the Council is trying to achieve, and what safeguards are in place to manage unintended consequences.

Research, data and analytics

172. Rebecca Hooper, Operational Manager – Neighbourhood Regeneration highlighted that the Council has already commenced some mapping work for Cardiff, overlaying hubs, libraries, leisure centres, GP surgeries etc. with key transport schemes etc. to identify gaps in safe, walkable access to facilities. She explained there were areas to improve – such as access to schools - and that they would work to embed the 15-minute neighbourhood principles across the Council.

173. In terms of understanding usage patterns, Rebecca Hooper, Operational Manager Neighbourhood Regeneration, highlighted currently there is no effective measure of footfall in the district and local centres – her team rely on anecdotal evidence. She clarified that equipment to record district and local centre footfall is available but there is a cost for this.

174. Andrew Gregory, Director of Planning, Transport and Environment, told the Inquiry that the Council is trying to be more systematic about how it gathers and uses data and that it is recognised they need more metrics for district and local centres. He added that having better metrics would help the Council to better guide future use of district and local centres and help to have successful centres. Jon Day, Operational Manager Tourism and Investment also told the Inquiry that work needs to be done to look at ways to measure footfall.

Planning - Policy and Implementation

175. Andrew Gregory, Director of Planning, Transport and Environment stated that officers across Economic Development, Housing & Communities, and Planning, Transport & Environment Directorates are working together to develop a 15-minute neighbourhood toolkit. Rebecca Hooper, Operational Manager – Neighbourhood Regeneration added that the toolkit will help to embed the 15-minute neighbourhood principles across all work.

176. Rebecca Hooper, Operational Manager – Neighbourhood Regeneration, explained the Council's new Regeneration Strategy will be informed by the Administration's '*Stronger, Fairer, Greener'* policy statement, and by the City Centre Recovery Action Plan – to ensure it fits with this – and that it will set the agenda for improvements to District and Local Centres and will embed 15-minute neighbourhood principles.

177. Jon Day, Operational Manager – Tourism and Investment, added that the regeneration strategy and 15-minute toolkit will help establish where monies should be directed. He highlighted that the number one issues raised by the public is the need for better public and active transport.

178. Members sought to understand whether existing strategies, such as the Economic Development Strategy that zones the city, will be reviewed and amended to include 15-minute neighbourhood principles. Cllr Goodway responded that the Economic Development Strategy would not be amended. Cllr Goodway highlighted there is a need for a balanced approach across the city and a need to manage expectations.

179. Roisin Willmott, Director RTPI Cymru, stressed that it is important 15-minute principles are enshrined in Cardiff's Local Development Plan as this sets the strategy for how places are developed and managed in Cardiff e.g., housing, employment and transport systems.

180. Andrew Gregory, Director of Planning, Transport and Environment, told the Inquiry that the published replacement Local Development Plan (RLDP) Vision and Objectives focuses on well-being and quality, on joining up 15-minute nodes, setting out the aspiration for Cardiff to be a 15-minute city. He continued that:
'..the whole agenda of 15-minute neighbourhoods is central to the RLDP and is one of the key planks informing the RLDP, alongside One Planet Cardiff, City Centre Recovery Action Plan, Transport Strategy, and the Economic Development Strategy.'

181. Andrew Gregory elaborated that the RLDP will include the principles of 15-minute neighbourhoods in its policies. He explained there are a variety of ways the Council could detail its requirements re 15-minute neighbourhoods, including

    a. An SPG – the RLDP policies will provide the required hooks for an SPG – however, this may not be the right route to use as SPG focuses on guiding development and there may not be any development in areas where trying to improve neighbourhoods, for example a lot of the district centres do not have development opportunities, so an SPG would not be of much use in addressing issues in these centres.
    b. A standalone policy – in the same way that One Planet Cardiff is a standalone policy that goes across the Council and guides policy and delivery across directorates
    c. Integration in existing policies – which would require review and amendment of these policies.

182. Andrew Gregory clarified that it is a political choice whether to have a specific SPG on 15-minute neighbourhoods or whether to have a standalone policy on this or whether to weave it into wider strategies that sit alongside the RLDP.

183. Members sought clarity on what needs to go into the RLDP to secure 15-minute neighbourhoods. Councillor Wild, Cabinet Member – Climate Change responded:
    a. The evidence from this Inquiry is really helpful and this Inquiry should inform the development of the RLDP
    b. Virtually everything in the RLDP should help to secure 15-minute neighbourhoods e.g., transport - active travel, public transport
    c. Density is key
    d. RLDP focuses on sustainable development and so it supports 15-minute neighbourhoods.

184. With regard to the use of S106 funding, Councillor Wild, Cabinet Member – Climate Change stressed that s106 funding will not be able to deliver everything that a community might need – the Council has to prioritise what it seeks from s106. Andrew Gregory, Director of Planning, Transport and Environment elaborated that it is a political view what items to ask via the s106 route. Councillor Goodway, Cabinet Member – Investment and Development highlighted that lots of Cardiff does not have development and so will not have s106 monies available to improve them.

185. Roisin Willmott, Director RTPI Cymru, suggested Cardiff Council consider signing up to the Placemaking Wales Charter, which can assist with knitting together all elements. She highlighted that other local authorities in Wales have done so, e.g., Neath Port Talbot Council, as well as professional bodies such as RTPI, and housing associations and private developers. The Design Commission for Wales, which help to develop the Charter, provides support on implementing the Charter. Placemaking Charter - Design Commission for Wales (dcfw.org)

Retrofitting existing estates

186. Members sought to understand the specifics of how planning could assist with implementing 15-minute city principles, for example on existing estates lacking facilities.

Members noted that the TCPA's report[61] highlights the following actions once research and data gathering had been completed:

a. Urban retrofitting
   - Identify and model potential interventions such as new walking routes, cycle routes, crossings, or facilities such as cafes, co-working spaces etc.
   - Restore connectivity

b. Post-War development retrofitting
   - Long term strategic approach required to tackle low density, car-dependent design – develop clear, compelling vision

187. Roisin Willmott, Director RTPI Cymru, elaborated that it is difficult to address lack of facilities in established estates where the Council does not own land. She clarified that it would require engagement with the local community to understand what they need and what they could provide themselves, and what requires council support. For the latter, this would require holistic thinking from the Council, rather than silo working, so that if new housing were being developed alongside the estate or if housing were being regenerated within the estate, the Council would approach this with the community's identified needs in mind and integrate as much as possible into the proposed housing.

New Estates

188. Members sought to understand the specifics of how planning could assist with implementing 15-minute city principles on new build estates. Members noted that the TCPA's report[62] highlights the following actions once research and data gathering had been completed:

a. Urban Extensions and New Settlements
   - Take a holistic view – improve connectivity and add facilities that benefit existing and new community
   - Avoid 'bolt-on' estates
   - Avoid car dependency – focus on transit-oriented developments.

[61] 20-Minute Neighbourhoods – Town and Country Planning Association March 2021 – downloaded 21 October 2022 [20MN_Main.qxd (tcpa.org.uk)]
[62] As above

189. Roisin Willmott, Director RTPI Cymru, highlighted that the Cranbrook estate in Devon does this[63]. She elaborated that the key is to get infrastructure up-front – for example, community buildings, roads, public transport etc., so that residents' habits are shaped from first occupation – if someone moves in and has to buy a car as public transport/ active travel routes are not in place, then they are unlikely to stop using the car once these facilities are put in place. With regards to roads, Roisin explained these are often finished last to avoid them being damaged by construction traffic but that they could be provided and then finished prior to occupation – it is a matter of timing.

Density

190. Members sought to understand the role of density in 15-minute cities, noting that Professor Carlos Moreno, had stated there must be enough people to support a diversity of businesses in a compact land area but that this does not need to be high-rise; low-rise density can be sufficient.

191. Roisin Willmott, Director RTPI Cymru, explained that if there is very low building density with sprawling suburbs, this makes a 15-minute city more difficult due to scale of development; the denser the development, the easier it is, partly because of economics (selling more units, so more monies to use for community facilities/ infrastructure). Therefore, the Council needs to ensure developers are given clear upfront guidance on the expectations for developments to address issues in later viability discussions.

192. Gareth Jones, CEO - Town Square, highlighted that co-working can fit with 15-minute city principles. However, it is important to realise that larger co-working models require population density, so co-working spaces need to be located where there is sufficient population within a 15-minute cycle/ walk.

193. Councillor Wild, Cabinet Member – Climate Change, highlighted that increasing density, for example by having more housing, increases footfall and this in turn helps improve the viability of district and local centres and the city centre.

[63] Cranbrook, Devon - Wikipedia At the start of the development, UK Government had a fund which would provide the investment budget for upfront infrastructure e.g., school and railway station and the developer would repay once houses were occupied (and there was a cash flow). However, it looks as though the development has not provided the retail services promised. On the latter note the Vale of Glamorgan Council has used its enforcement powers to ensure retail is provided on the Barry Waterfront sites.

Viability

194. In terms of viability, this Inquiry heard that Julie James MS, Minister for Climate Change, has highlighted that the current development process focuses on '*viability of development*' rather than '*viability of place'* and that this needs addressing to meet the Well Being of Future Generations Act requirements.

195. Roisin Willmott, Director RTPI Cymru, elaborated that it is key Cardiff Council does the following re viability:
   a. Be very clear about what is needed in Cardiff
   b. Be very clear with developers what Cardiff Council expects and what is required – be upfront about it
   c. Ensure that there are appropriate planning policies
   d. Ensure that planning officers receive back-up in negotiations
   e. Be realistic – focus on what is really needed at that site.

Public Transport

196. The results from the Ask Cardiff survey and this Inquiry's own survey highlight the need to improve public transport in Cardiff. In addition, Creative Cardiff/ Creative Economy Unit highlighted the need for improved public transport provision specifically later in the evening/ night, explaining that this would help to address social disparity both within Cardiff and within the region:
   a. Creatives often work later hours and the lack of public transport in the evenings makes it difficult for them to travel home safely.
   b. The lack of public transport in the evenings means that people in the region are not able to benefit from the cultural offer of Cardiff as either a consumer or an employee. This is a problem economically and socially – it limits cultural programming and also prevents people who live outside the immediate city (e.g., within a short taxi journey) from working in the city.
   c. The lack of late-night transport availability also has an economic impact, cutting the potential trading hours for businesses and also reducing the potential pool of industry employees.

Active Travel Routes

197. This Inquiry is clear that active travel is a fundamental component of 15-minute cities, enabling safe routes to local amenities and facilities. The results from the Ask Cardiff survey and this Inquiry's own survey highlight the need to further improve active travel routes, particularly safe walking routes.

198. Roisin Willmott, Director RTPI Cymru, explained that the current Welsh Government 21st Century Schools guidance lacks an active travel aspect but that this is a critical part of ensuring the connectivity of the school. Therefore, Cardiff Council needs to consider whether there are active travel routes that enable pupils, teachers, and staff to access the school by active travel and/or public transport.

199. FSB Cymru highlighted that their members support the need for decarbonisation but have concerns that a focus on active travel will affect businesses that require a vehicle to carry their business tools/ supplies, for example, plumbers, and businesses that travel across Cardiff, for example carers. They therefore called on Cardiff Council to:

   a. work with all tiers of government – UK and Welsh – to provide advice and support to businesses to show them how some of them could utilise active travel, whilst at the same time ensuring those businesses that do require a vehicle are supported to use an electric vehicle by installing infrastructure and providing advice and guidance and lobbying for incentives for electric vehicles for businesses.

   b. Provide clarity of whether there is going to be a congestion charge and how this will take into account businesses' needs to travel across Cardiff.

Provision of Childcare

200. Gareth Jones, CEO -Town Square, highlighted the need to think about the provision of childcare as part of the 15-minute city implementation, to ensure working parents, particularly mothers, are supported, stating:

   '*we need to encourage entrepreneurship and make Cardiff more entrepreneurial so need to think about wraparound childcare'*

Provision of co-working spaces

201. Gareth Jones, CEO - Town Square, highlighted the need to map 15-minute walk/cycle communities and overlay this with coworking provision to identify the gaps in Cardiff's provision. It would then be important to ask why those areas lacked provision. He highlighted that the Council could use development to assist in building 15-minute communities by looking to include coworking space in new communities, not just housing, for example the Llandaf BBC site, and/ or innovation space, for example near the Heath Hospital's Medi-Centre.

Monitoring and Evaluation

202. Andrew Gregory, Director of Planning, Transport and Environment, told the Inquiry that outcomes would be focused on via other strategies rather than the LDP.

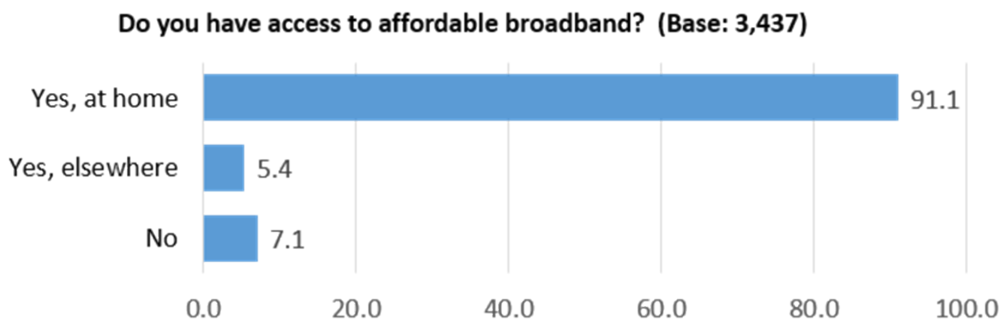
203. Rebecca Hooper, Operational Manager Neighbourhood Regeneration, explained currently her team undertake surveys prior to starting a project to gather residents' views on safety, access to facilities, provision of facilities etc. and then they repeat the survey after the work so that they can see whether the project has addressed the main issues. They also look at vacancy rates, ASB data etc.

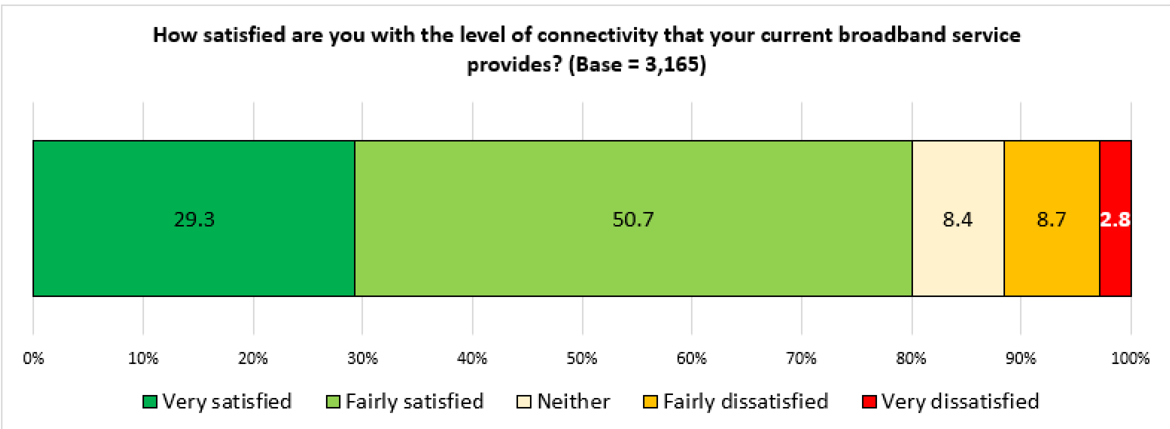
BROADBAND

Broadband Provision in Cardiff

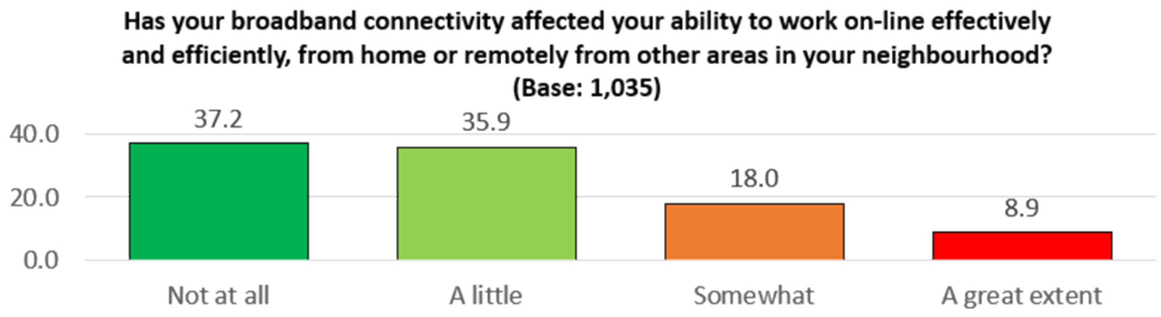
204. This Inquiry paid to include questions in the recent Ask Cardiff survey[64] to find out respondents' access to affordable broadband and whether or not they were satisfied with their level of connectivity.

205. The findings show the vast majority of respondents have access to affordable broadband (91% at home and 5% elsewhere) and are fairly or very satisfied with their level of connectivity (80% overall). However, 63% say that broadband connectivity has affected their ability to work on-line effectively, with 18% saying it has affected them somewhat and 9% affected them to a great extent.





64 See Appendix 7



206. In addition, the bespoke survey undertaken for this Inquiry, available at Appendix 6, found 54% of respondents indicated that their broadband connectivity has to some extent affected their business operations or their ability to work remotely. Of those affected:

a. 82% stated this had limited their ability to work remotely
b. 63% stated this has affected their reach of customers
c. 60% stated this had affected their access to information and/or software to support business processes
d. 57% stated this had affected their ability to market goods and services provided.

207. Most witnesses to this Inquiry felt that Cardiff is well served by broadband and highlighted that 5G presents opportunities, albeit that it is not as secure as enterprise broadband. However, Creative Cardiff/ Creative Economy Unit emphasised the need for very strong connectivity in Cardiff to enable the screen sector to remain competitive at a global level, highlighting that this is an area with potential for the highest job growth and the need to future-proof it by ensuring the right infrastructure is in place to attract investment and create a growth-ready climate. They stated:

We would therefore urge Cardiff Council to explore opportunities for embedded 5G broadband as a priority. Whilst recognising the financial burden of such investment as a time of increasing budget pressures, not responding to this need will materially negatively impact the ability of the city's creative businesses to 'bounce-forward' and drive future jobs, growth and resilience as we recover from the pandemic. We would also recommend the exploration of possible corporate partnerships to realise these ambitions at a time of budget cuts.'

Local Broadband Project

208. The Council has been successful in a £7.7m bid for funding to help address areas receiving poor broadband services across the city. Work by Welsh Government has identified there are circa 20,000 properties in Cardiff that are not included in commercial plans for FTTP Gigabit roll -out.

209. The Local Broadband Project will use the Welsh Index of Multiple Deprivation (WIMD) to prioritise which premises to tackle first, followed by best value. To do this, the project will work out how best to deliver Gigabit by aligning with suppliers' programmes, exchange by exchange i.e., if suppliers are already in the area and doing work, they will 'piggy-back' on this to reduce costs. The project will focus on target sites to make other sites nearby more affordable for the market to fund. A procurement exercise is being undertaken to enable the Council to benefit from suppliers' expertise, as they are required to submit a proposed programme based on WIMD, their programme, and best value. Submissions will be scored and then the tender awarded.

210. The Council is also working to improve the broadband duct network by utilising a '*Dig Once'* approach, to see where broadband ducts can be installed prior to reinstatement, for example recent cycle lane improvements. This helps to reduce the costs of providing broadband, particularly in areas of the city where it is expensive to excavate/ reinstate, such as the city centre. Providing ducting will also help improve access for smaller suppliers, which in turn will boost competition which will help to drive prices down, making it less costly. In addition, there is a group of council officers who work with suppliers to best co-ordinate works aligned with the management of the city for example, to minimise disruption during event days.

211. The Local Broadband project runs till 2025; officers informed the Inquiry that whilst £7.7m will go a long way to tackling poorly served premises in Cardiff, it is not possible to know exactly how many premises will be included until procurement is concluded.

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Real Estate, Place Adaptation, and Innovation within an integrated Retailing system (REPAIR) End of Project Report – Retail Change and Transition in UK City Centres – 2022

RTPI – Living Locally in Wales - Plan The World We Need (rtpi.org.uk)

RTPI – response to Senedd Town Centre Regeneration Inquiry – September 2022

Senedd - Climate Change, Environment and Infrastructure Committee - Digital Connectivity – Broadband – August 2022

Town and Country Planning Association – 20-Minute Neighbourhoods 20MN_Main.qxd (tcpa.org.uk)

TandFonline – The 15-Minute city concept and new working spaces: a planning perspective from Oslo and Lisbon

Wales Online - Sub-par, unreliable broadband connections 'excluding people from modern life' in Wales - Wales Online

Welsh Government – Evaluation of the Wales Cultural Recovery Fund 2020-21 – Government Social Research – report number 44/2022 published 23/6/2022

Welsh Government – Programme for Government – December 2021

Welsh Government – Remote Working public engagement exercise: local work hubs – March 2022

Welsh Government – Smarter Working: a remote working strategy for Wales

Welsh Government – Transforming Towns Programme

What Works Centre for Local Economic Growth - Evidence Briefing: local growth, high streets and town centres – 2021

APPROACH TAKEN

M1. Members undertook this Inquiry during October 2022 – January 2023.

M2. Members received evidence from the following internal stakeholders who attended question & answer sessions and contributed to a panel discussion:

- Cllr Russell Goodway – Cabinet Member – Investment & Development
- Cllr Chris Weaver – Cabinet Member – Finance, Modernisation & Performance
- Cllr Caro Wild – Cabinet Member – Climate Change
- Phil Bear – Head of ICT
- Jon Day – Operational Manager – Tourism & Investment
- Mandy Evans – Local Broadband Fund Project Manager
- Andrew Gregory – Director of Planning, Transport & Environment
- Gladys Hingco – Principal Scrutiny Research Officer
- Rebecca Hooper – Operational Manager – Neighbourhood Regeneration

M3. Members also received evidence from the following external stakeholders:

- Rob Bassini – FSB Cymru
- Adrian Field – Executive Director - FOR Cardiff
- Peter Hall – Business Owner – Llandaff High Street
- Gareth Jones – Chief Executive – Town Square
- Phil Kaye – Business Owner - Wellfield Road
- Jess Mahoney – Creative Economy Unit/ Creative Cardiff
- Richard Sewell – Head of Digital Infrastructure – Welsh Government
- Adam Sparkes – Community Manager – Cwrt Coworking, Llanishen
- Richie Turner – Incubation Manager, Stiwdio – University of South Wales
- Roisin Willmott – Director – Wales & Northern Ireland - RTPI

M4. Scrutiny Services paid for questions relevant to this Inquiry to be included in the Council's Ask Cardiff survey, available for all residents to complete. The provisional results are shown at Appendix 7 and integrated where relevant in the report where relevant.

M5. Scrutiny Research also undertook a bespoke survey targeting remote workers, small businesses, and city centre, local and district centre traders. The report is attached at Appendix 6 and integrated in the report where relevant.

M6. To inform the Inquiry, Members were provided with briefing reports ahead of each meeting. These have been synthesised in the report.

M7. The evidence has been used to identify suitable findings from the Inquiry.

FINANCIAL IMPLICATIONS

The Scrutiny Committee is empowered to enquire, consider, review, and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct financial implications at this stage in relation to any of the work programme. However, financial implications may arise if and when the matters under review are implemented with or without any modifications.

LEGAL IMPLICATIONS

The Scrutiny Committee is empowered to enquire, consider, review, and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct legal implications. However, legal implications may arise if and when the matters under review are implemented with or without modification. Any report with recommendations for decision that goes to Cabinet / Council will set out any legal implications arising from those recommendations. All decisions taken by or on behalf of the Council must (a) be within the legal power of the Council; (b) comply with any procedural requirement imposed by law; (c) be within the powers of the body or person exercising powers on behalf of the Council; (d) be undertaken in accordance with the procedural requirements imposed by the Council e.g. standing orders and financial regulations; (e) be fully and properly informed; (f) be properly motivated; (g) be taken having regard to the Council's fiduciary duty to its taxpayers; and (h) be reasonable and proper in all the circumstances.

COMMITTEE TERMS OF REFERENCE

- To scrutinise, measure and actively promote improvement in the Council's performance in the provision of services and compliance with Council policies, aims and objectives in the area of economic regeneration.
  - Cardiff City Region City Deal
  - Inward Investment and the marketing of Cardiff
  - South East Wales Economic Forum
  - Economic Strategy & Employment
  - European Funding & Investment
  - Small to Medium Enterprise Support
  - Cardiff Harbour Authority
  - Lifelong Learning
  - Leisure Centres
  - Sports Development
  - Parks & Green Spaces
  - Libraries, Arts & Culture
  - Civic Buildings
  - Events & Tourism
  - Strategic Projects
  - Innovation &Technology Centres
  - Local Training & Enterprise

- To assess the impact of partnerships with and resources and services provided by external organisations including the Welsh Government, joint local government services, Welsh Government Sponsored Public Bodies, and quasi-departmental non-governmental bodies on the effectiveness of Council service delivery.

- To report to an appropriate Cabinet or Council meeting on its findings and to make recommendations on measures, which may enhance Council performance or service delivery in this area.

Economy & Culture Scrutiny Committee Membership

Councillor Peter Wong
(Chairperson)

Councillor Rodney Berman

Councillor Catriona Brown-Reckless

Councillor Stephen Cunnah

Councillor Jane Henshaw

Councillor Peter Huw Jenkins

Councillor Helen Lloyd Jones

Councillor Daniel Naughton

Councillor Sara Robinson

APPENDICES

Appendix 1 – Strategy and Plan Extracts

Welsh Government - Programme for Government - Update

Key aspects relevant to this Inquiry:

1. Enable town centres to become more agile economically by helping businesses to work co-operatively, increase their digital offer and support local supply chains, including local delivery services
2. Seek a 30% target for working remotely
3. Deliver the Digital Strategy for Wales and upgrade out digital and communications infrastructure
4. Support 80 re-use and repair hubs in town centres
5. Expand arrangements to create or significantly enhance green spaces
6. Introduce legislation permitting local authorities to raise a tourism levy
7. Engage with arts, culture and heritage sectors to develop a new culture strategy
8. Make 20mph the default speed limit in residential areas
9. Ban pavement parking wherever possible
10. Increase the use of equity stakes in business support
11. Support the development of a register of empty buildings and help small businesses move into vacant shops
12. Develop new remote working hubs in communities
13. Invest in travel options that encourage public transports and support walking and cycling
14. Develop masterplans for towns and high streets
15. Empower communities to have a greater stake in local regeneration
16. Create more community green space in town centres
17. Repurpose public space for outdoor events, markets, street vendors, pop up parks and parklets

Cardiff Council Strategies and Plans

a. Several of the Council's existing strategies and plans are relevant to this Inquiry, including:
    - Corporate Plan 2022-25
    - Recovery & Renewal Plan
    - City Centre Recovery Action Plan.

b. The Council is also developing further strategies and plans that are relevant:
    - Music Strategy
    - Cultural City Compact/ Cultural Strategy
    - Tourism Strategy
    - Events Strategy
    - Regeneration Strategy
    - Replacement LDP.

Topic	Commitment	Source
District and Local Centres		
Securing Welsh Government Targeted Regeneration Investment Programme funding for South Riverside Business Corridor, Roath & Adamsdown business corridor, Cowbridge Road East, and wider district and local centres		Corporate Plan
New Regeneration Strategy by February 2023 to support district and local centres (aligning with WG Transforming Towns Programme)		Corporate Plan Recovery & Renewal Plan
Supporting the vitality and viability of district and local centres		Corporate Plan
Applying good place-making principles to the city centre, major new settlements and developments, as well as existing communities		Corporate Plan
Public realm improvements		Recovery & Renewal Plan
Greening of spaces		Recovery & Renewal Plan
Investment in active travel – safe and segregated cycling routes, safe walking routes		Recovery & Renewal Plan
Additional promotion – via 'Visit Cardiff Neighbourhoods' campaign		Recovery & Renewal Plan
Consider the expansion of existing city centre management arrangements to include district centre management to keep each centre clean, attractive and vibrant		Recovery & Renewal Plan
City Centre		
Implement City Centre Recovery Action Plan		Corporate Plan
Establish new city centre management arrangements, with a stronger partnership with the Business Improvement District		Corporate Plan Recovery & Renewal Plan
Work with partners, including FOR Cardiff, to adapt and re-purpose the city for post-Covid recovery		Corporate Plan
Establish new events strategy and invest in visitor infrastructure to promote Cardiff as a visitor destination		Corporate Plan
Apply good place-making principles to city centre		Corporate Plan
City centre marshals		Recovery & Renewal Plan
New permit arrangements for businesses		Recovery & Renewal Plan
Animation of key locations		Recovery & Renewal Plan

New squares, green streets with proposed new public spaces at St Mary Street south, Greyfriars Road, Park Place, and Metro Central south	Recovery & Renewal Plan
Cycle loop around the city centre to connect each of the key city cycleways with each other	Recovery & Renewal Plan
Parklets, street greening and more flexible outdoor uses of public space across the city centre	Recovery & Renewal Plan
Work with Welsh Government's Transforming Towns programme to support city centre regeneration schemes, street frontage improvements and public spaces	Recovery & Renewal Plan
Workspace	
Support development of new commercial premises for post-covid demand for workspace	Corporate Plan
Working with partners to attract investment into innovation and start-up space across the city and support the sector in adapting to the requirements of a post Covid economy	Corporate Plan
Develop proposals for a 'meanwhile use' and incubator space programme for empty and underutilised properties and places	Recovery & Renewal Plan
Support investment in co-working, innovation and start-up hubs within our city's communities, including touch-down hubs for public sector workers, focussing on areas of highest deprivation as a starting point	Recovery & Renewal Plan
Establish plans for new creative hubs for businesses both in the city centre and in our district centres, providing flexible space for artists and creatives across Cardiff	Recovery & Renewal Plan
Support the development of a new Tramshed Tech network in the city to provide a full spectrum of support for emerging tech business, developing space, skills support, networks and links with finance for new and established businesses	Recovery & Renewal Plan
Support the development of a business case for a new Life Sciences Park with the Cardiff and Vale University Health Board that accelerates the development of the city-region's life sciences sector, and attracts the best start-up businesses in the sector	Recovery & Renewal Plan
Bring forward proposals for incubation space and business expansion space for the fintech, creative and cyber security sectors.	Recovery & Renewal Plan
Businesses/ Sectors Support	

Work with Cardiff Clwstwr Creadigol to support the growth of creative enterprises in the city	Corporate Plan
Develop proposals for a new creative hub in the city centre to support production and performance	Recovery & Renewal Plan
Develop a new creative partnership for Wales in the heart of Cardiff Bay to develop more home-grown productions and support local jobs and businesses	Recovery & Renewal Plan
Support Cardiff Music Board – develop an annual international music festival that supports the local cultural sector	Corporate Plan
Develop a Cultural City Compact and take forward a new Cultural Strategy	Corporate Plan
Support own businesses in developing our visitor economy by establishing home-grown events sector	Corporate Plan
Work with Welsh Government to establish a tax and regulatory environment that can accelerate recovery	Corporate Plan
Signposting and promotion of business support scheme	Recovery & Renewal Plan
Establish an Equity Fund for high growth businesses in the city	Recovery & Renewal Plan
15-minute City	
Establish a '15-minute city toolkit' to accelerate district centre regeneration, including housing- and transport-led improvements	Corporate Plan
New Regeneration Strategy to support 15-minute principles	Corporate Plan
Support the vitality and viability of district and local centres and deliver the'15-minute city' approach to all major centres by 2027	Corporate Plan

Appendix 2 – Impact on Small Businesses

In November 2022, FSB (UK) issued a press release[65] regarding the **impact of rising energy bills**, highlighting:

- 63% say energy costs have increased this year compared to last year – 44% report a doubling of bills, 19% report a tripling or higher of bills
- 46% have already raised prices but these do not cover full cost increases
- 25% small firms plan to close, downsize or restructure if energy bills relief ends in April 2023 – this rises to:
    - 42% in accommodation and foods sector
    - 34% in wholesale and retail
    - 29% in manufacturing
- 44% of small firms expect to further raise prices if energy bills relief ends in April 2023
- 18% will keep prices the same because customers cannot afford further increases
- 30% have frozen growth plans due to soaring energy costs.

FSB (UK) has suggested the UK Government:

- Continue support under the current Energy Bill Relief Scheme to avoid a cliff edge on April 1, 2023
- Consider the size, not just sector or geography, of firms when determining which businesses are vulnerable, and therefore entitled for further support
- Maximise planning certainty over the long-term so that small businesses can plan ahead, and
- Help small businesses to invest in energy efficiency, through incentives like voucher schemes.

FSB Cymru informed this Inquiry an FSB UK survey shows that, in October 2022,:

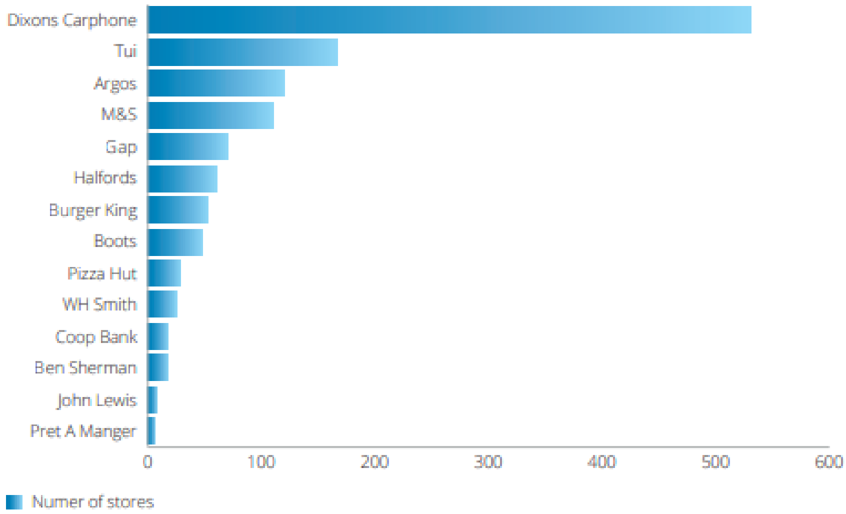
- 89% of businesses surveyed said costs rising over past year
    - 38% said costs rising significantly
    - 60% said utilities / energy have increased significantly
    - 48% said materials and other inputs have increased
- 43% said revenue decreasing – up from 31% in previous quarter
    - 41% said they expect revenue to decrease in next quarter
- 50% said they expect to grow
- 50% said access to credit is an issue
    - 46% only successful in accessing credit
- 54% said late payments are an issue

[65] One in four small firms plan to close, downsize, or restructure if energy bills relief ends in April next year, new survey reveals | FSB, The Federation of Small Businesses

Appendix 3 – High Streets

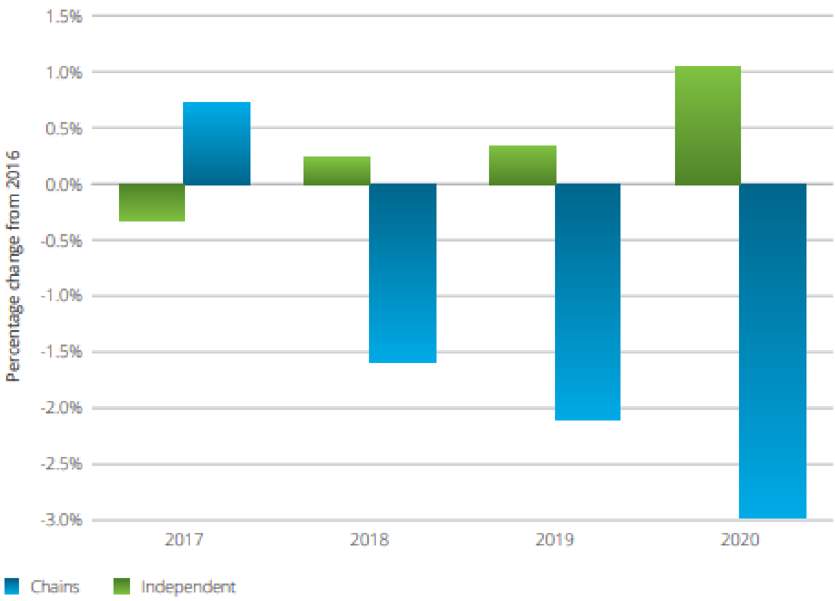
What next for the high street?: part two – A revival – Deloitte – January 2021:

Figure 1. Announced store closures 2020



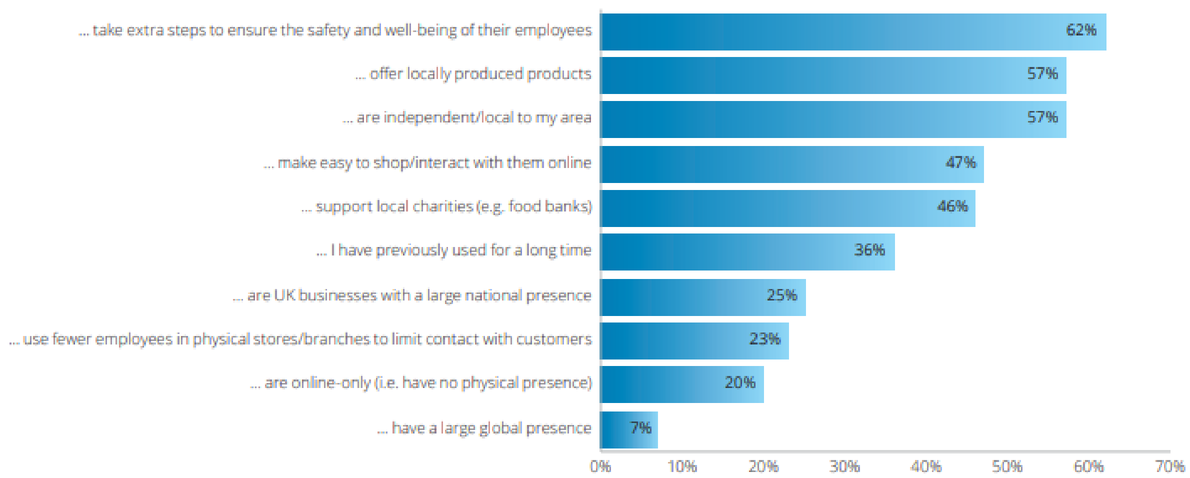
Source: Deloitte LLP

Figure 2. Percentage change in independent and chain shops from 2016



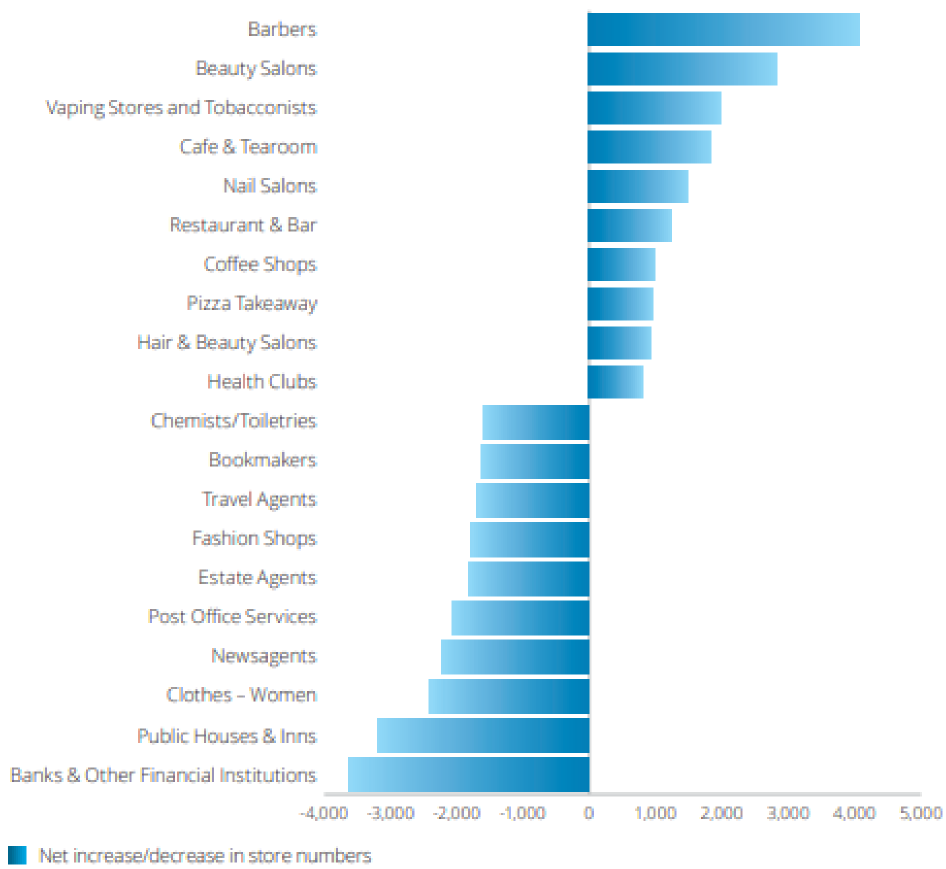
Source: Deloitte LocationEdge/Experian

Figure 3. Following the original lockdown, respondents have been more likely to spend money at businesses that ...



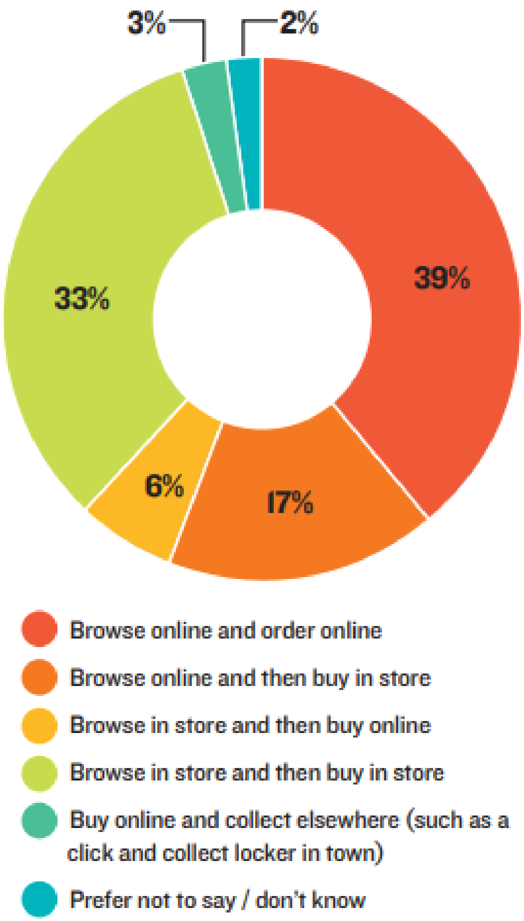
Source: Deloitte Digital

Figure 4. Top ten growing and declining subcategories – Net change in store numbers since 2013



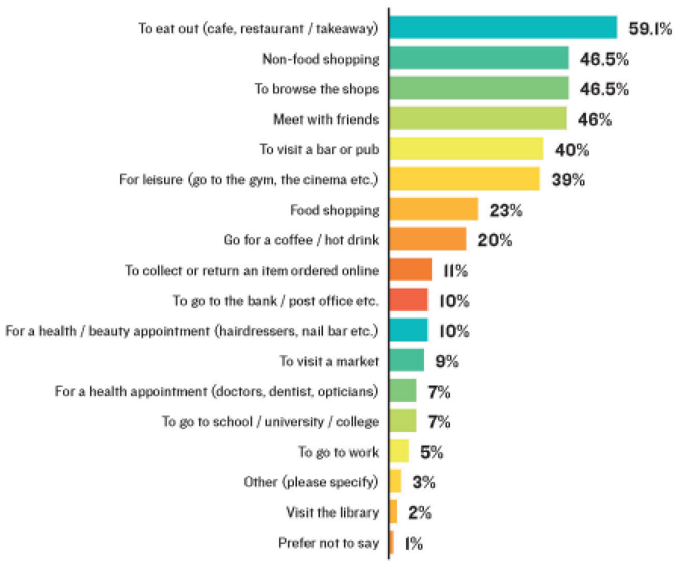
Source: Local Data Company

Figure I: Young People's preferred shopping methods



Source: Lichfields survey of 16-25 year olds - September 2019

Figure 3: What are the main reasons why young people visit town centres?



Source: Lichfields survey of 16-25 year olds - September 2019

- Deloitte highlight that high streets must:
    - reflect local demographics – not every high street needs an artisan bakery
    - reflect changing shopping habits –
        - provide retail for 'self' rather than 'stuff' e.g., barbers, beauty salons, cafés, coffee shops, tearooms, restaurants, bars, takeaways
        - recognise rise in ethical shoppers who care how staff and customers are treated, who care about supply chains and environmental issues
    - create the right environment – not necessarily expensive 'bright lights' experiences, but warm, welcoming, friendly, personalised services etc.[66]

- Deloitte highlight the need to:
    - Rethink the landlord tenant relationship – as economic partners not opponents
    - Shape and fund regeneration – reflect unique local identity and capitalise on strengths.[67]
- This Inquiry heard that it is also important to:
    - Have investments and policies designed to increase consumer demand
    - Improve the skills of residents – higher-skilled residents have higher wages on average – increases local demand for goods and services[68]
    - Create the right conditions for businesses to locate –high-quality office space and 'experience' leisure economy
    - Use planning powers to move high streets from an over-reliance on retail towards the 'experience' leisure economy.[69]

- Centre for Cities argues
  'To secure the long-term future of British high streets we require a rethink of regeneration strategies, strengthening the role city centres play as a place of production, not just consumption. Policy must focus on improving the skills provision of city residents and making city centres more attractive places for knowledge-based businesses.'

[66] What next for the high street?: part two – A revival – Deloitte – January 2021 – downloaded 14 October 2022
[67] As above
[68] Evidence Briefing: local growth, high streets and town centres – What Works Centre for Local Economic Growth - 2021
[69] High streets | Centre for Cities

"Good jobs and a strong local economy are the keys to saving high streets. Any interventions that seek to improve cities' amenities without boosting consumer spending power are doomed to fail from an economic perspective." – Andrew Carter, Chief Executive of Centre for Cities[70]

- The Arup report 'Towards Superbia' (2022)[71] imagines local high streets where shops, car parks and empty lots are adapted into art galleries, maker spaces, co-working officers, health centres and playgrounds, connected by contemporary public transport with safe walking and cycling networks linking to communities.

- The Arup report recommends:
    - 3 immediate interventions:
        - Deliver low-cost workspace to support start-ups, training and close to home working
        - Utilise vacant shops as 'test sites' for new businesses that could include hospitality and retail
        - Redesign the street by widening footpaths to support social distancing, provide space for cafes and create accessible transport stops
    - 5 longer term recommendations to bounce forward into Superbia, including the following that are relevant to this Inquiry:
        - Diversify our suburban main streets to meet new needs – flexible co-working and co-learning spaces, tactical interventions in the public realm to activate local community facilities, support local business with digital skills, networking and local retail champions
        - Prioritise walking and cycling improvements – especially around local centres
        - Innovate the funding and delivery mechanisms - e.g., meanwhile uses for spaces, collaboration and partnerships including suburban BIDS.[72]

[70] High streets | Centre for Cities – downloaded 23 November 2022
[71] Towards Superbia - Arup – downloaded 24/11/22
[72] Towards Superbia - Arup – downloaded 24/11/22

- In September 2021, Audit Wales published their report '*Regenerating Town Centres in Wales'*, which sets out their findings of how local authorities are managing and regenerating their town centres.

- The Audit Wales report highlights that local authorities, along with Welsh Government: '..*need to deliver integrated solutions and make brave decisions going forward, providing honest, strong and dynamic leadership. Local authorities are well-placed to prioritise and led on place planning but need to be clear on the purpose of their town centres and involved public sector partners, the third sector, town and community councils, communities and businesses in decisions. Valuing and using information to fully understand problems and identify the best solutions have to be improved. Local authorities will also have to become increasingly more interventionist to address the challenges facing town centres.*'

- The report highlights that local authorities need to apply the 4 Is:
    - Intention – have a clear vision with a plan for change – set out ambitions and show drive and direction and recognise interconnectedness of places. Consider alternative uses such as housing, arts, culture, leisure, public realm, green and blue spaces.
    - Involvement – involve communities and businesses in designing place plans, utilise BIDS
    - Informed – strengthen quality and scope of data, don't simply rely on footfall and empty properties, but seek to understand catchment demographics and shopping patterns, utilise digital data on travel movements, parking, mobile phone activity, social media interaction, and Wi-Fi usage to give insight into changing use of town centres. Strengthen evaluation of previous regeneration schemes to learn lessons and help shape new plans
    - Intervention – once created a vision, need to use available powers to lever change e.g., partnership working, advice and guidance, land acquisition and land assembly, development control and regulatory powers, improvement grants and loans, as well as enforcement actions.
- Audit Wales makes 6 recommendations, including 2 for local authorities, as follows:

R4 – *We recommend that local authorities take appropriate action, using these existing powers and resources available to achieve the best possible outcome for town centres by:*

- *Using alternative methods of enforcement before using Compulsory Purchase Orders as a last resort*
- *Integrating enforcement strategies with wider departmental strategies across housing, environmental health, planning and regeneration teams to make more effective use of existing skills and resources, and*
- *Ensuring there is capacity and the right expertise to use the full range of powers, working in collaboration with other councils to achieve good outcomes.*

R6- *We recommend that local authorities use our regeneration tool to self-assess their current approaches to identify where they need to improve their work on town-centre regeneration.*

Appendix 4 – Broadband – UK and Wales

- Broadband provision is a reserved matter, meaning UK Government lead on it and Welsh Government interventions are limited to grant funding and using devolved policy levers – such as planning and business rates – to encourage private investment.

- The technologies underpinning broadband have developed rapidly over the last few years, improving capacity, speed and reliability. Early technology involved using copper wire cables (ADSL) whereas now broadband can be delivered using fibre optic cables as well as via hybrid fibre coaxial cables (used by Virgin Media O2). There are also differences between broadband being delivered to a cabinet exchange, with separate connections from these to individual premises by copper wire (FTTC), and broadband being delivered to the property/ premises entirely over fibre optic cables (FFTP).

- The UK Government has set up "Project Gigabit", a £5bn UK-wide project with a "Gigabit Broadband Voucher Scheme" created to support rural areas with the installation costs of high-speed broadband. The Senedd's Climate Change, Environment and Infrastructure Committee heard from Welsh Government deputy minister Lee Waters MS, who told the committee UK funding has "failed to reflect the true cost of deploying in the Welsh landscape."[73]

- The Welsh Government has several schemes to boost broadband provision in Wales, including:
  - extended Superfast Cymru programme
  - Local Broadband Fund
  - Access Broadband Cymru grant scheme

- The Senedd's Climate Change, Environment and Infrastructure Committee issued a report in August 2022 stating people in Wales are being left behind due to inadequate broadband speeds, particularly in rural areas. The report:
  - warns that there is a risk that during the cost-of-living crisis, superfast broadband access will become a luxury that many will not be able to afford

[73] Sub-par, unreliable broadband connections 'excluding people from modern life' in Wales - Wales Online downloaded 02/08/22

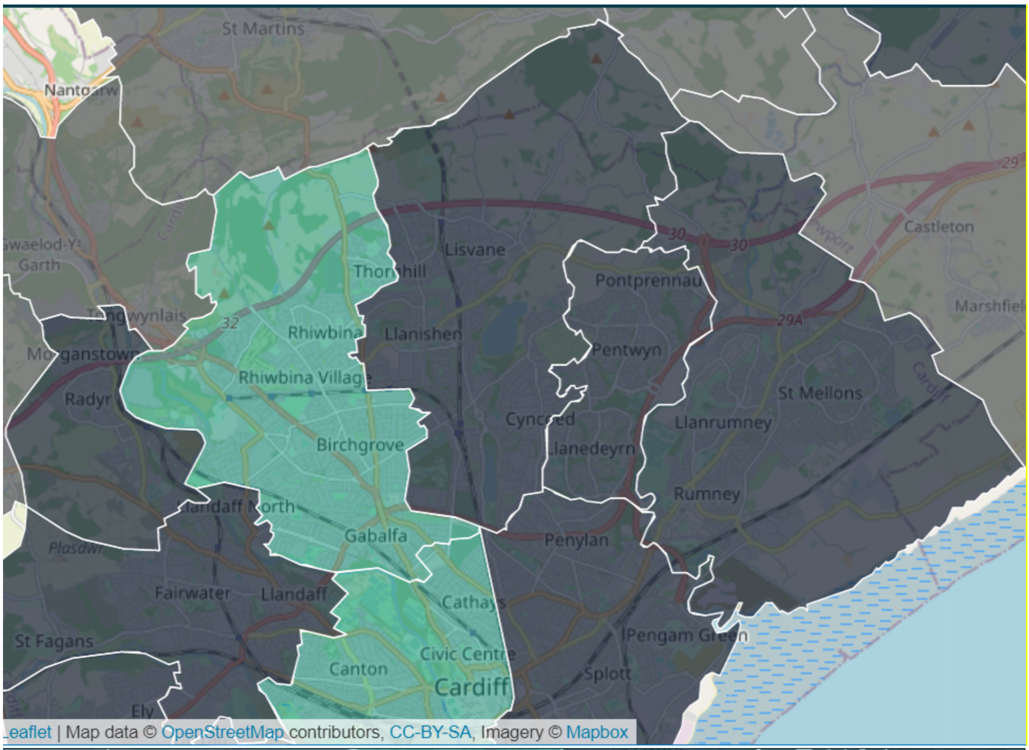
- highlights that only 1.2% of those eligible for a 'social tariff' (available to people receiving government benefits) have accessed the scheme, meaning many low-income households are over-paying for broadband
- found superfast broadband availability in Wales is now at 96%, but figures from Ofcom show that take-up in Wales is only around 63%, probably due to cost
- Warns that without meaningful engagement between the UK and Welsh governments, there is nothing to prevent the UK administration creating a scheme that does not meet the needs of Wales[74]

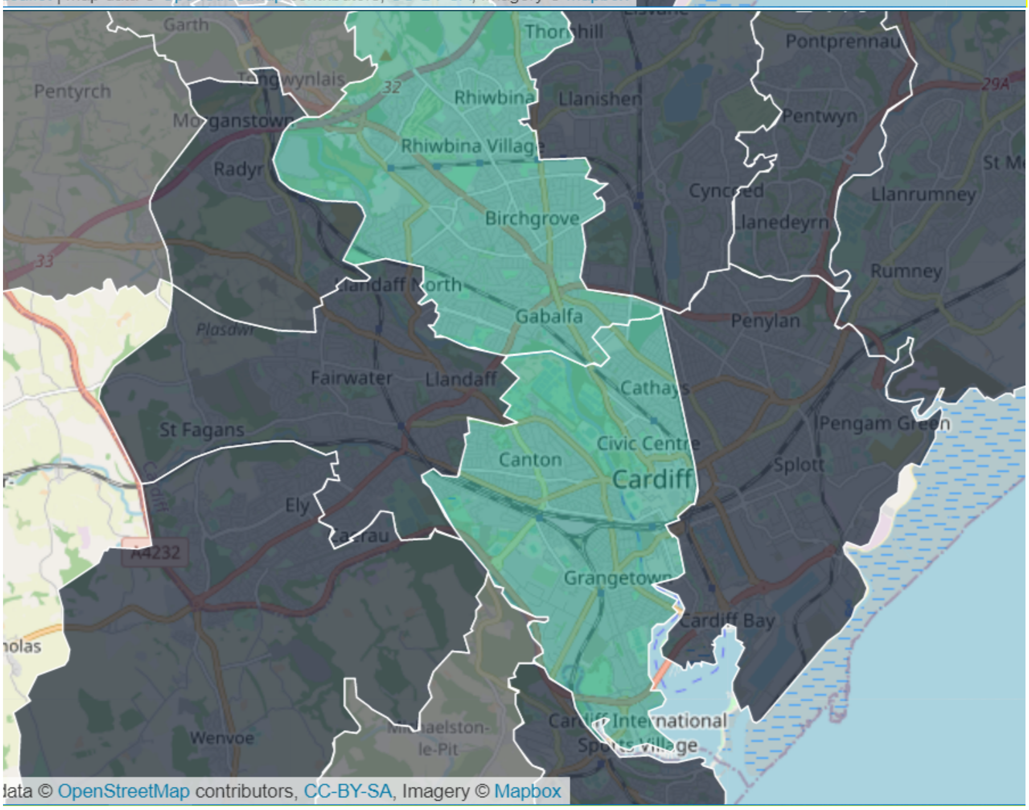
- The Senedd committee has:
  - called on the UK Government to raise the amount of support available for individuals and businesses to address the particular needs in Wales
  - called on the UK Government to urgently look at raising the USO cap
  - recommended action should be taken to make enrolling for social tariffs clearer and simpler
  - recommended that the Welsh Government should set out its position in legislating to require full fibre connectivity for all new-build housing developments
  - recommended that the Welsh Government should undertake a piece of work to consider the impact of the cost-of-living crisis on its Digital Strategy and report back on its conclusions within six months
  - recommended that the Welsh Government should explain how its Digital Strategy will remove barriers for groups who are disproportionately affected by a lack of digital connectivity.[75]

[74] Sub-par, unreliable broadband connections 'excluding people from modern life' in Wales - Wales Online downloaded 02/08/22
[75] As above

Appendix 5 – FTTP Broadband Maps - Cardiff

Openreach have maps available showing where and when they are building Ultrafast Full Fibre broadband. The ones for Cardiff are shown below, but it is easier to see by following this hyperlink as you can zoom in more:
[Where and when we're building Ultrafast Full Fibre broadband | Openreach]





Appendix 6 - Scrutiny Research Report

A survey of the needs and issues of remote workers and co-workers, small businesses and traders, and independent artists and freelancers in Cardiff.

A report prepared for the Economy and Culture Scrutiny Committee Task and Finish Inquiry on Shaping Cardiff's Post Pandemic Economic Recovery.

Scrutiny Research

January 2023

Table of Contents

Research background and objectives

Cardiff Council's Economy and Culture Scrutiny Committee is undertaking a Task and Finish Inquiry on how Cardiff Council can shape and support Cardiff's post pandemic economic recovery. As part of this Inquiry, Members commissioned research to look into the views of small business owners, local artists and remote workers on the challenges that they face, and the support and services they need in recovering from the economic impacts of the pandemic and as well as support needed relating to the implementation of 15-minute city concept in Cardiff.

More specifically this research will look into these stakeholders' views on:

- their access to broadband provision and how this has affected them;
- the 15-minute city concept and how this will impact on City centre and local and district centres;
- the issues and challenges they face following the Covid pandemic and the current cost of living crisis;
- what the Council could do to support; and
- how access can be improved in local and district centres

Research methodology

A survey questionnaire was formulated as the main tool used to collect the data required for this research. To inform the formulation of the questions and categories that were used in the questionnaire, a review of relevant literature was undertaken. Drafts of the questionnaire were sent to all Task and Finish Inquiry Members, the Operational Manager – Neighbourhood Regeneration and the designated Operational Manager in the Economic Development Directorate, to seek their feedback, comments and suggestions on the survey questions. Survey questions were inputted into the SNAP software to enable on-line completion of the survey. The support of local business contacts and business network groups known to Cardiff Council were sought to help with the distribution of the on-line link to the survey questionnaire. To further encourage the completion of the questionnaire, survey flyers providing information on the survey including the online link and a QR code, were distributed by hand in selected local and district shopping centre areas. Posters on the survey were distributed and displayed in Cardiff Council owned Leisure Centres and Hubs. Due to time and resource constraints, the survey was live online for only 10 days. The limited time available for completing the survey may have affected the overall response rates.

In total, 34 respondents completed the survey on-line. This includes 19 remote workers, 3 individuals making use of co-working spaces and 12 small business owners and traders.

Summary of findings

This research was commissioned by the Economy and Culture Task and Finish Inquiry on how Cardiff Council can shape and support Cardiff's post pandemic economic recovery. This research looked into the views of small business owners, local artists and remote workers on the challenges that they face, and the support and services they need in recovering from the economic impacts of the pandemic and as well as support needed relating to the implementation of the 15-minute city concept in Cardiff. To collect these stakeholder views, an online survey questionnaire was formulated and was made available to business network contacts. Information on the web link and QR code were made available using flyers and posters that were distributed in selected local and district centres and Cardiff Council Hubs and leisure centres. The survey was available on-line for 10 days and was completed by 34 respondents in total.

The majority of respondents (94%) confirmed that they have access to broadband facilities when running their business or working remotely. However, less than half of all respondents (44%) were satisfied with the connectivity of their broadband provision with nearly a third (30%) indicating that they were dissatisfied with their existing facility.

Overall, more respondents (54%) stated that their broadband connectivity has affected their business operations or their ability to work remotely than those (32%) who stated they have not been affected at all.

Those affected confirmed that this had limited their ability to work remotely (82%), their reach of customers (63%), their access to information and/or software to support business processes (60%) and their ability to market goods and services provided (57%). Less than half (47%) indicated that this limited their ability to receive orders and a third (33%) cited that this affected their ability for distribution and delivery (33%). A much smaller proportion indicated that this has affected the speed of processing (21%) and cashless transactions (14%).

Many respondents (in the range 53% - 68%) held a positive view on the impacts of the 15-minute city concept, with around a quarter (in the range of 21% - 26%) indicating strong agreement that the 15-minute city concept will: improve street safety (21%); create more vibrant and liveable of local neighbourhoods (24%), improve air quality (26%) and reduce carbon emissions (26%). It is notable however, that a significant proportion of respondents need to be better informed about the possible impacts of the 15-minute city concept. As many as 40% indicated that 'they would need more information to fully understand its implications' and nearly a third of respondents (30%) were 'not sure and don't know much' about it.

Respondents' views are quite divided on the potential negative impacts of the 15-minute city concept. More than half (59%) agree that this could lead to increased house prices in neighbourhoods with more facilities. However, a much smaller proportion (33%) believe that this could increase social divides between the rich and poor. Almost as many expressed disagreement on the views that the 15-minute city concept could lead to increased discrimination and stigmatisation (30%) and increased inequalities (30%) as those who agreed (24% and 27%) with these statements. It is notable that more than a third respondents (in the range 35-38%) neither 'disagree' nor 'agree' with the possible negative impacts of the 15-minute city concept.

With regards to its impact on the city centre, nearly two thirds were in agreement that the 15-minute city concept could 'reduce the footfall to the city centre' (62%) and lead to the possible 'decline of the City centre' (59%). However, when asked how this could transform the city centre, around half (47%) see the city centre as continuing to provide the night time economy, eating and drinking establishments, serving as a commercial and shopping destination and promoting its culture and heritage (53%). A lower proportion (38%) agree on an increasing role in 'highlighting its history'.

A substantial proportion of respondents believe that the 15-minute city concept will have positive impacts on local and district centres. Many believe that this could lead to increased amenities and facilities (62%) and increased footfall in local shops and businesses (65%). Respondents agree that such a development would increase the need for disabled parking

(50%) and parking space for non-motorised vehicles (47%). When asked about other possible impacts, a number of respondents have the view that this will not have an impact while another felt that its' too early' to make a judgement about it. According to some small businesses/ traders, other positive impacts that this could bring include improvements in mobility and transport links as well as diversity in the local neighbourhood. A concern was raised on a possible negative impact of the 15-minute city concept in potentially limiting social interactions and further reinforcing social divides between neighbourhoods.

To improve access to local and district centres, respondents cited improvements needed in local infrastructure and services. The majority identified the need for: frequent and reliable public transportation (77%); safe walking routes (71%); and safe cycling routes (53%). Half of respondents (50%) cited the need for Cardiff 'Ovo' bikes.

Respondents also offered more specific suggestions on improving public transport provision, connections and infrastructure as well as its affordability. Others highlighted the need for better local infrastructure in making these more people and child friendly and the provision of facilities that will encourage social interaction and safety within the communities. These include improving pavements, pedestrianisation of streets, sitting areas as well as children activity and play areas, more green spaces and more local parking spaces. It was also suggested that increasing footfall could also be achieved by holding local events and by improving community safety with enhanced police presence.

Some respondents highlighted the need for improvements in city planning approaches. There was a call for more improved planning and land use as well as a concern raised on the extent of housing development in certain areas in Cardiff. A suggestion was raised to learn from development approaches used by other European cities as well as in using planning strategies that encourage more diversity in the types of businesses. The need to improve and maintain traditional Victorian properties to highlight cultural heritage was also suggested.

When asked about the main issues that have affected them, all of the small businesses and traders (100%) identified increasing costs of energy and fuel, reduced consumer spending, and increasing costs and prices of supplies and materials. Additionally, reduced trading due to reduced footfall was also another challenge cited by majority of small businesses (83%) and traders. More than half (59%) stated that their capability and resources to go on-line have affected their operations. A much smaller proportion (25%) of all respondents stated that this issue has not affected them at all. Other issues that have affected small businesses are the availability of parking facilities for customers, the cost of rent, business rates and bills and landlords who are unsympathetic to the impact of covid on small businesses and traders.

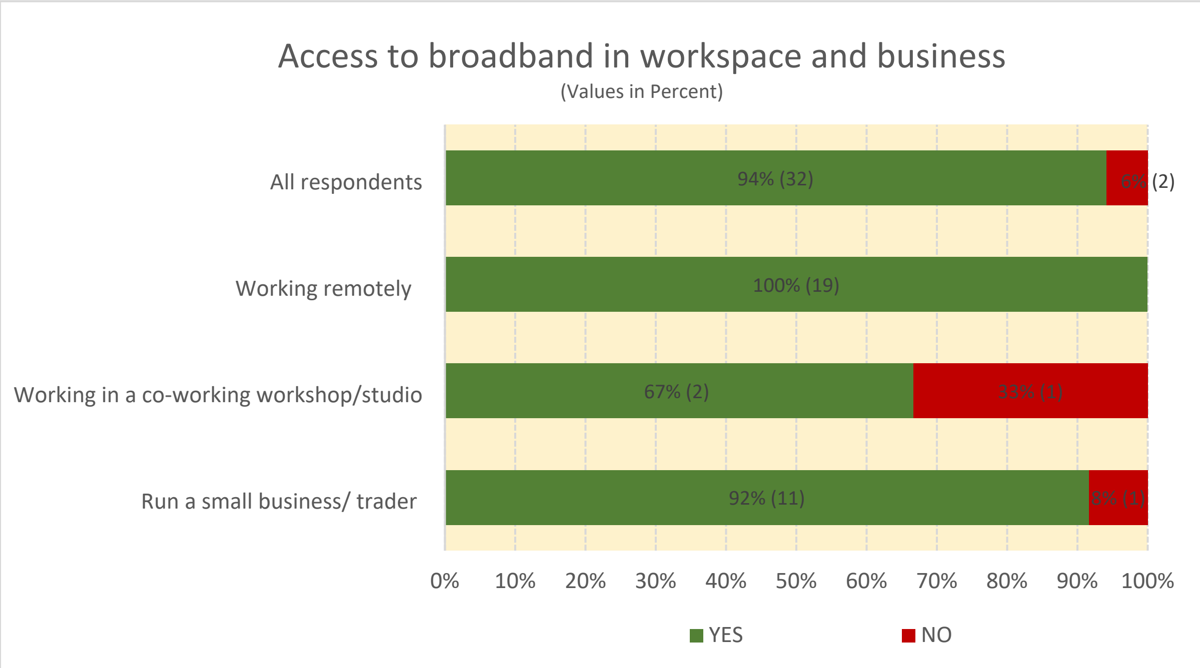
Amongst remote and co-working respondents, the increasing costs of energy and fuel (69%) and the increasing costs and prices of supplies and materials (53%) were the key challenges that have affected them. The decreasing availability of freelance work due to Brexit and the post pandemic funding crises was also highlighted as a challenge. Other issues raised include concerns relating to community safety, access to public transport, shops, slow broadband connections and the availability of local co-working spaces.

Another challenge is information on available remote working spaces that can be accessed locally. Most respondents (56%) stated that they are not aware of provision that are available within 15 minutes' walk or cycle from their home. Only around a quarter of those working remotely (27%) and small businesses and traders (23%) confirmed knowledge of the various remote workspace provision.

Respondents were also asked how the Council can provide support in recovering from the pandemic. Small businesses/traders stated that they would welcome some reduction or the freezing of business rates, support for their energy bills, and available support in dealing with business tenancy issues with their landlords. Remote workers indicated that some reduction in Council tax or direct financial aid would benefit them as well as increasing provision of well-equipped and serviced co-working spaces, and improvements in local broadband speeds. The need for green spaces and the benefits it brings to the inner city and amongst remote workers were also highlighted. Other specific suggestions include better use of public money, improved engagement with the Charity sector and the promotion of local neighbourhood areas.

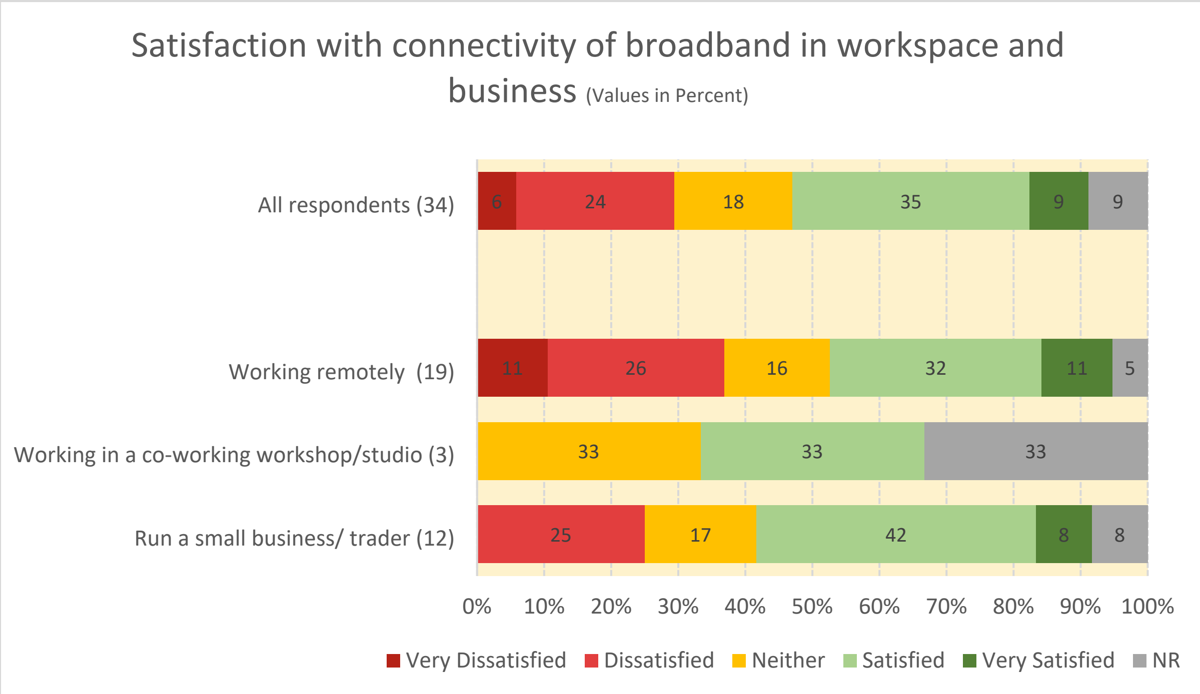
Survey results

Access to broadband in workspace and business



The results above show that the vast majority of respondents (94%) have access to broadband in their current workspace of business. Only a small proportion (6%) indicated a negative response.

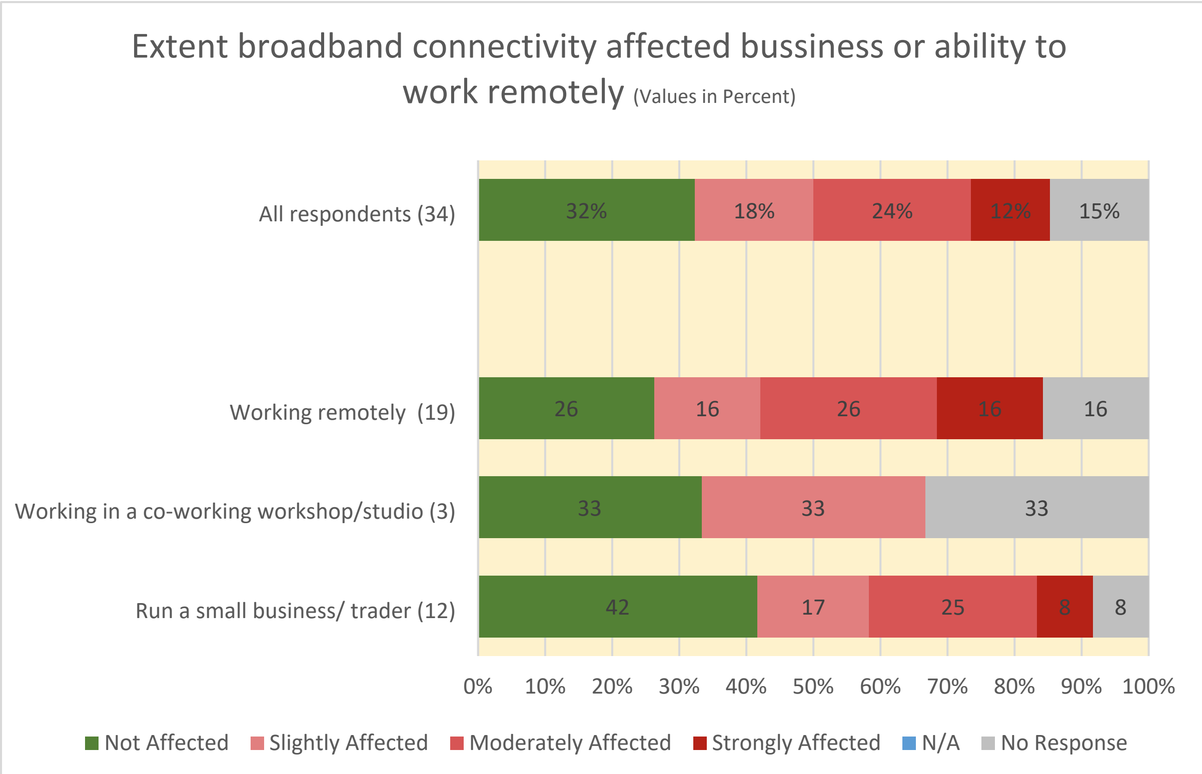
Satisfaction with broadband connectivity



A substantial proportion of respondents (44% of total) indicated that they are 'Satisfied' or 'Very Satisfied' with their broadband provision. A comparatively smaller proportion stated that they are 'Dissatisfied' or Very Dissatisfied,' however it is worth noting that this group accounts for nearly a third (30%) of all respondents.

Half (50%) of small businesses/traders indicated that they were satisfied with their broadband, however there is also a substantial proportion (42%) who indicated dissatisfaction with their current provision. Amongst remote workers, nearly half of them (43%) indicated a positive response, whilst more than a third (37%) indicated dissatisfaction with their broadband provision.

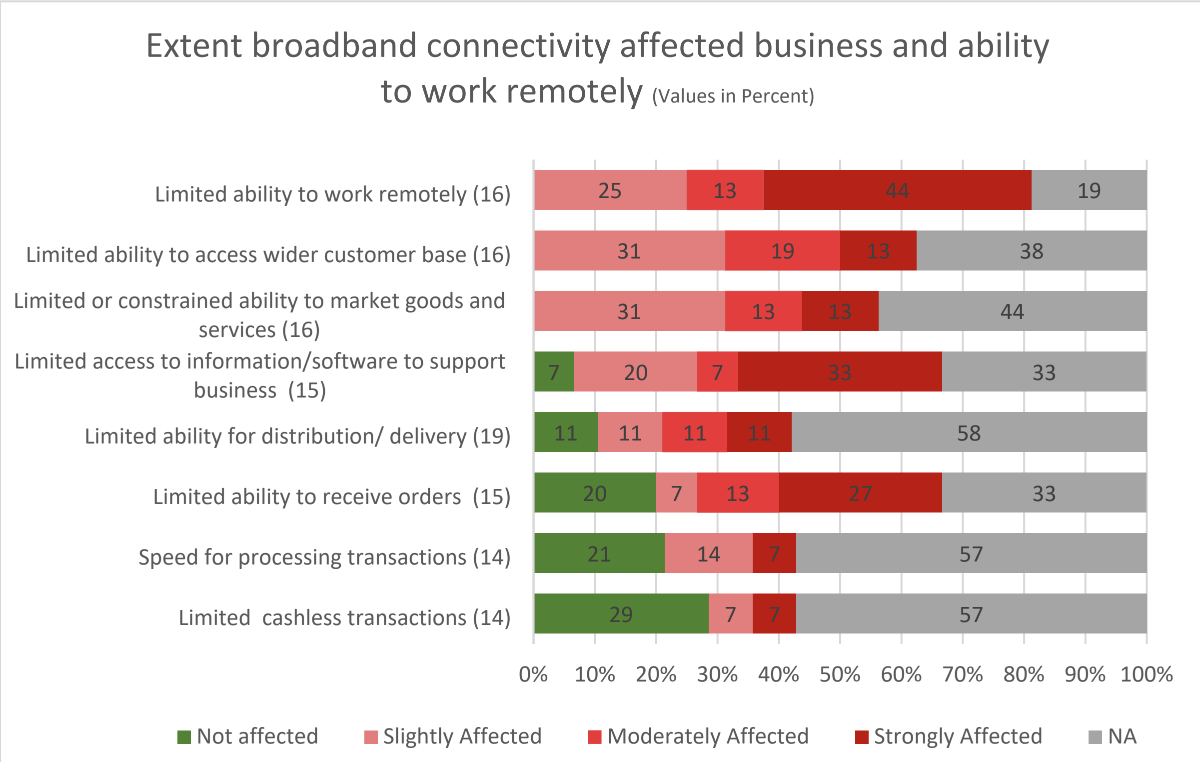
Extent that broadband connectivity has affected work and business



Overall, more than half of all respondents (54%) indicated that their broad band connectivity has to some extent affected their business operations or their ability to work remotely. A much smaller proportion of nearly a third (32%) stated that this has not affected them at all.

A slightly greater proportion of those working remotely (in total 58%) indicated that their work/business has been affected by their broadband connectivity, compared with those owning small businesses (in total 50%) who gave similar responses.

How broadband connectivity has affected work and business



The result in chart above illustrates the responses (in percent) of those respondents who have confirmed that their broadband connectivity has affected their business or work to differing extents.

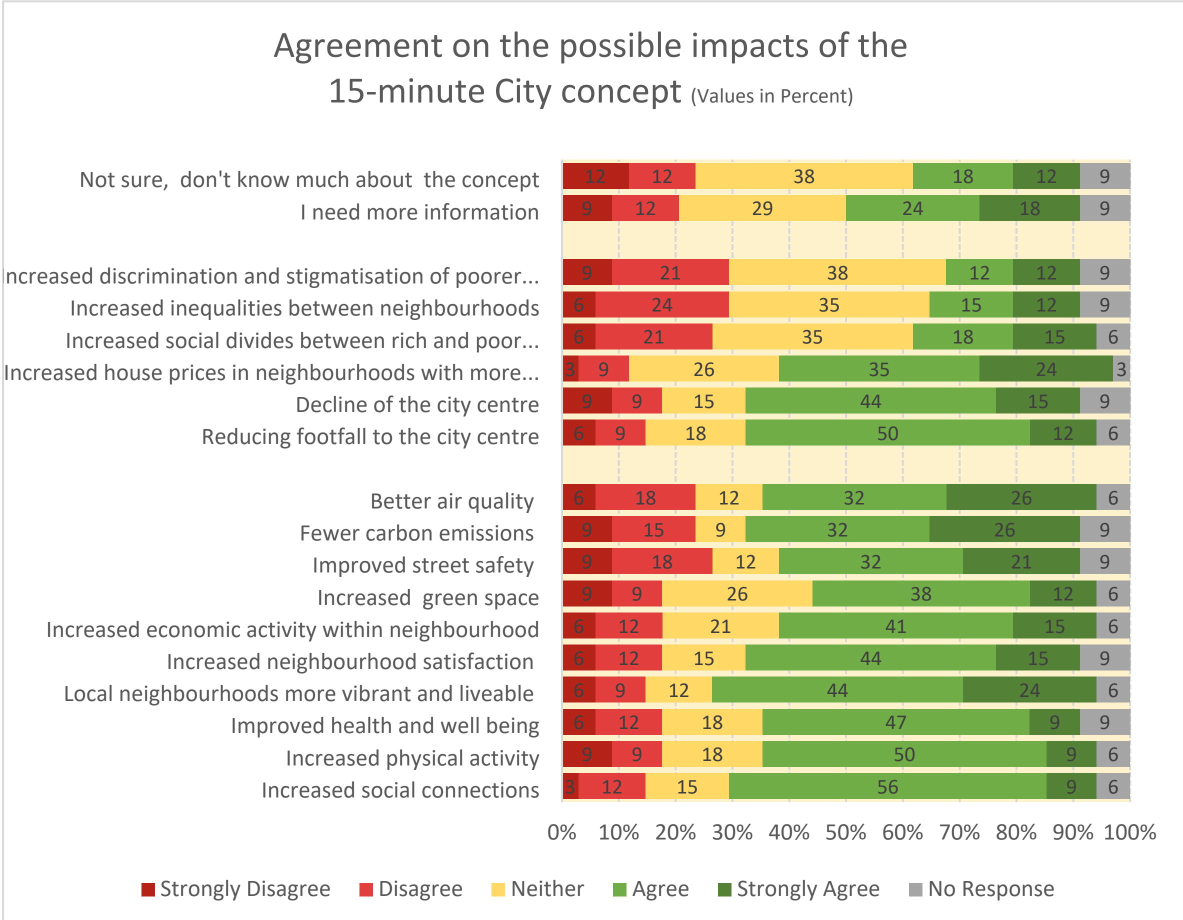
A substantial proportion confirmed that their broadband connectivity has adversely affected their ability to work or run their business. More than three quarters (82% of total) stated that this had limited their ability to work remotely. The majority also indicated that their connectivity has affected their reach of customers (63%), their access to information and/or software to support business processes (60%) and their ability to market goods and services provided (57%). Additionally, a substantial proportion confirmed that this limited their ability to receive orders (47%) and their ability for distribution and delivery (33%). A much smaller proportion indicated that this has affected their business transactions (14% and 21%).

How broadband connectivity adversely affected current business operations/ remote working in any other ways	
Respondent Type	**Response**
Working remotely	Yes
Working remotely	Virtual meetings.
Working remotely	No
Small business/ trader	No
Small business/ trader	We have a co-working space that people use that are unable to always utilise the fastest connection available.

When asked about other ways that broad band connectivity has adversely affected their work, three respondents provided additional information. One (1) of the respondents did not provide any details, while another stated that this affected the conduct of virtual meeting. Another stated that co-workers using their facility are unable to utilise the fastest broad band connection that should be available to them.

Two other respondents confirmed that their broadband connectivity has no adverse effect on how they work.

Views on the impact of 15-minute city concept



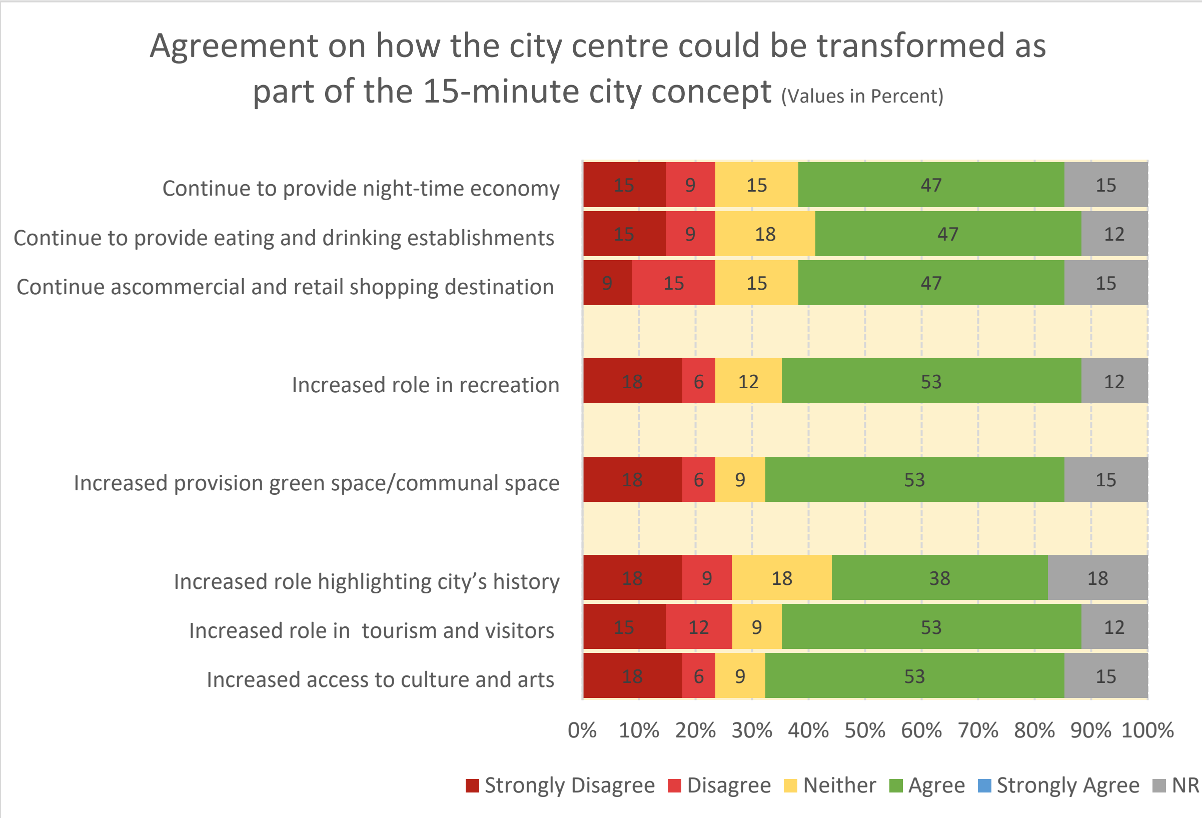
The results above show (upper section of the chart) that nearly a third of respondents (30%) are 'Not sure and don't know much about the 15-minute concept', with as many as 40% confirming that 'they would need more information to fully understand its implications.

Overall, the majority of respondents (in the range 53% - 68%) have expressed agreement on the positive impacts of the 15-minute city concept (in lower section of the chart). Around a quarter of all respondents (in the range of 21% - 26%) expressed that they 'Strongly Agree' that this will have a positive impact on improving street safety (21%), the liveability of local neighbourhoods (24%), its air quality (26%) and its carbon emissions impact (26%).

Respondents' views on the negative impacts (middle section of the chart) of the 15-minute city concept on social and economic inequalities are quite divided. Although more than half of respondents (59%) agree that this could lead to increased house prices in neighbourhoods with more facilities, a comparatively smaller proportion of respondents were in agreement that the 15-minute city concept could increase social divides between the rich and poor (33%). A much lower proportion agreed that this could lead to increased discrimination and stigmatisation of poorer communities (24%), increased inequalities (27%). In comparison, a slightly a higher proportion (30%) of respondents disagreed with the negative impacts relating to discrimination and stigmatisation and increasing inequalities. Overall, more than a third of respondents (in the range 35-38%) neither 'disagree' nor 'agree' with these possible negative impacts of the 15-minute city concept.

It is notable that nearly two thirds of respondents agree that the 15-minute city concept could 'reduce the footfall to the city centre' (62%) and lead to the possible 'decline of the City centre' (59%).

Views on the impact of 15-minute city concept to the city centre



Although, more than half of respondents (in previous chart) agree that the 15-minute city concept could lead to reduced footfall (62%) in the city centre and the possible decline of the city centre (59%), the results above show that around half (47% - 53%) see the city as continuing to have an important economic and cultural role.

Nearly half (47%) agree that the city centre continue to 'provide night-time economy', eating and drinking establishments, as well as serve as a commercial shopping and retail shopping destination. A slightly higher proportion (53%) were in agreement that the city centre could increase its role recreation (53%) and in providing green and communal spaces (53%).

More than half (53%) also agreed that the city centre can have an 'increased role in tourism and visitors' and in providing 'increased access to culture and arts'. A slightly lower proportion (38%) indicated agreement on an increased role for city centre's in 'highlighting its history'.

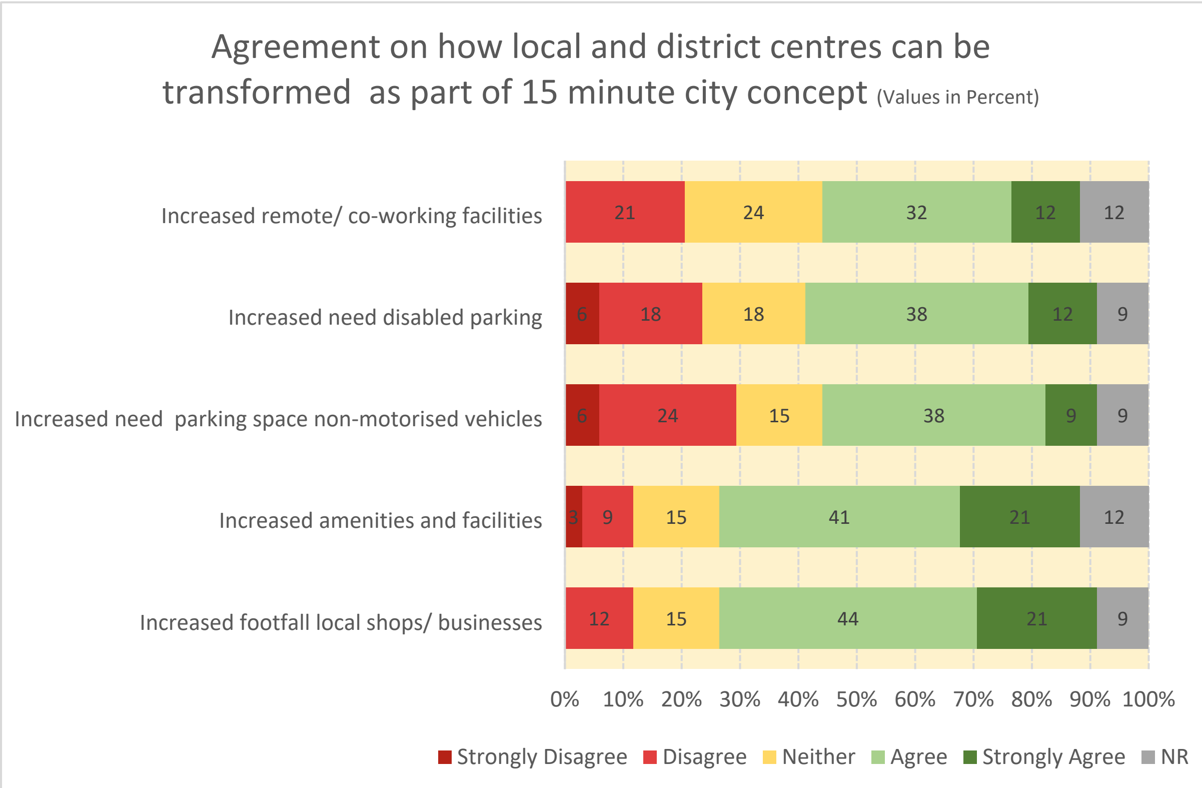
Other impacts will the 15-minute city concept have on the city centre	
Decline of the city centre	
Small business/ trader	Kill it completely
Working remotely	The city centre is terrible at the moment, and this will make it worse.
Working remotely	the city centre will be out of bounds as those of us who live in the suburbs will be taxed to travel there
Priorities and suggested improvements for the city centre	
Working remotely	The city is unsafe and scary at the moment, and dirty - the top priority should be to resolve that
Working remotely	Turn disused office space into affordable housing and SME provision, have a better mix of residential and commercial in city centre
Working remotely	Removing daily commute focus from the city centre and allowing it to develop its identity as a "destination" place for tourism, shopping and those looking for meeting/collaboration spaces. A clearer identify for the space gives a clearer steer for future planning and development.
Working remotely	The Council should spend more time protecting the city's heritage and improving its appeal and not bow to greedy developers building bland, faceless

	monstrosities. Build a city that people want to come to and generate wealth for everyone, rather than allowing developers to trash our city and profit in the process. Contrary to what city leaders say, you aren't doing enough, and you can and must do better.

Seven (7) respondents in total made additional comments on other ways that the 15-minute city concept could further impact on the city centre. Three (3) respondents expressed concern on how this would have a negative impact. A small business owner believes that this would 'kill the city centre.' A remote worker stated that this will worsen the existing condition in the city while another felt that this will further reduce footfall into the city centre. One (1) respondent highlighted the need to prioritise and address community safety and cleanliness issues in the city centre.

Four (4) respondents (remote workers) did not specify how the city centre could be affected by the 15-minute city concept but instead have made suggestions on improvements that can be made and strategies that can be adopted to improve it. Some of the remote working respondents (3) offered suggestions on specific aspects that planning and development in the city centre should address. A respondent suggested that a better mix of residential and commercial development should be made with disused office spaces transformed into affordable housing. Other suggestions include enhancing the city role as a 'destination' place for shopping and as a meeting place. The role of the city centre as a tourism destination was also highlighted alongside the need to protect it cultural heritage. In protecting the city's heritage, it was further suggested that development in the city should 'improve its appeal' and not involve 'building bland faceless monstrosities.' The appeal of the city could be enhanced in building a 'city that people will want to come and generate wealth for everyone' instead of developers 'trash our city for profits.'

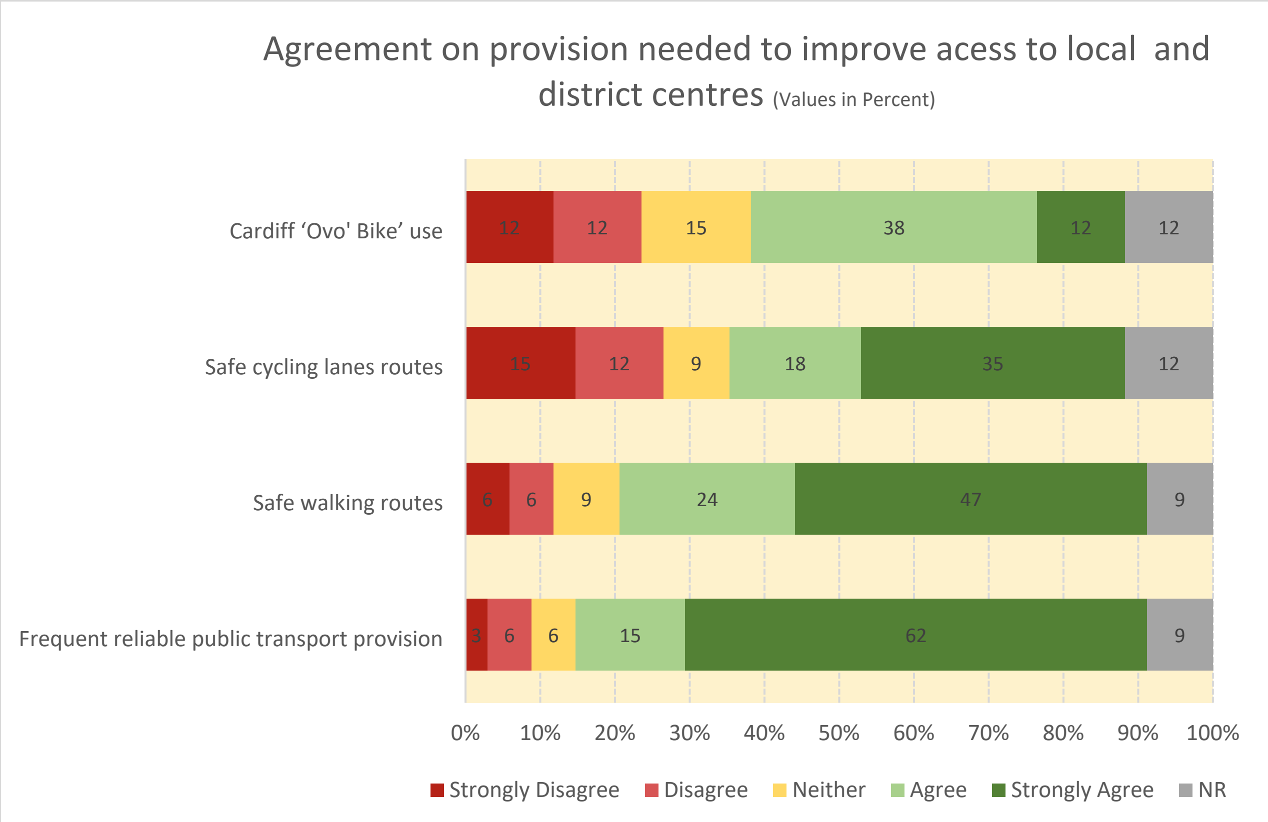
Views on how the 15- minute city concept will transform local and district centres



A substantial proportion of respondents (in the range 44%- 65%) agreed with the positive impacts and the improvements that can be achieved as a result of the implementation of the 15-minute city concept.

Nearly two thirds agree that this could lead to increased amenities and facilities (62%) locally and increased provision of remote and co-working facilities (44%). On the whole, this could lead to increased footfall in local shops and businesses (65%).

Around half of respondents agree that the transformation of the local and district centres would increase the need for disabled parking (50%) and parking space for non-motorised vehicles (47%).



To improve residents' access to local and district centres, the majority of respondents were in agreement that the provision for frequent and reliable public transportation (77%), safe walking routes (71%) and safe cycling routes (53%) are needed.

A slightly lower proportion of respondents (50%) agreed that the provision of the Cardiff 'Ovo' bikes are needed.

The results above suggest that most respondents believe that further investments on improving local infrastructure is required to improve access to local and district centres.

Views on other amenities or provisions needed to improve access to local and district centres

More pedestrian and people friendly infrastructure	
Small business/ trader (Rx)	encouraging local business to provide outside sitting spaces on pavements, evening pedestrianisation of local high streets…+
Working remotely	Good quality pedestrian walks, safe, clean in inner city
Small business/ trader (R*)	Better infrastructure, +
Working remotely (Rb)	.... as well as the walking/bike options for those attending from a local location…+
Working remotely	Children play /activity areas /venues
More greenspaces	
Working remotely (Ra)	More open GREEN spaces (the concrete space in front of the train station is a desperately depressing welcome to the city)…+
Reliable and affordable public transport	
Working remotely	Reliable public transport
Small business/ trader (R*)	…affordable, more reliable public transportation in all areas of Cardiff
Working in a co-working workshop/studio	Night-time public transport in North Cardiff would help those who have mobility issues move around and enjoy the area in a more eco conscious way.

Working remotely	most people work hybrid round here (North Cardiff), but public transport is shocking - workers need to access/spend in the centre too.
Improved parking facilities	
Small business/ trader	Parking
Small business/ trader	More/better parking facilities
Working remotely (Rb)	Increased (ordinary/non-disabled) parking spaces near the facilities so that I can meet safely and efficiently with colleagues based elsewhere across the city. These spaces need to be a mix of Short and Long Term (all day) spaces…+
Better city planning	
Working remotely (Ra)	…. more home-grown attractions (less unwelcome imports like the military museum), better city planning, more gentle development that so many other cities are developing and be bold: be more Paris or Barcelona and less Bracknell or Milton Keynes. .
Small business/ trader	More encouragement to bring in diverse range of businesses to the city centre
Community safety	
Working in a co-working workshop/studio	Policemen
Localised social events	
Small business/ trader (Rx)	…decentralised social events

Quicker response to community projects	
Small business/ trader (Rx)	Quicker response to community projects…+
Improvements in broadband	
Working remotely (Rb)	Broadband/Wi-Fi is also essential to being able to co-work or meet and work over coffee in these spaces. Mobile phone signal is also important so that I am contactable when popping out of the house and/or have a backup to my wired Broadband solution when working from home. Mobile signal in Radyr & Morganstown is currently poor and patchy, when by home Broadband goes down, I can't rely on it even for low-bandwidth tasks like texting or emailing colleagues to let them know I won't be joining them online.
None	
Working remotely	None
Working remotely	None

A total of 16 respondents provided a response to the question on what other amenities and provision will improve access to local and district centres. Of this number, 14 offered various suggestions and two others stated 'None' or no other amenities or provision are needed.

Several respondents (6) suggested improvements in local infrastructure in making these more people and child friendly and provision of facilities that will encourage social interaction and safety within the communities. Suggestions were made on improving street infrastructure including pavements, around pedestrianisation of streets and improvement in outside spaces such as sitting areas and as well as children activity and play areas. Another respondent (1) specified the need for more green spaces in the city centre such as transport hubs (city trains stations) to project a more welcoming environment.

A number of respondents (4) highlighted the need for more reliable and affordable public transport in all areas in Cardiff. In particular, two respondents from North Cardiff highlighted their concern over access to public transport with one citing the specific need for accessible public transport in the area during the night-time.

Two (2) small business/ traders expressed the need for more parking spaces while a (1) remote worker further highlighted the need for 'ordinary/nondisabled', mix duration parking spaces that enable ease of parking outside the City centre.

Improvements in city planning were suggested by two (2) respondents who stated that development planning could adopt approaches used in 'more gentle development' in cities like Barcelona and Paris. Additionally, planning strategies should also encourage more diversity in the types of businesses in the city.

Broadband connectivity was highlighted as a key issue in certain locations in North Cardiff. A remote worker highlighted this need to enable more effective remote working at home and in other public spaces.

Finally, one (1) of the respondents highlighted the need for police officers to improve access and maintain safety in local and district centres. Another respondent suggested that local social events (1) could further improve access and footfall to the area. The same respondent further added that 'quicker response to community projects' would generate the same benefits.

Views on other impacts that 15-minute city concept on local and district centres

No impact	
Small business/ trader	None
Working remotely	None.
Working remotely	None
Small business/ trader	No
Working in a co-working workshop/studio	Too earlier to review
Lead to improvements in the local area	
Small business/ trader	Facility provision, bike transport links
Small business/ trader	it'll improve & encourage local diversity
Require improvements public transport provision	
Small business/ trader	All the villages in outskirts of Cardiff need better infrastructure, b**etter public and affordable public transport**, stop spending money on lowering the speed limits and invest in better bus services and train services
Working remotely (Rc)	sort out use of the city centre… and get TfW to pull its finger out with fixing the City Line connections

Working remotely (Rd)	Any changes within Cardiff's boundaries also need to be considered within the context of the Capital City Region and the **transport infrastructure for meeting with colleagues from across this wider region and not just within the City Boundar**y…+
Highlight and maintain and heritage and buildings	
Working remotely	Keep inner city like Grangetown etc area clean, create group who would look after appearances of private Victorian houses like, in Bath called Bath preservation society, could be same in Cardiff as inner city is part of history and when front if houses in good condition and when front of the houses painted in similar colours whole inner city is a big museum for international visitors....
Improve planning development	
Working remotely (Rc)	sort out use of the city centre - use the land and property better…+
Working remotely	Good luck and put your citizens before developers. (And don't hide behind planning law - advocate for change if you have to).
Working remotely	Concerned about Heol Isaf and Llantrisant road with number of houses being built.
Need to improve facilities and services for remote workers	
Working remotely (Rd)	…. Providing co-working spaces alone is not enough for me to use them, they need to be attractive, reliable, affordable and give sufficient confidentiality options for me to be able to use them as a Civil Servant working on secure matters.

Working remotely	This has clearly been designed by car users. The city is unsafe and frightening, and the Council doesn't seem to realise this.
Isolation and reinforce social divides	
Working remotely	15-minute cities (prisons) are an artificial construct that will fail and lead to a poorer experience for the residents as we will feel trapped in our neighbourhood. Covid taught us that people do not like to be trapped and utterly resent officialdom interfering in their lives.

A total of 15 respondents offered their views on the how the 15-minute city concept will impact on their local and district centre. Four (4) respondents believe that this will not have an impact while another felt that its' too early' to make a judgement about it.

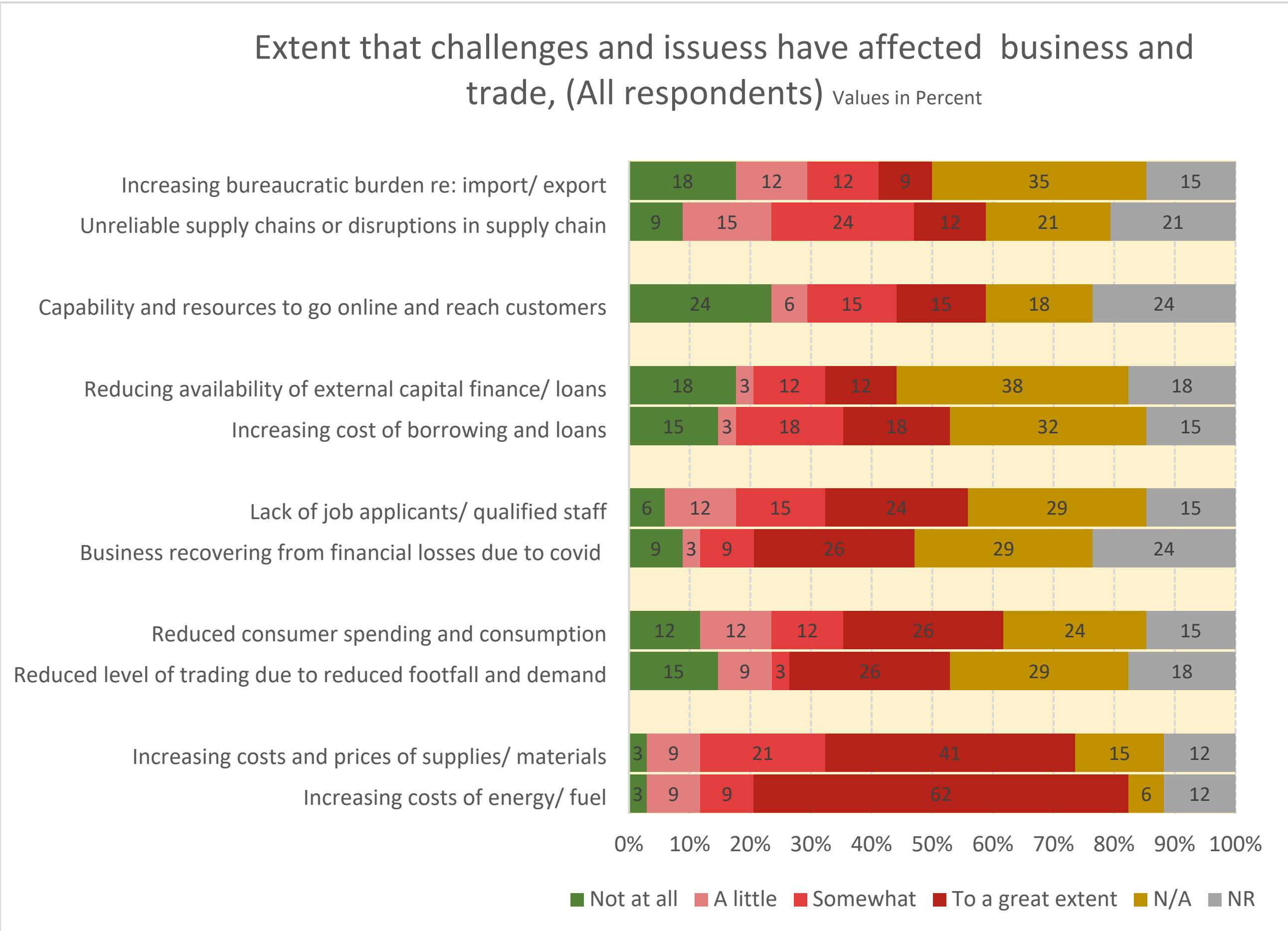
Two (2) small business/traders highlighted some positive impacts in improving facilities, mobility and transport links as well as diversity in local neighbourhood.

Several other respondents cited (7) various improvements that are needed to enhance mobility and the environment in local neighbourhood areas. Three (3) respondents highlighted the need to improve public transport provision and infrastructure as well as affordability. A respondent (1) suggested improving and maintaining Victorian properties in the inner city to highlight its cultural heritage. Some concerns over land use and development were cited by three (3) respondents. Suggestions were made on improving land and property use alongside putting the interest of citizens before developers. A respondent (1) expressed concern on the extent of housing development in Llantrisant road. Another respondent (1) highlighted the challenges around safety and dominance of car use in the City centre.

A respondent (1) cited specific suggestions on desirable features of co-working spaces that they could benefit from such as affordability, attractiveness, security and confidentiality were made.

One (1) respondent highlighted a possible negative impact of the 15-minute city concept in potentially limiting social interactions and further reinforcing social divides between neighbourhoods.

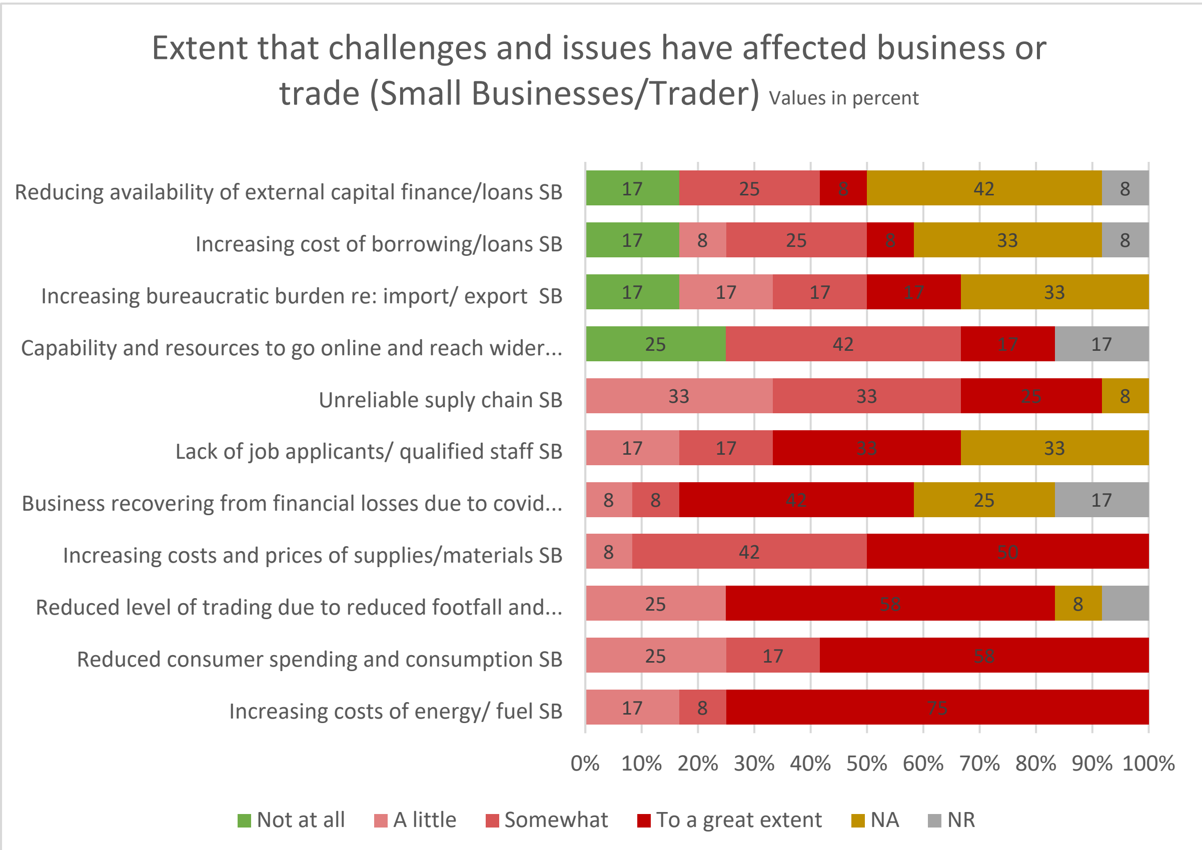
Views on challenges and issues affecting business and trade



The results above show that a substantial proportion of respondents experienced challenges and issues that have adversely affected their business and trade as a result of the covid pandemic and the cost-of-living crises.

In total, more than three quarters (80%) indicated that the increasing cost of energy and fuel as a key issue, with as many as two thirds (62%) confirming that has affected them 'to a great extent'. The increasing cost and prices of supplies and materials was also identified by the majority (71%) as another challenge they experienced.

More than half highlighted that their business/trade have also been affected by staffing issues (51%) and supply chain issues (51%). Reduced consumer spending (50%) and reduced level of trading due to lower footfall (38%) were also highlighted as having affected a substantial proportion of respondents.

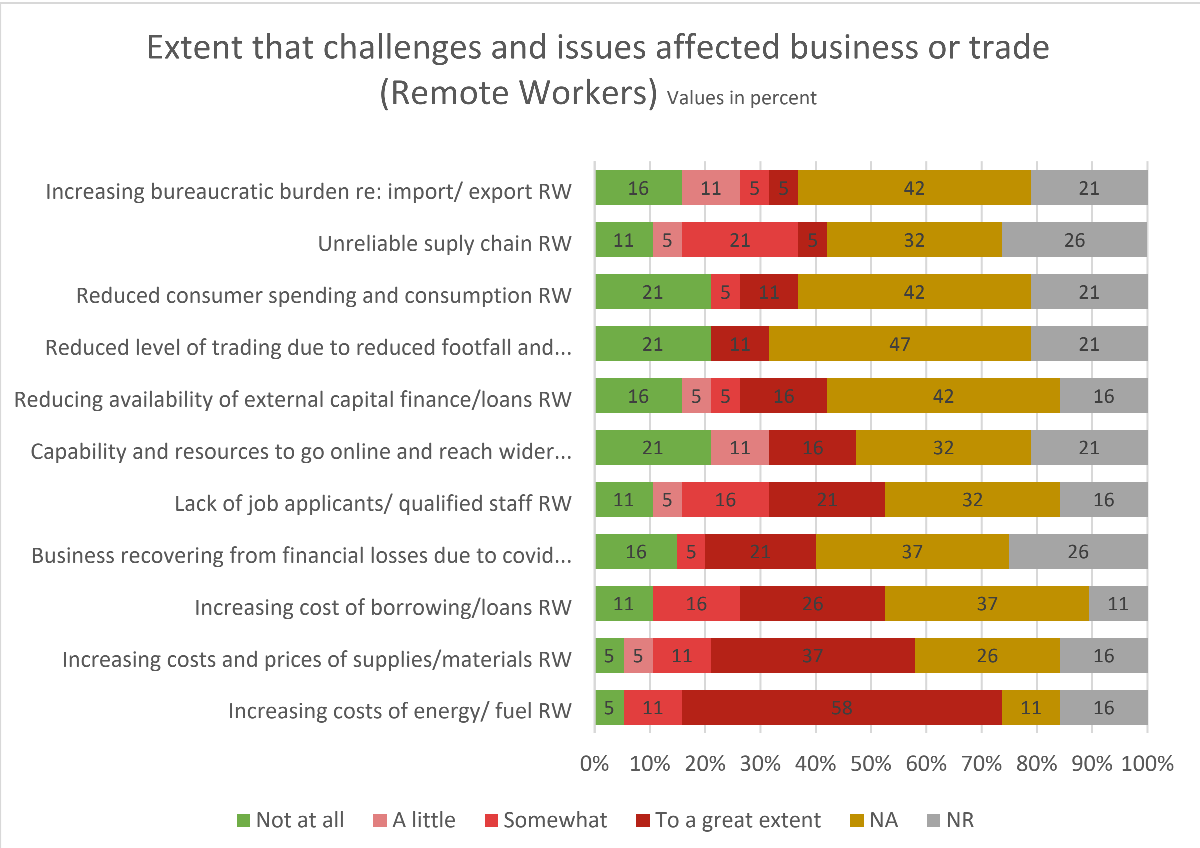


Extent that challenges and issues have affected business or trade (Small Businesses/Trader) Values in percent

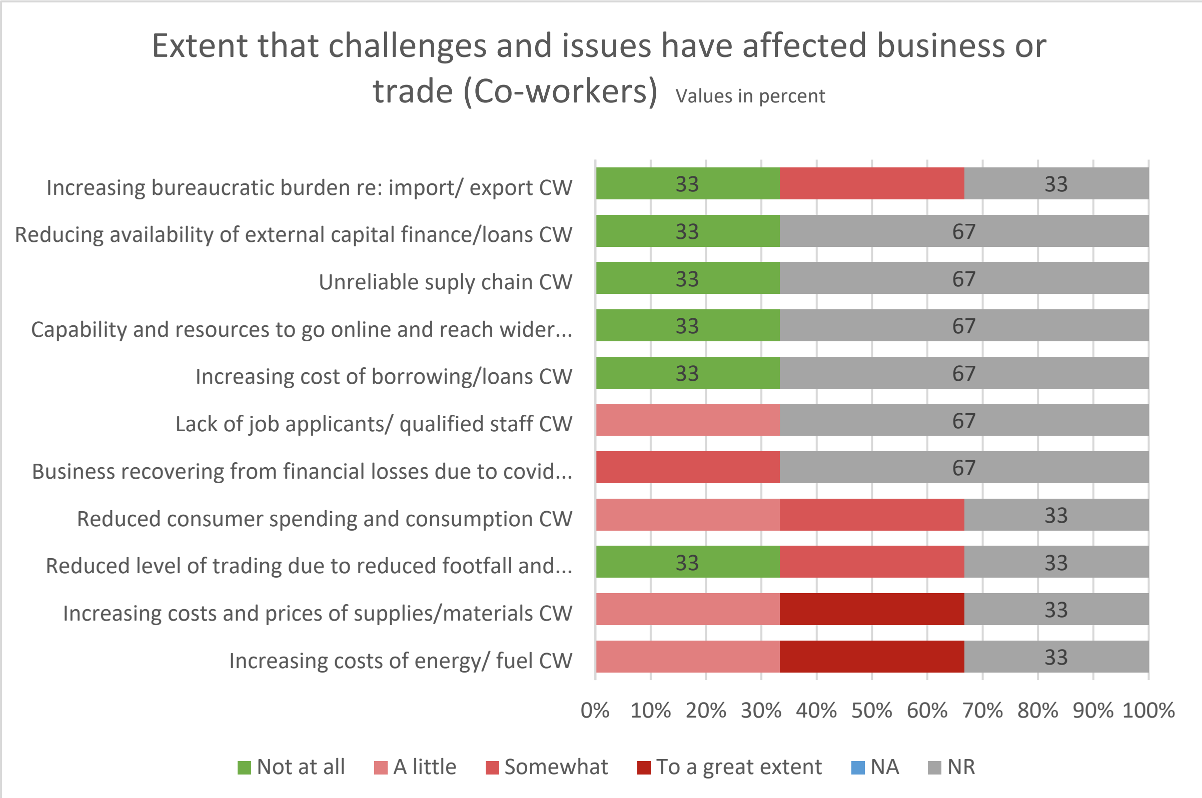
Amongst the small business respondents, the results show that the issues and challenges outlined above have affected them to differing extents.

All of small business/trader respondents (100%) indicated that the increasing costs of energy and fuel, reduced consumer spending, and increasing costs and prices of supplies and materials have adversely affected them. Half of these respondents, to as many as three quarters (in the range of 50% - 75%) confirmed that these issues have affected them 'to a great extent'.

Reduced trading due to reduced footfall was another key issue identified by the vast majority (in total 83%) as having affected their business or trade to different extents. Although more than half (59%) indicated that their capability and resources to go on-line have affected them, a quarter (25%) of them confirmed that this issue has not affected them at all.

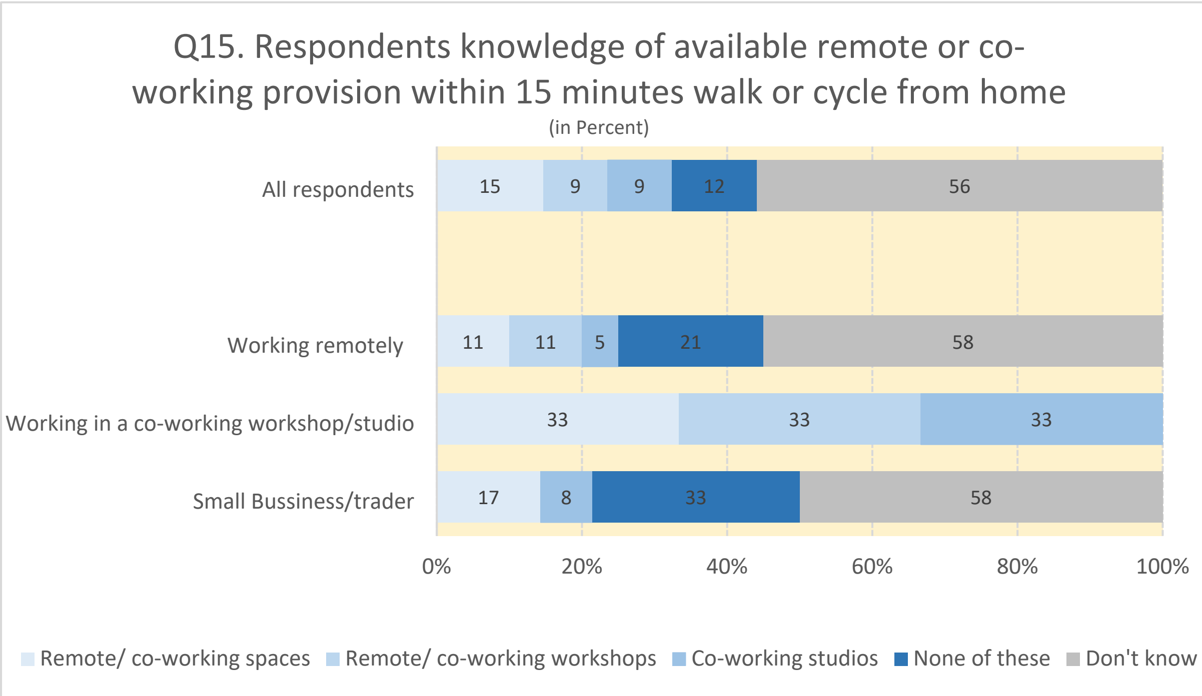


Amongst remote working respondents, the increasing costs of energy and fuel (69%) and the increasing costs and prices of supplies and materials (53%) were also identified as the key challenges and issues that have affected their work. The results also show that these issues have affected a slightly lower proportion of remote workers (53% -69%) compared to respondents representing small business (100%).



Co-worker respondents identified issues similar to those cited by small business and remote workers as 'somewhat' affecting them or affecting them 'to a great extent.' They cited 'increasing costs in energy and fuel' as well as 'increasing costs of supplies and materials' and reduced consumer spending and consumption' as they key issues that have affected most of them. It must be noted however that the number of respondents in this group is far too small to make any reliable comparisons with other respondent groups.

Knowledge of locally available remote or co-working spaces



Another issue amongst remote workers is their knowledge of locally available remote working spaces. The results above show that the majority of respondents (56%) are not aware of the various types of remote workspace provision that are available within 15 minutes' walk or cycle from their home. Only around a quarter of those working remotely (27%) and small businesses and traders (23%) confirmed knowledge of the various remote workspace provision.

Other challenges or issues affecting your business or trade

Parking	
Small business/ trader	Parking
Small business/ trader	City mobility and lack of local parking.
Small business/ trader	Parking issues in the area. Cars staying over 1hr limit having lots of complaints from customers who say they can't stop and shop
Cost of living and cost running a business	
Small business/ trader	Business rates, rents, bills
Small business/ trader	A landlord unsympathetic to the issues caused by COVID
Working remotely	Cost of living
Access to public transport	
Working remotely	Poor public transport - shocking bus service in Cardiff
Working remotely (Rx)	Lack of public transport to get into Cardiff Bay office when I do need to commute to the office for meetings…+
Limited facilities and local provision	

Working remotely (Rx)	…Lack of co-working spaces near my home limiting the choice to almost exclusively home-working. Limited space at home. Slow housing market preventing moving to larger home premises with dedicated office spaces (self and partner working for different businesses from home requiring privacy from each other) …+
Working remotely (Rx)	…Local businesses not open within Radyr to support my impulse purchases during the working day.
Less job opportunities for freelancers	
Working in a co-working workshop/studio	I work with charities - their donations have fallen substantially and therefore they are struggling to take on freelancers like me for project work.
Working remotely	Brexit has led to a reduction in funding from 2023.
Broadband issues	
Working remotely	Slow broadband connection
Community safety	
Working remotely	Issue of break ins in inner city is concern, drug addicts, unruly youth, car safety from damage.

Twelve respondents (12) identified other issues and challenges that have affected their business and trade following the covid pandemic. Access to local parking facilities was cited as a key issue by three (3) small business/trader respondents with one of them specifying that this had affected their customers' ability to shop in the area. Other issues that have affected small businesses according to two respondents are the cost of rents, business rates and bills and landlords being unsympathetic to small businesses regarding the impact of covid on their trade. One (1) of the remote working respondents have specified the current cost of living crises as a key challenge for them.

Two (2) remote working respondents expressed concern on their access to public transport and how this restricts their mobility around Cardiff. Other issues highlighted by this group include availability of 'local co-working spaces,' shops that provide essential goods and slow broadband connection locally. The post pandemic funding crises as well as Brexit were also cited by two freelancers whose ability to secure work had been affected.

One (1) remote working respondent highlighted issues relating to community safety challenges in the inner-city area in citing their concern for break ins, car damage, drug related issues and antisocial behaviours from young people.

Views on how the Council can provide support in recovering from the pandemic

Lower business rates	
Small business/ trader	Reduced Commercial Rates.
Small business/ trader (R1)	Freeze Business rates. *Promote* Rhiwbina
Small business/ trader	Reduce, fund for business rate. Energy bills
Business tenancy support and advice	
Small business/ trader	Be good to have some arbitration between tenants like us and our landlords, and also help figure out how to drive people back to the high street.
Lower council tax	
Working remotely	Keep taxes low so I can feed my family. Stop intruding in people's lives. Make my life simple again, stop trying to save the planet as it costs a fortune and up goes the council tax again.

Working remotely	Lower Council tax
Financial aid	
Working remotely	Financial aid for all, I'm not eligible for financial support but I need it
Working remotely	Supporting all residents with financial help not just those on benefits
More co-working spaces	
Working remotely	More co-working spaces in sub-urban locations (e.g., Station Road or Park Road Radyr), funding for community buildings (e.g., Old Church Rooms) to offer a safe, bookable at short notice and well equipped co-working option. Support for local businesses to be open to support those working remotely (lunch options or informal safe non-home meeting spaces)
Small business/ trader	Provision of shared working and collaboration spaces
Improved broadband connectivity	
Working remotely	Improve the broadband speed in Penrhos, Radyr.
Accessible green spaces in inner city	
Working remotely	Create more green spaces especially in the inner city so taking breaks is pleasant which in turns increases productivity
Better use of public money	
Working remotely	Stop Welsh water sewage works in Hailey Park wasting taxpayers' money fighting the general public.

Engagement with Charity groups	
Working remotely	Engage with the Charity sector to discuss options.
Promotion of local neighbourhood areas	
Small business/ trader (R1)	*Promote* Rhiwbina

When asked how the Council can provide support in recovering from the pandemic, 14 respondents identified various areas where they can benefit from some support. Three respondents (3) who represent small businesses/traders stated that they would welcome some reduction or the freezing of business rates and support for their energy bills. One (1) small business/trader respondent stated that they would benefit from some support in dealing with business tenancy issues with their landlords.

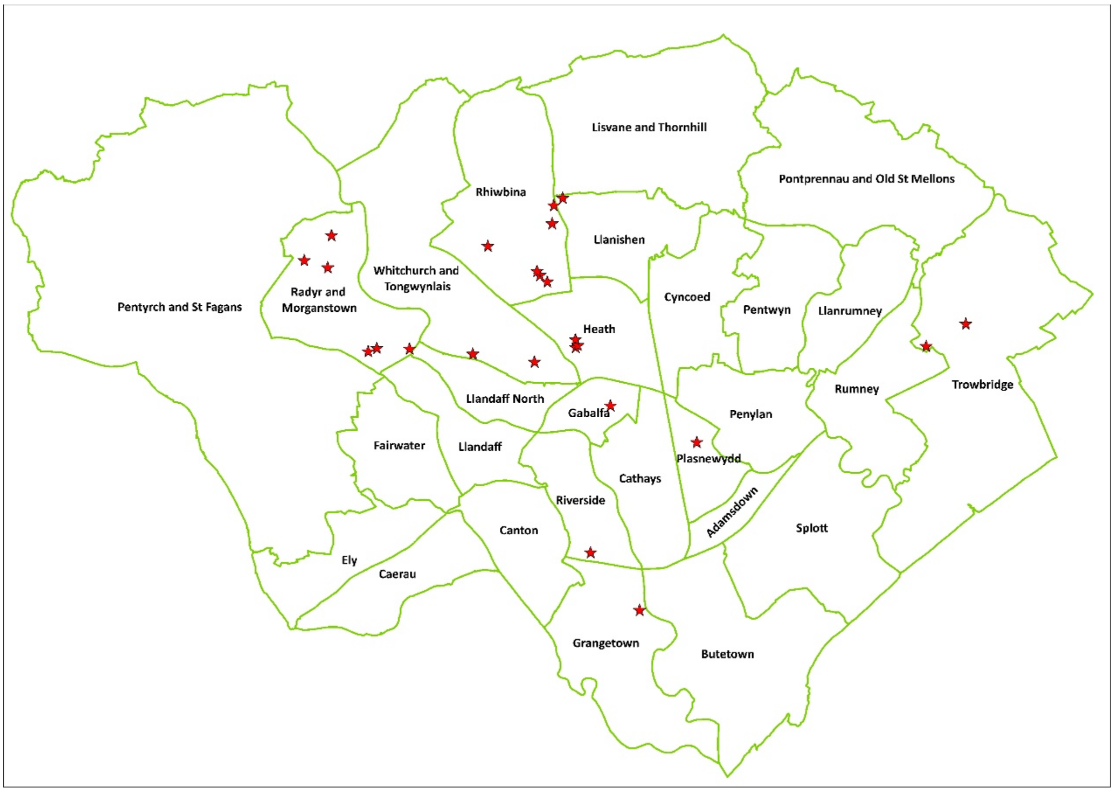
The lowering or keeping Council tax low (2 respondents) and receiving direct financial aid (2 respondents) were identified by remote working respondents as the types of support that they could benefit from.

Two (2) of the respondents stated that increasing provision for co-working and shared working spaces with one specifying that safe, well -equipped and bookable at short notice co-working provision, including catering/food facilities for remote workers would be welcome.

One (1) of the remote working respondents cited the need for improvements in broadband speeds in their neighbourhood area and another (1) highlighted the need and benefits that green spaces in inner city areas could provide to remote workers and its residents.

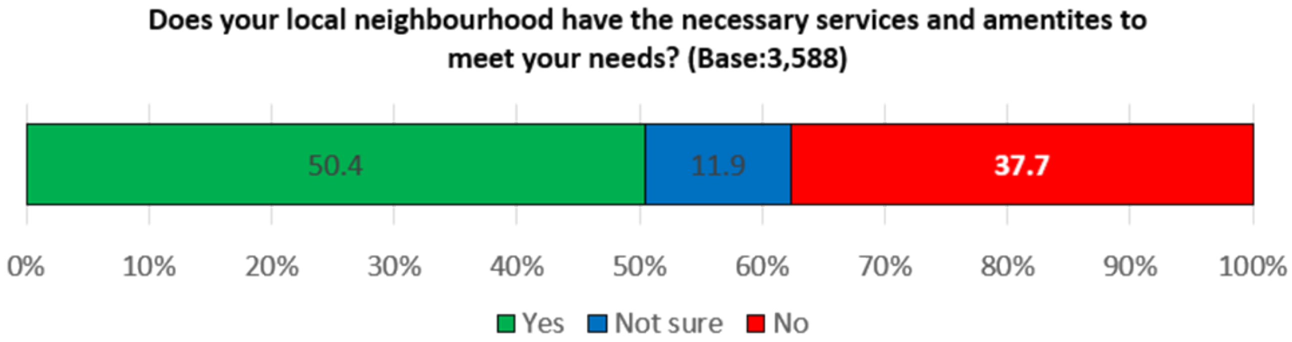
Other suggestions include (1) better use of public money, improved engagement with the Charity sector (1) and the promotion of local neighbourhood areas (1) such as Rhiwbina.

Appendix 1. Respondents to survey by Ward location



The map above illustrates the postcode locations of respondents who completed the survey.

Appendix 7 - Ask Cardiff Extract



Which of the following services and amenities are available within 15 minutes' walk or cycle from where you live?

	No.	%
Essential Food Shops/Groceries (fresh produce & essential groceries)	3,226	91.0
Pharmacy or Chemist	3,145	88.7
Parks and play areas	3,033	85.5
Schools	2,994	84.4
Doctor's Surgery	2,834	79.9
Pubs and/or evening dining/drinking facilities	2,799	78.9
Café and/or daytime dining facilities	2,620	73.9
Post Office/ Banking facility	2,611	73.6
Hub/ Library with communal facilities	2,355	66.4
Dental Surgery	1,874	52.8
Leisure or fitness facilities e.g., leisure centres or gym	1,651	46.6
Bookshops	672	19.0
Adult education provision	626	17.7
Remote or co- working office spaces	435	12.3
Co-working workshop spaces	256	7.2
Co-working artist studios	240	6.8
None of these	55	1.6
Total Respondents	3,546	-

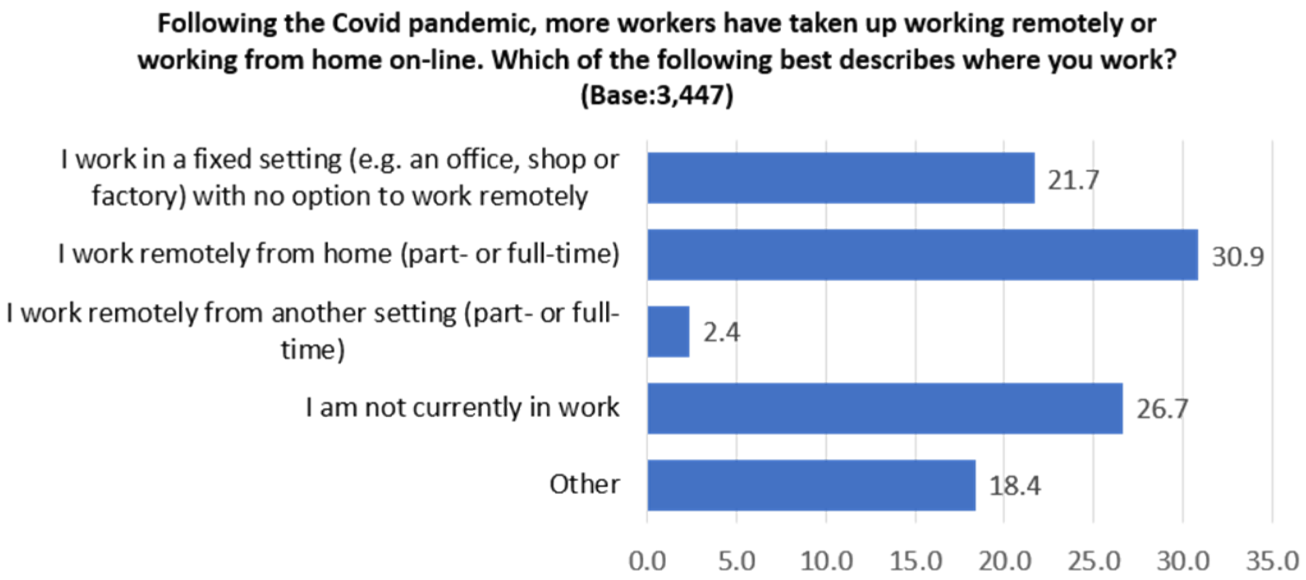
Are any of the following available to enable you to access your local neighbourhood services or amenities?

	No.	%
Frequent and reliable public transport provision (Bus and/or train services)	2,029	59.7
Car and/or other motorised vehicle parking spaces	1,714	50.4
Safe walking routes	1,642	48.3
Cardiff 'Ovo Bike' use	1,555	45.7

Safe cycling lanes and/ or routes	887	26.1
Disabled parking bays	822	24.2
Parking space for non-motorised vehicle e.g., bicycles, e-scooter	531	15.6
None of these	375	11.0
Total Respondents	3,401	-

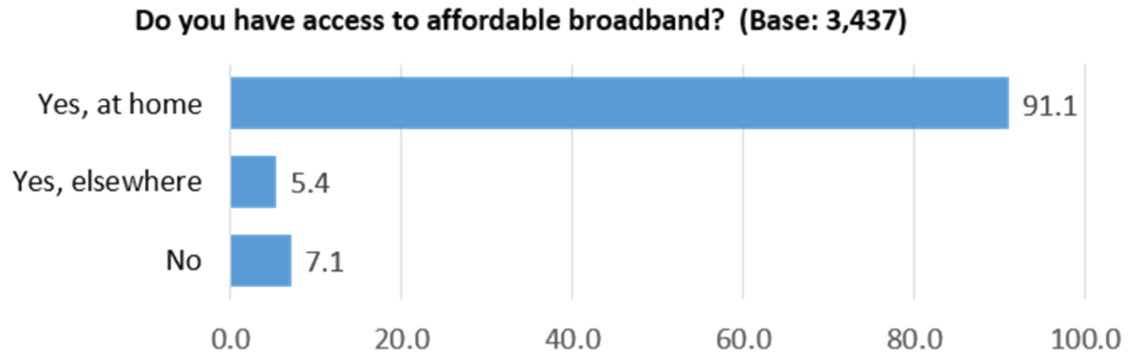
Are there any barriers to you accessing services or amenities in your local neighbourhood?

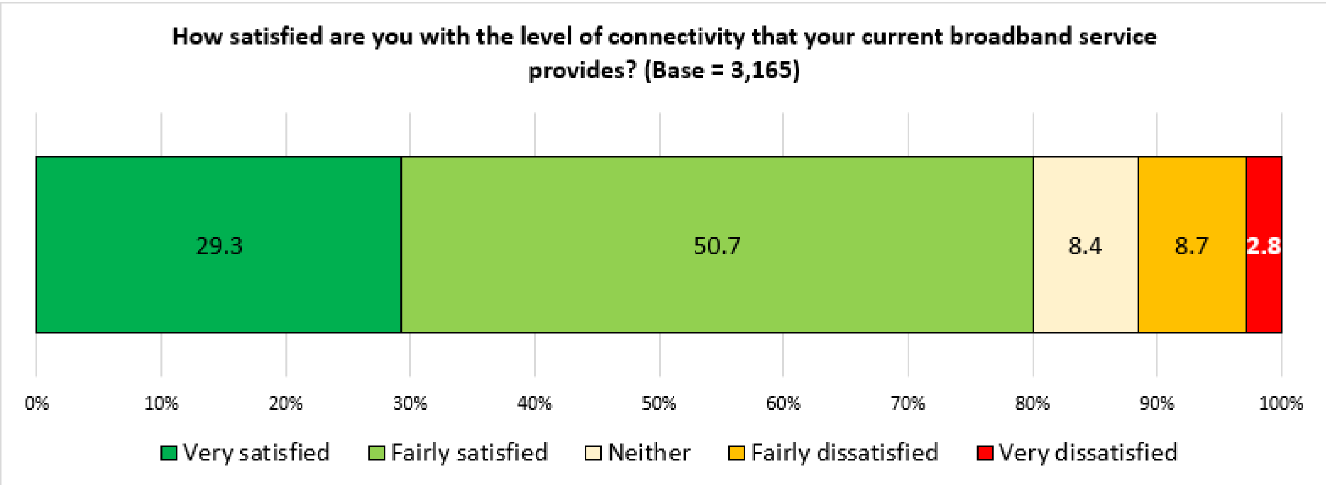
	No.	%
No barriers	964	30.3
Poor parking facilities	753	23.7
Some services are not available in my local neighbourhood	727	22.9
Not feeling safe in the local neighbourhood	598	18.8
Availability of safe and convenient cycle routes	557	17.5
Availability of safe and convenient walking routes	550	17.3
Services not available outside office hours	499	15.7
Physical disability	371	11.7
Local terrain – e.g., steep roads	281	8.8
Mental health and wellbeing	271	8.5
Caring responsibilities (looking after a child or adult with care needs full time)	170	5.3
I can't access services digitally	82	2.6
Housebound	36	1.1
Other	170	5.3
Total Respondents	3,180	-

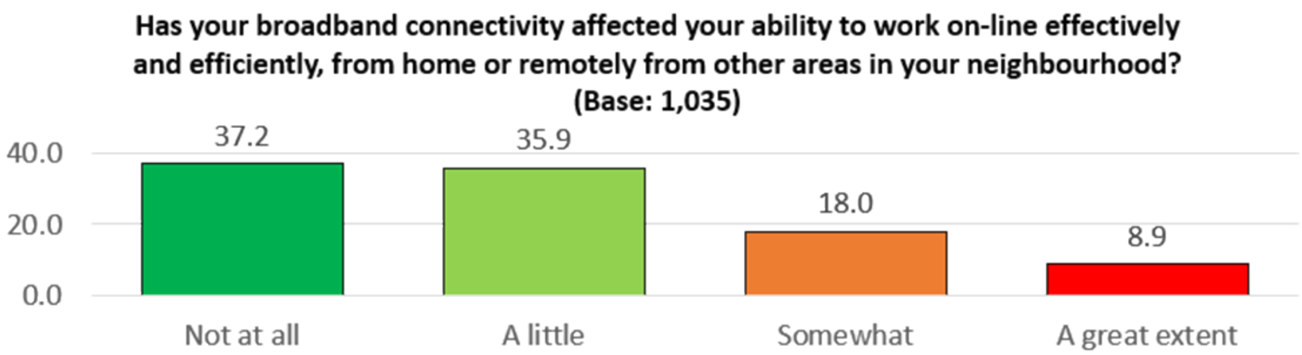


Are any of the following shared working spaces and facilities needed within 15 minutes' walk or cycle in your local neighbourhood?

	No.	%
Flexible co-working office spaces	181	16.1
Co-working artist studios	42	3.7
Co working workshops space	50	4.4
None of these	460	40.9
Don't know	461	40.9
Total Respondents	1,126	-







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