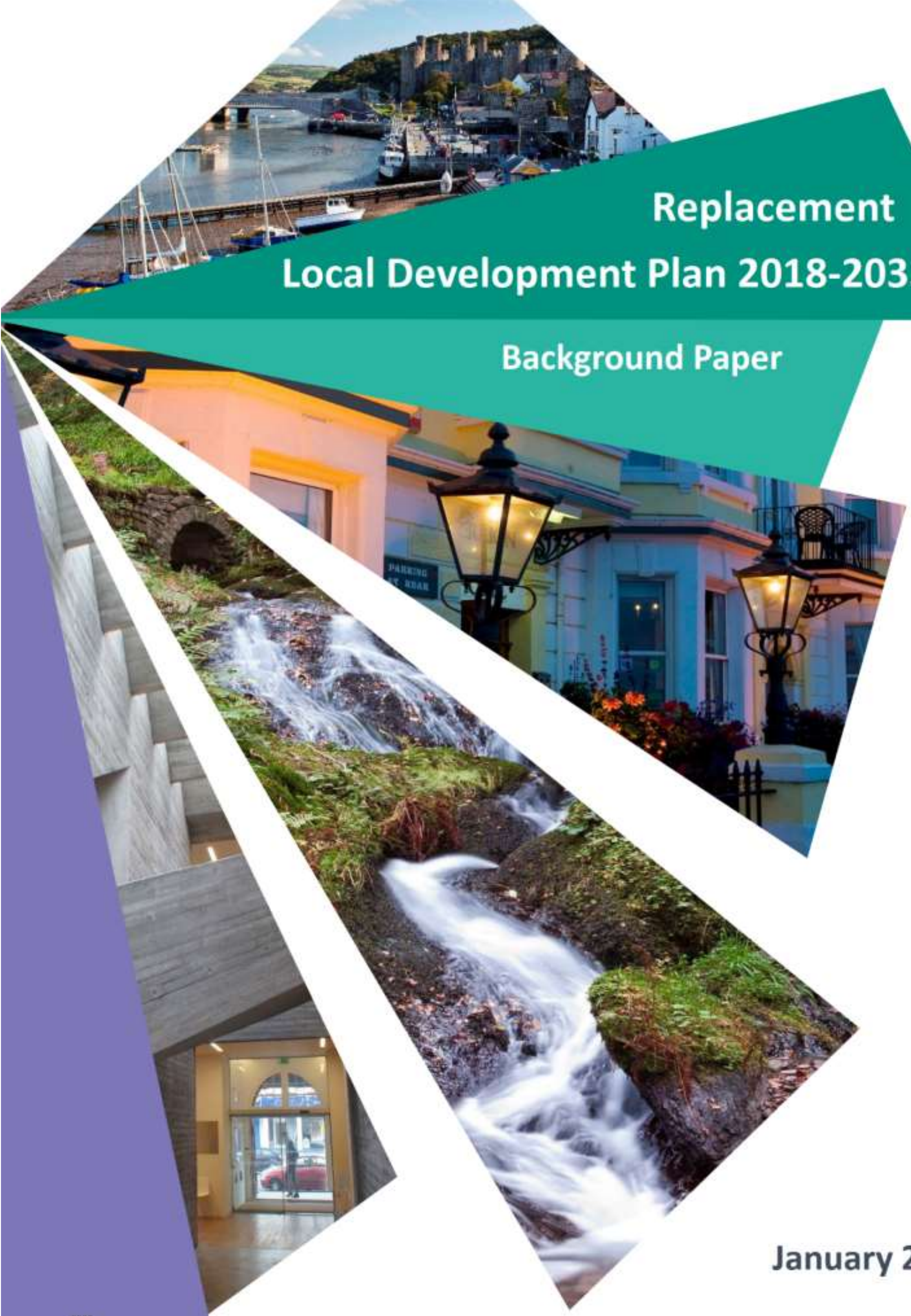

Replacement Local Development Plan 2018-2033

Background Paper

January 2023

BP 61: Town Centres First Study

CONWY
CYNGOR BWRDEISTREF SIROL
COUNTY BOROUGH COUNCIL

Mae'r ddogfen hon ar gael yn Gymraeg hefyd.

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Conwy Town Centres First Study

Final Report

Conwy County Borough Council

11 November 2022

LICHFIELDS

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Contents

1.0 Introduction

Background to the Project

1.1 The 2020 Conwy County Borough Employment Land Review [ELR] undertaken by Lichfields, concluded that the County Borough had a significant volume of office floorspace in its designated Town Centres (some of which was no longer fit for purpose). In response, Conwy County Borough Council [the Council] commissioned a Town Centres First Study [TCFS] (this study). The purpose of the TCFS is to assess this supply in more detail and to analyse its potential redevelopment for residential and other town centre uses. Understanding the potential impacts of the Covid-19 crisis are also key objectives of the TCFS. The TCFS will involve identifying key areas where conversion / redevelopment of property may be acceptable in principle, for example for residential / other uses. The TCFS focuses on the 13 main centres in the County Borough, namely Llandudno, Colwyn Bay, Abergele, Conwy, Llandudno Junction, Llanrwst, Craig-y-Don, Deganwy, Llanfairfechan, Old Colwyn, Penmaenmawr, Rhos-on-Sea and Kinmel Bay.

Methodology

1.2 The project has involved four main stages of work as follows:

- Stage 1: understanding and briefing;
- Stage 2: property market review;
- Stage 3: option identification and evaluation; and,
- Stage 4: study production and recommendations.

Stage 1 – Understanding and Briefing

1.3 A review of existing information prepared by the Council as part of the emerging Local Plan's evidence base was undertaken. Stage 1 also included audits and a SWOT analysis of the 13 main centres to help identify the broad scope of the potential implementable actions to maintain and enhance each centre. These audits included quantitative desk-based analysis, site visits, and surveys.

1.4 A household telephone survey was undertaken by NEMS Market Research with 400 completed interviews covering the hinterland of the main centres, broken down into the four zones.

Stage 2 – Property Market Review

1.5 Stage 2 was underpinned by a need assessment for town centre uses, which was updated and expanded to include retail, food/beverage and office uses. This analysis involved a benchmarking exercise highlighting the strengths and weaknesses of the current retail, food/beverage and office offer, including a qualitative analysis of the existing provision of commercial premises from the operators' perspective and identify potential barriers to success.

1.6 The 2020 ELR provided a reference point for the quantitative and qualitative need for office floorspace. Commercial agent input from an active local agent (Richard Baddeley) provides commentary on:

- whether the specific office units/cluster of sites remain fit for purpose;
- barriers to redevelopment;
- the strength of the commercial market; and,

- whether the conversion or redevelopment of those sites for alternative, non B-Class uses would be deliverable in the current economic climate.

1.7 In relation to residential uses, the deliverability of key sites and the existing housing evidence base was explored as part of Stage 2. The findings of the County Borough Retail Capacity Study 2018 have also been updated based on the latest population and expenditure projections.

Stage 3 - Option identification and evaluation

1.8 As part of Stage 3 we have engaged with stakeholders and held a presentation/workshop. An online Business Survey using Smart Survey has also gathered the views of key local businesses and stakeholder groups.

1.9 The future potential for change in each centre has been considered within the context of available opportunities for development and improvements. Each option identified has been assessed in terms of its likely suitability for different forms of investment. The assessment of potential opportunities has considered a wide range of physical and promotional issues. An assessment of existing centre boundaries and policy designations has been undertaken and potential alterations have been considered.

Stage 4 – Study production and recommendations

1.10 The findings of Stages 1 to 3 underpin the option evaluation and strategy formulation. These are brought together in Stage 4 to establish a strategy which outlines recommendations relating to spatial planning policies suitable for inclusion in development plan documents and regeneration objectives for each centre.

Report Structure

1.11 This TCFS report is structured as follows:

1 Background Policy Context - sets out the Welsh and local planning policy context along with relevant evidence base documents for the County Borough;

2 Current Provision and Trends, including key drivers and future office working patterns;

3 The Need for Office Uses;

4 The Need for Retail and Food / Beverage Uses;

5 The Need for Other Town Centre Uses;

6 13 Town Centre Audits and SWOT analyses;

7 Facilitating Change – including commentary on floorspace requirements, Co-Working Office hub opportunities and other potential improvements;

8 Opportunity sites and option development;

9 Planning Policy Interventions including recommendations on the centre hierarchies, impact thresholds, review of town centre boundaries, appropriate mix of uses and identification of future development opportunities and interventions; and,

10 Conclusions and Recommendations.

2.0 Policy Context

National Planning Policy

Planning Policy Wales

2.1 National Planning Policy can be found in Planning Policy Wales [PPW] (11th Edition, February 2021). The document sets out the planning policies of the Welsh Government. The primary objective of PPW is to ensure that the planning system contributes towards the delivery of sustainable development and improves the social, economic, environmental and cultural well-being of Wales.

2.2 Placemaking lies at the heart of PPW and PPW promotes the development of Place Plans, non-statutory documents prepared at the initiation of the local community. Place Plans are a powerful tool to promote collaborative action to improve well-being and placemaking.

2.3 Regarding previously developed land, paragraph 3.5.5 states:

"Planning authorities should work with landowners to ensure that suitably located previously developed sites are brought forward for development and to secure a coherent approach to their development. To incentivise the appropriate re-use of previously developed land, planning authorities should take a lead by considering and identifying the specific interventions from the public and/or private sector necessary to assist in its delivery."

2.4 On the use of Compulsory Purchase Powers, paragraph 3.5.7 states:

"Planning Authorities are encouraged to take appropriate steps to unlock the development potential of sites. In some instances, the authority may need to purchase land in order to facilitate development, redevelopment or improvements. Wherever possible this should be with the agreement of the landowner. Where such agreements cannot be reached, planning authorities should consider using the full range of powers available to them. This should include, where necessary, us of compulsory purchase powers to bring land and/or buildings forward for meeting development needs in their area and/or to secure better development outcomes where a compelling case in the public interest can be demonstrated which outweighs the loss of private interests."

2.5 PPW outlines that Local service centres should be designated by local authorities as the preferred locations for most new development including housing and employment provision. Pp. 4.3.2 states:

"Retail and commercial centres should be identified in development plans and include established city, town, district, local, village and neighbourhood centres, which provide a range of shopping, commercial and leisure opportunities as well as places of employment, education, civic identity and social interaction. Opportunities to live in these centres, combined with their good public transport links, make them the most sustainable places."

2.6 On retail and commercial centres, paragraph 4.3.5 to 4.3.6 states:

"Planning authorities should establish through their development plan a clear strategy for retail development, supported by policies, to achieve vibrant, attractive and viable retail and commercial centres. The strategy and policies should set out a framework for the future of retail and commercial centres in their area, taking in to account strategies in adjoining authorities, to promote a successful retailing sector supporting existing and new communities."

2.7 PPW promotes establishing a hierarchy of retail and commercial centres taking account of the size, scale, form and function of commercial centres. When considering locations for new retail and commercial provision, a qualitative assessment should consider both positive and negative aspects and may be an important consideration where it:

- supports the objectives and retail strategy of an adopted development plan or the policies in this guidance;
- is highly accessible by walking, cycling or public transport;
- contributes to a substantial reduction in car journeys;
- contributes to the co-location of facilities in existing retail and commercial centres;
- significantly contributes to the vibrancy, attractiveness and viability of such a centre;
- assists in the alleviation of over-trading of, or traffic congestion surrounding, existing local comparable stores;
- addresses locally defined deficiencies in provision in terms of quality and quantity, including that which would serve new residential developments; or where it; and,
- alleviates a lack of convenience goods provision in a disadvantaged area.

2.8 PPW further states that first preference should be to locate new retail and commercial development within a retail and commercial centre designated in the development place hierarchy of centres.

2.9 On the enabling vibrancy of centres, PPW states that:

"Achieving diversity of uses and activities may require a flexible approach to planning. Where the right balance of use and activity is not being achieved, planning authorities should consider making changes to the acceptable uses in primary or secondary areas, or the retail and commercial centre boundaries themselves."

Building Better Places: The Planning System Delivering Resilient and Brighter Futures Recovery (July 2020)

2.10 *Building Better Places: The Planning System Delivering Resilient and Brighter Futures recovery* was published in July 2020. This document sets out the Welsh Government's planning policy priorities to assist in taking action in the recovery period after the Covid-19 pandemic crisis. It seeks to ensure that the planning system remains centre stage in the consideration of built and natural environment issues that have arisen from this situation.

2.11 In this paper the Welsh Government highlights the key existing planning policies and tools which should be used by all sectors in the environmental, social, cultural and economic recovery of Wales, recognising the continuing need for Planners to operate within a wider context of priorities and action at all scales.

2.12 PPW contains policy statements from the Welsh Government on a variety of planning issues and topics; which remain relevant and should be considered as a whole by local planning authorities and the development sectors. However, in the immediate post Covid-19 phase there will be particular areas of policy which should be the focus of consideration and action, in order to act as a catalyst for a recovery across the pillars of sustainable development.

2.13 PPW demonstrates that policy areas work more effectively when they are considered together in order to get the maximum benefit. We have therefore identified key issues which bring individual policy areas together to ensure that action is the most effective. The 8 issues are:

- *Staying local: creating neighbourhoods;*
- *Active travel: exercise and rediscovered transport methods;*
- *Revitalising our town centres;*
- *Digital places – the lockdown lifeline;*
- *Changing working practices: our future need for employment land;*
- *Reawakening Wales' tourism and cultural sectors;*
- *Green infrastructure, health and well-being and ecological resilience; and,*
- *Improving air quality and soundscapes for better health and well-being*

2.14 Each issue draws out the pertinent points of PPW with commentary on specific aspects of the potential post Covid-19 pandemic situation. Whilst most of these issues have some relevance for economic growth, of particular relevance to this ELR Update is clearly "*Changing working practices: our future need for employment land*".

2.15 In this regard, the Welsh Government notes that workplaces have undergone a seismic shift during the Covid-19 lockdown with a significant increase in people working from home, particularly in the office-based sectors of the economy. Even when all restrictions are lifted, the impacts of this are likely to have longer term impacts on where we work. People and organisations are becoming familiar with flexible working and the potential benefits and savings (as well as the positive impacts on decarbonisation and reducing unnecessary travel) it can bring. This in turn is likely to have impacts on the requirements for future workspace and there is potential for significant surplus existing stock.

2.16 This all happening in the wider context of the economic impact of the pandemic and Brexit which will have an effect on all industrial and employment sectors:

"*The planning system will need to adapt quickly to the economic changes which will occur as a result of the pandemic which could largely accelerate trends which had already begun to occur. **Economic forecasts will need to be re-examined to ensure that the supply of land for employment uses is adequate and fit for the future**, taking into account the need for a choice of sites*." [page 20, Lichfields' emphasis]

2.17 The document also requires that employment allocations are reviewed in light of these changes and, where change is needed, this should be to the best use of land for placemaking. This may mean sites in urban areas with good public and active travel links being designated for other mixed uses. It may also mean surplus unsustainable sites are removed from development plans altogether. In this regard it is noted that:

"*On strategic employment sites, LPAs should continue to assess if these are still needed or how needs may change, and work collaboratively across a region to designate land if there is a realistic prospect of it being developed in the medium-term.*

With the rise of homeworking, we will also need to think differently about the flexible workplaces we provide for remote workers to congregate together for the sharing of ideas and access to office environments and facilities. Our retail and town centres are best suited to this and they will be a means of reinforcing the vibrancy of these hubs (see above). This will require innovation by developers and planning authorities, including the identification of suitable sites and buildings in the heart of communities where they can be accessed in a sustainable way." [page 20]

Future Wales – The National Plan 2040

2.18 This plan, previously known as the National Development Framework [NDF], provides a strategy for addressing key national priorities through the planning system. The plan covers big issues including the economy, housing and environment. It shows where nationally significant developments like energy, transport, water and waste projects should take place. It also shows where growth should happen, what infrastructure and services are needed and how Wales can help fight climate change. It tries to make the best use of resources, create accessible healthy communities and protect the environment.

National Development Framework 2020-2040 Explanatory Paper – The Spatial Strategy (December 2019)

2.19 During the consultation on the draft NDF, some stakeholders suggested further details should be made available setting out how the NDF had been prepared. To assist stakeholders the Welsh Government produced a collection of explanatory papers to set out the evidence that supports the Draft NDF, which included one on the Spatial Strategy itself.

2.20 This document explained how the spatial strategy of the Draft NDF was developed, highlighting how the policies support the strategy. The Paper sets out that in choosing where to focus development, the Welsh Government recognised that Wales has established centres of population and work. They include data on where people live and work, the density of population and employment and the transport infrastructure used to move people and goods. The location of environmental and landscape designated areas was also built into the process. Where information and plans for future development of national significance was available it contributed to the development of the spatial strategy. The Metro schemes in south-east Wales, north-east Wales and Swansea Bay were important considerations and were key factors in the identification of the National Growth Areas.

2.21 The Draft NDF recognises the importance of supporting and encouraging sustainable development in rural areas. This policy highlights the need for growth and development in rural areas, at a scale that is appropriate to the area. This is best determined at the regional and local level but the Draft NDF recognises the significance of rural Wales as an economic resource and as a home to a significant number of people in Wales. The supporting text highlights sectors that offer key opportunities to develop high-value employment to help maintain and develop a vibrant and prosperous rural population.

2.22 The Paper sets out that the coastal towns of north Wales are regional growth areas and should be a focus for development in Local Development Plans. The identified towns are split in two clusters; Caernarfon and Bangor in the west; Llandudno, Colwyn Bay, Rhyl and Prestatyn in the east. These are important service towns to the rural hinterland of North Wales.

National Development Framework 2020-2040 Explanatory Paper – The Regions (December 2019)

2.23 This Explanatory Paper was prepared to assist readers of the Draft NDF in understanding the reasoning behind the regional footprint within the Draft NDF, highlighting the key evidence that informed the regional footprint.

2.24 The Draft NDF has identified regions because there is a legislative basis for regional planning, established in the Planning (Wales) Act 2015, which made provisions for strategic development plans covering more than one local authority area. By setting a regional footprint and proposing broad spatial strategies and policies for each region the Draft NDF sought to provide leadership and impetus for progress on establishing a regional tier of planning.

2.25 The study aggregated the various options derived from each of the well-being goals resulting in footprints which had an inherent problem of splitting the County across two regions. To reach final recommendations, therefore, further considerations were added. The Draft NDF adopted the Economic Action Plan's 3-region model to ensure alignment with the broader emphasis within the Welsh Government towards regional working. The County was included within the North Wales region alongside the Isle of Anglesey, Gwynedd, Denbighshire, Flintshire and Wrexham.

National Development Framework 2020-2040 Explanatory Paper – Rural Areas (December 2019)

2.26 This Explanatory Paper was prepared to assist readers of the Draft NDF in understanding how the Draft NDF seeks to address rural issues across Wales, highlighting the key evidence that has informed the rural elements of the plan.

2.27 The Draft NDF seeks to create vibrant rural places with access to homes, jobs and services. The Draft NDF recognises rural areas are diverse, with both prosperous and deprived communities, with distinctive histories and cultures. The Draft NDF also recognises there are many challenges facing rural areas including climate change, economy, housing, services, population movement and the Welsh language. Brexit is also a major issue going forward as both agricultural funding and regeneration programmes are areas of major public policy which have been shaped by wider European policies and funding.

2.28 The Draft NDF identifies 11 outcomes which are a collective statement of where the Welsh Government wants to be in 2040. Outcomes are overarching ambitions based on Planning Policy Wales's national planning principles and national sustainable placemaking outcomes. All 11 NDF outcomes apply to rural areas.

2.29 This includes the Draft NDF visualising a rural Wales where people live and work in connected, inclusive and healthy places, and in vibrant rural places with access to homes, jobs and services. The Draft NDF also recognises the challenges facing the rural economy and that the planning system should respond by supporting rural communities and appropriate new development and diversification. The Draft NDF aims to secure growth in housing and the economy, to maintain and improve access to services, and retain and attract working age population.

2.30 The Draft NDF identifies regional growth areas within which regional centres should be supported as focal points of activity. Strong rural economies support stable and resilient communities and reduce the reliance on a small number of larger economic centres. Priority should be given to economic activities with strong links to rural areas, such as foundation economy activities like food and drink processing, and tourism and leisure, and energy generation, the environmental economy and businesses ancillary to farming, forestry and other rural economic activities. The improved provision of broadband in rural Wales supports an increasingly diverse business base (NDF p.29).

2.31 Development plans should support the needs of their rural communities with strong and ambitious policies. Where growth is identified it should be proportionate to the communities and local areas needs and be evidenced through the development plan. The Draft NDF recognises the challenges facing the rural economy and that the planning system should respond by supporting appropriate new development and diversification.

2.32 The draft NDF has sought to identify Wales' cities and large towns as the main growth and development areas. Outside of these areas, proportionate growth of towns and villages in rural areas will be supported where it meets local needs and compliments growth in larger cities and towns. The Draft NDF identifies regional growth areas outside of the large urban clusters where such development should be focussed, this includes settlements which serve largely rural areas.

2.33 Regarding the Rural Economy, the Paper notes that a strong rural economy is essential to support sustainable and vibrant rural communities. New enterprises and the expansion of existing business support growth and stability in rural areas. Local Planning Authorities [LPAs] should allocate new rural sites for economic development in development plans. Development sites, with the exception of rural diversification and agricultural development to which separate criteria apply, should generally be located within or adjacent to settlement boundaries, preferably where there is public transport provision. An absence of allocated employment sites should not prevent proposals for small-scale enterprises in or adjoining small rural settlements. Criteria based policy in development plans should be used to assess such proposals.

Commercial Property: Market Analysis and Potential Interventions - A report to the Welsh Government

2.34 This document, produced on behalf of the Welsh Government in March 2020, sets out an analysis of the Welsh commercial property market, including current and likely demand, property market responses and the extent to which there is a gap in supply. It also considers potential priorities for, and approaches to, intervention, by region.

2.35 The report was produced just before the Covid-19 lockdown and predicted that the immediate UK outlook for economy was one of modest growth, subdued in the light of Brexit uncertainty. However, growth was expected to strengthen over the medium term. The report notes that employment growth over the twenty years has been much stronger in 'office' sectors (public and commercial services) than in manufacturing and logistics. The consequence of this is that office demand is apparently quite high, and industrial demand appears weak, especially taking a longer-term view.

2.36 The report considers that not all demand for new office and industrial space will be accompanied by net employment growth. Some demand will be derived from the obsolescence of existing stock (i.e. the need for new premises to meet business need, without additional job creation), or by changes in working and consumer preferences.

2.37 The report states that in Conwy the office market is quite small with rents generally around £8 psf (rising to £11psf at the Penrhos Manor managed workspace scheme). Agents reported some excess capacity driven by a loss of public sector demand following the Welsh Government's move to a purpose-built regional headquarters facility at Llandudno Junction.

2.38 Agents considered that there is likely to be demand for smaller (up to 5,000 sq ft) and medium (10-15,000 sq ft) sized units across much of western and rural North Wales, if they could be enabled to come forward.

2.39 A number of potential intervention avenues are set out in the report that the public sector could take to bring forward development where the market is unable to act alone including Asset-backed Development Vehicles.

2.40 Annex C sets out SQW's approach to estimating potential B-class demand and, building on this, their approach to identifying the potential quantitative 'need' for intervention by the Welsh Government or other public sector partners. By using past trends (Business Register and Employment Survey [BRES] and Labour Force Survey data for the years 2009-18 and 1996-18), the report suggests a need for 38,000 sqm of office floorspace and 11,700 sqm industrial using the BRES historical trend, and 25,200 sqm office floorspace and -8,100 sqm industrial floorspace using the Workforce Jobs-based historical trend.

2.41 Potential priorities for North Wales are set out as follows:

Table 7-3: Potential priorities for intervention

Theme	Locations and issues
Offices	
1. City centre and strategic hub offices	There is no real evidence of demand at present, with agents sceptical of the prospects for new Grade A development.
2. Office-based managed workspace and grow-on space	As elsewhere, evidence of demand for workspace on flexible terms. Potentially focused on larger centres where demand less likely to be met by the market (e.g. Bangor, Colwyn Bay).
Industrial	
3. Industrial 'starter' units	There is evidence (from the data and from stakeholders with a knowledge of the market) that there is a weak supply of smaller units (industrial and hybrid), relative to **demand**. This is compounded by ageing stock, but delivery is unviable across much of the region. In terms of **policy**, this is a universal infrastructure offer which helps to broaden the choice to the market. Potentially several **locations**, although focused outside of Wrexham and Flintshire where there has been some recent private sector activity.
4. Industrial grow-on space	In terms of **demand**, there is limited stock in the 5,000 – 15,000 sq ft category across the region, and evidence that restricted opportunities to move constrains firms to their existing premises – compounding the challenges in relation to Theme 3. Potentially several **locations** although likely focused on the network of larger strategic sites.
5. Strategic industrial sites	While new investment demand is unpredictable, there is interest from local partners in bringing forward a network of sites for investment, and the North Wales Economic Ambition Board has proposed a joint venture agreement to bring forward a series of priority sites. However, market commentary notes caution in terms of the risk of market over-supply.
Cross-cutting	
6. Refurbishment	Responds to the **risk** of disinvestment as a result of high refurbishment/ renewal costs (or the **potential** to repurpose existing stock for alternative use. In **policy** terms, responds to environmental and resource efficiency drivers and improves the investment attractiveness of key business locations. Potentially focused on existing estates, outside of Flintshire and Wrexham

2.42 A subsequent **Supplementary Note** was produced by SQW in June 2020 in the light of the Covid-19 crisis. It reported that sectors that generate demand for B-Class space are likely to be somewhat more resilient than the economy overall, at least in the short term. The brunt of the immediate impact has been borne by 'shutdown' sectors, such as hospitality, tourism, leisure and arts and non-food retail, with more modest losses of output in traditionally office-based sectors such as finance and insurance, professional services and IT. However, the scale of the downturn could lead to structural changes in the Welsh economy.

2.43 Potential impacts on the office market could include:

a Experience of homeworking could accelerate a trend towards more remote working and flexible use of office space; and,

b There could be opportunities for flexible workplaces, closer to home.

2.44 Potential impacts on the industrial market could include:

a Industrial demand may be less impacted by the crisis itself;

b Over the longer term, 'reshoring' could impact positively on demand; and,

c However, disruption and uncertainty could further reduce the prospects of a growth in supply without intervention.

2.45 Overall, the central rationale for Welsh Government intervention in the commercial property market remains strong and is likely to be reinforced by the current crisis, especially in conditions of widespread uncertainty. The report concludes that there could be fundamental changes to office demand, both in the type of floorspace and preferred locations, which will need to be thought through.

Local Planning Policy

Conwy Local Development Plan 2007-2022

2.46 The Council's Conwy Local Development Plan [LDP] was adopted in October 2013 and sets out the vision for the Borough from 2007 to 2022. The vision for the Plan is that by 2022, the communities of Conwy will be more sustainable, offer a higher quality of life and be supported by a more balanced age structure. It goes on to state that through the promotion of an Urban Development Strategy Area, the sustainable and accessible urban coastal belt settlements of Abergele, Colwyn Bay, Conwy, Llandudno and Llandudno Junction will have become the economic, social and cultural focus of the LDP area.

2.47 LDP Spatial Objective SO6 is to:

"Develop vibrant town centre destinations for shopping, business and commerce, culture, entertainment and leisure through the protection and enhancement of the vitality, viability and attractiveness of Llandudno as the strategic sub regional retail centre, and regeneration of Colwyn Bay town centre and other key shopping centres".

2.48 Policy DP/8 sets out the Colwyn Bay Urban Regeneration Masterplan. This requires regeneration proposals in Colwyn Bay to be concentrated within the Colwyn Bay Masterplan [CBMP] area as shown on the proposals map. Key Proposals and interventions will be supported which assist a number of Colwyn Bay urban regeneration objectives including (inter alia):

"….

c) Increases connectivity to the waterfront, east-west links between the town centre, East Colwyn and Eirias Park and along Abergele Road in line with Strategic Policy STR/1;

d) Provides for new town centre retail and commercial development in line with Strategic Policies CFS/1 and STR/1…

…h) Provides for improved development of the Bay View Shopping Centre and its connectivity with the surrounding town centre in line with Strategic Policies CFS/1 and STR/1;

i) Creates a new focus for the town centre."

2.49 The LDP includes several priority issues relating to regeneration and affordable housing and how it impacts on the plan area. These priority issues include:

*"**Tackling Deprived Areas**: Colwyn Bay has experienced a significant decline in the tourism industry. There is a need to promote the comprehensive regeneration and renaissance of Colwyn Bay to broaden economic activity, address social exclusion, reduce deprivation, and limiting and reducing Houses in Multiple Occupation (HMO) through the Strategic Regeneration Area Initiative and the Colwyn Bay Masterplan."*

2.50 Strategic Policy HOU/1 '*Meeting the Housing Need'* states that over the plan period the Council will plan and manage the delivery of approximately 6,520 new dwellings at an average annual rate of 478 dwellings per annum [dpa]. This is inclusive of completions, commitments, windfall and new allocations and a contingency level of up to approximately 7,170 dwellings.

2.51 Policy EMP/4 – safeguards B1, B2 and B8 office and industrial sites states that:

"1) Existing B1, B2 & B8 office and industrial employment sites as designated on the Proposals Map, are safeguarded for the purposes of B1, B2 and B8 uses only. Development that would lead to the loss of existing B1, B2 & B8 employment sites on designated land will not be permitted. Proposals for changes of use between the B1, B2 & B8 use classes on existing designated land will be permitted provided the proposed development does not prejudice the strategic employment land requirement, is compatible with the amenity of occupiers of neighbouring properties and the environment in general, and subject to being acceptable in terms of other Local Development Plan Policies.

2. Proposals which would lead to a loss of B1, B2 & B8 employment land or buildings not falling within a designated or allocated area, as shown on the Proposals Map, will only be supported in exceptional circumstances where the development is acceptable in terms of other Local Development Plan policies and provided:

a) The site has no reasonable prospect of it becoming marketable for B1, B2 and B8 employment development or;

b) The site is incompatible with the surrounding area for B1, B2 & B8 employment uses and an alternative land use would benefit the surrounding area and community;

In either of these cases the applicant must also demonstrate that the non-employment use;

c) Would be compatible with neighbouring employment uses and;

d) Will respect the character and amenity of the surrounding area and is landscaped accordingly."

2.52 Strategic Policy CFS/1 'Community Facilities and Services' states that the Council will protect and, where possible, enhance community facilities and services by:

"a) Protecting and enhancing the vitality, attractiveness and viability of the retail centres in the Plan Area by locating appropriate retail developments in line with Policy CFS/2 – 'Retail Hierarchy';

b) Applying a sequential approach in determining proposals for new retail development in the Plan Area in terms of site selection and the availability of suitable alternative sites in line with Policy DP/6 – 'National Planning Policy and Guidance';

c) Protecting the retail offer in Llandudno, and the town centres, by designating primary shopping areas and/or shopping zones in line with Policies CFS/3 – 'Primary Shopping Areas' and CFS/4 – 'Shopping Zones';

d) Protecting the retail centre of Llandudno by designating Parc Llandudno and Mostyn Champneys as retail parks where large format retailing will be concentrated and safeguarded in line with Policy CFS/5 – 'Retail Parks'…"

2.53 The retail hierarchy is summarised in Policy CFS/2, with the position of a shopping centre in the retail hierarchy generally determining the level of new shopping provision. The larger the centre, the more likely it will be able to support new development. These are summarised as follows:

Sub-Regional Centre:

- Llandudno

Town Centres:

- Colwyn Bay
- Abergele
- Conwy
- Llandudno Junction
- Llanfairfechan
- Llanrwst
- Penmaenmawr

District Centres:

- Colwyn Bay West End
- Craig-y-Don
- Kinmel Bay
- Old Colwyn
- Rhos on Sea

2.54 Deganwy, along with 23 others, is identified as a Local/Village Centre.

2.55 Primary Shopping Areas [PSA] are designated in Policy CFS/3 in Llandudno and Colwyn Bay. The policy states that changes of use of the ground floor of premises in these areas from class A1 shops to other uses will only be permitted where it can be shown that:

- the premises are no longer needed for A1 usage and the retention of A1 use at the premises have been fully explored, without success, by way of marketing at a reasonable market rate for a minimum of six months; an,
- where the proposed change of use does not have an unacceptable impact on the retail function or attractiveness of the PSA.

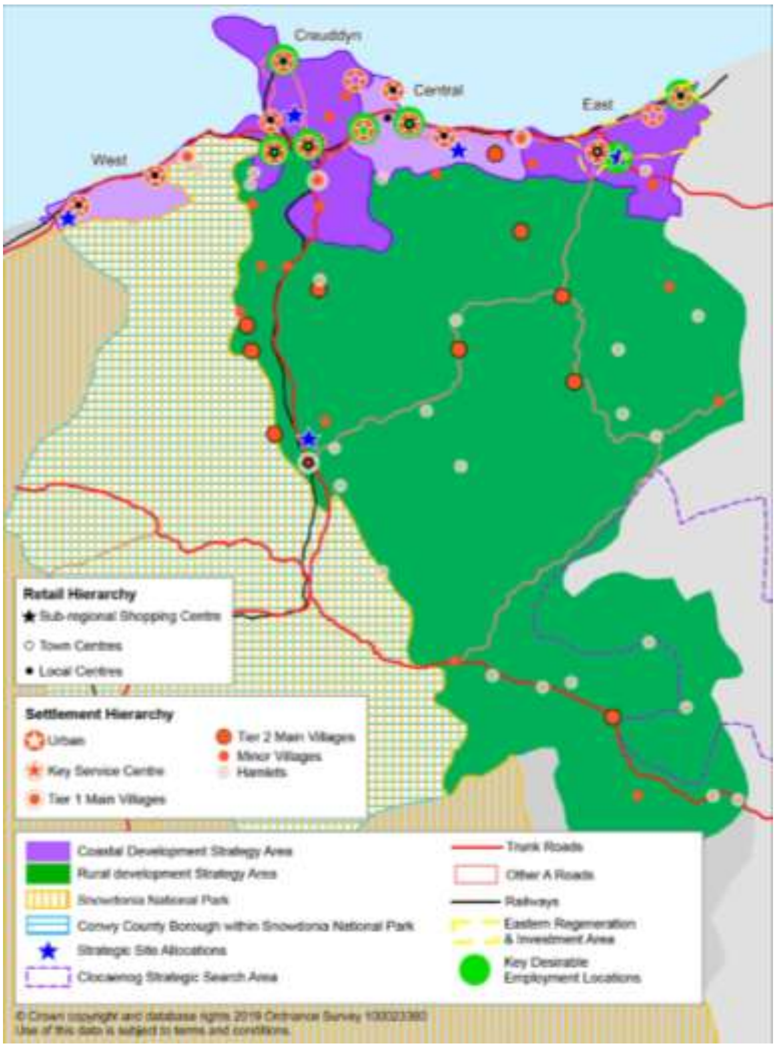
2.56 The LDP also designates Shopping Zones in Llandudno, Colwyn Bay, Abergele, Conwy, Llandudno Junction, Llanfairfechan, Llanrwst and Penmaenmawr in Policy CFS/4. Changes of use of the ground floor of premises in these areas from class A1 shops to other uses will only be permitted where the proposed change of use maintains or enhances the vitality, attractiveness and viability of the shopping centre and complies with the Development Principles.

Conwy Replacement Local Development Plan – Preferred Strategy

2.57 The Council is now preparing a Replacement Local Development Plan [RLDP] to cover the period 2018 - 2033. A Preferred Strategy RLDP was produced in July 2019 which set out the Council's vision, issues and objectives. The Council also set out its preferred levels of housing and jobs growth and where they should be located. The Council consulted on this document between 29th July 2019 and 20th September 2019. The relevant emerging policies as set out in the RLDP Preferred Strategy are summarised below:

2.58 The Preferred Strategy proposes to focus growth within the two strategic areas, the Coastal Development Strategy Area [CDSA] and the Rural Development Strategy Area [RDSA]. The Key Diagram, setting out the settlement hierarchy, is reproduced in Figure 2.1 below.

Figure 2.1 RLDP Key Diagram



Source: CCBC (July 2019): Conwy Replacement Local Development Plan – Preferred Strategy

2.59 The RLDP states that Llandudno Town Centre will not accommodate any further major convenience or comparison retail up to 2028, but will be protected and, where possible, enhanced. This is to seek to ensure a balanced and mix of uses in the centre that sustain the activity throughout the day and evening. The intention is that the tourism and accommodation offer within Llandudno is protected, enhanced and further diversified towards all year-round tourism. Llandudno will see the effects of the changes in shopping habits, in particular, the comparison offer [paragraph 2.41].

2.60 The Plan also states that new convenience and comparison retailing will also be promoted in Colwyn Bay to meet the needs of the Conwy Retail Study.

2.61 A slightly modified Retail Hierarchy has been produced for the RLDP, which moves Llanfairfechan and Penmaenmawr down from 'Town Centres' to 'Local Centres', whilst all the former 'District Centres' are now designated as 'Local Centres'. Deganwy and Old Colwyn have been moved up to this third tier, whilst Craig-y-Don has been redesignated as a Local Centre.

Table 3.1 RLDP Retail Hierarchy

	Centre
Sub-Regional Shopping Centre	Llandudno
Town Centres	Abergele Colwyn Bay Conwy Llandudno Junction Llanrwst
Local Centres	Craig-y-Don Deganwy Kinmel Bay Llanfairfechan Old Colwyn Penmaenmawr Rhos on Sea West End (Colwyn Bay)

Source: CCBC (July 2019): Conwy Replacement Local Development Plan – Preferred Strategy

2.62 Strategic Policy 16 (SP/16) 'Retail' states that retail and commercial centres in Conwy will be the hubs of social and economic activity and the focal point for a diverse range of services which support the needs of local communities. This will be encouraged by:

a *"Establishing a hierarchy for retail centres, which will guide the location of new retail development;*

b *Allocated land for retail use to meet identified need set out in the Conwy Retail Study;*

c *Providing criteria-based policies for new retail proposals on unallocated sites and for changes of use in town centres;*

d *Designating Primary Shopping Area and Shopping Zone boundaries;*

e *Encouraging the retention of retail facilities outside of the Sub-Regional and Town Centres will be encouraged;*

f *Safeguarding the specific retail function of Parc Llandudno and Mostyn Champneys Retail Parks and the leisure function of Llandudno Junction Leisure Park*

g *Encouraging high quality Shopping Street Frontages and Shop Front Security."*

2.63 The supporting text to this policy states that proposals for retail development will be considered in accordance with this hierarchy. Llandudno, as a Sub-Regional Shopping Centre is the favoured location for new retail development, followed by the Town Centres and then the Local Centres. Any retail proposals outside of these centres will be assessed using a criteria-based policy.

2.64 The supporting text goes on to note that new development in the retail centres will need to be in keeping with the scale and function of that centre and have regard to the centre's position in the hierarchy. Proposals for uses appropriate for a town centre, as defined in PPW para 4.3.21, will need to adopt a sequential approach to development, giving preference to sites in the centre of the Sub-Regional and Town Centres, followed by edge-of-centre sites, and then the Local Centres [paragraph 4.4.4].

2.65 The RLDP refers to the Conwy Retail Capacity Study which identifies a need for further convenience / comparison retail development during the RLDP period. The following need is required by area:

- Conwy East 35,000 sq ft (3,252m2)
- Conwy Central 20,000 sq ft (1,858m2) 25,000 sq ft (2,323m2)
- Conwy North 5,000 sq ft (465m2)
- Conwy West 10,000 sq ft (929m2)
- Conwy South 15,000 sq ft (1,394m2)

2.66 This need was previously met through the permission granted on the Brickworks site for a retail superstore. This permission expired in May 2019 and has not been renewed. The need identified in the west area of the County Borough has been met by the new Lidl development currently underway in Llandudno Junction. The RLDP states that new allocations will be required in the other areas to meet this identified need. These will be identified at Deposit stage. The location of these allocations will be guided by the sequential approach and the RLDP retail hierarchy. The floorspace proposed on these sites will be flexible, as required by PPW para 4.3.22, to ensure that changing retail demand and opportunity can be accommodated for.

2.67 The RLDP states that boundaries for Primary Shopping Areas and Shopping Zones in the Sub-Regional Centre and Town Centres will be detailed at a future Deposit stage. It goes on to advise that proposals for a change of use in these designated areas will be subject to a criteria-based policy, which will ensure their vibrancy, viability and attractiveness.

2.68 The RLDP refers to paragraphs 4.3.30-32 of PPW which encourages a mix of uses to deliver vibrant, viable and attractive retail centres, as A1 uses are only part of what secures a centre's vibrancy:

"Primary Shopping Areas and Shopping Zones will be reviewed and published in Background Paper 27 at Deposit RLDP stage. These will reflect national guidance, where primary areas contain a high proportion of A1 retail uses, and secondary areas a mix of uses. Policies will be included at Deposit stage, which will guide the type of uses that will be considered acceptable in these areas." [paragraph 4.4.11]

2.69 In terms of economic development, *Strategic Policy 27 (SP/27) 'Economic Development' of the RDLP* states that:

"In order to assist with the delivery of predicted economic growth for the County, the LDP will provide between 12-14 hectares of employment land on a split of 50% B1 office uses and 50% B1c/B2/B8 uses. A criteria-based policy will seek to safeguard existing B class employment sites where they are needed to ensure adequate supply of employment land in the right locations, as guided by the Conwy Commercial Market Analysis."

2.70 The RLDP refers to the 2019 ELR which provided a range of economic growth scenarios up to 2033. The second of these scenarios in the ELR, titled 'Policy On' (also Growth Option 4 in the Growth Options Paper) has been selected by the Council as the preferred option. This concludes that Conwy would need to accommodate in the region of an additional 1,800 jobs over the RLDP Period which equates to around 12-14 hectares of employment land for B-class uses.

2.71 Currently in quantitative terms there is 13.32 ha of employment land supply, which means an additional 0.68 ha of new land will need to be allocated in the Deposit RLDP to allow for choice of location and type as per the Commercial Market Analysis. The supporting text to the Policy states the following:

"Designated and existing B1, B2, B8 employment sites (subject to criteria) will be safeguarded from other uses unless it can be demonstrated that there is no longer demand for the current use. Indeed, smarter use of existing office floorspace will be advocated where stock is no longer in demand for traditional B1 use in line with the Conwy Commercial Market Analysis. While there is a need to protect B1, B2, B8 employment land where it is required, it is also recognised that other uses such as D1 clinics, A2 financial services and certain leisure and sui generis uses can have employment generating potential. Where it is deemed that a B class use is no longer needed, other uses may be acceptable subject to a criteria-based policy." [paragraph 6.2.16]

Perfectly Placed for Business and Growth: Conwy County's Economic Growth Strategy 2017-2027

2.72 The Council's Economic Growth Strategy [EGS] was issued in 2017 and sets out 6 cross-cutting themes and 5 key ambitions that inform the County's approach to securing economic growth. The cross-cutting themes relevant to this study include:

- Employment, skills and apprenticeships: growing the size and capability of the workforce;
- Transformational tourism: making Conwy a truly international, year-round destination; and,
- Making the Conwy pound work harder: making sure that more of the money that is generated in Conwy is spent in Conwy.

2.73 The first of the 5 key ambitions is to create state-of-the art business premises to support growth and attract new companies. In the EGS the Council identifies the need to create high-quality office premises in Town Centres to support and accelerate the increasing trend of people moving into the County Borough to start businesses; facilitate the growth of the digital and creative sectors; and support ongoing regeneration programmes.

2.74 The second ambition of the EGS seeks to capitalise on the economic boosts arising from head office functions, including the uplift in skills and Gross Value Added [GVA], as well as the potential for linkages with education providers and improved retention of younger talent:

"Quality head office businesses can also help develop close linkages with higher education and graduate opportunities, retaining young talent in the county. Conwy suffers from an outward migration of younger talent seeking graduate entry jobs. The establishment of head offices in the county would provide these opportunities and help reduce this exodus of talent from the county."

2.75 The fourth key ambition is "*To develop the night time economy and a winter tourism offer across the County Borough making Conwy a year-round visitor destination*." In the EGS, the Council sets out its ambition to capitalise on the wide range of conference and business bookings throughout the year by ensuring that as many of these as possible result in overnight stays. This includes developing a broader visitor offer during the evenings, including offering more places that are open to eat. Further to this is the ambition to increase the number of visitors throughout winter months by developing new events and attractions:

"Core to attracting more visitors through these months will be programmes to invest in attractor events at this time of year and developing/investing in attractions which can be enjoyed through the winter. This would encourage more accommodation to be available at this time, contributing to the overall ambition of generating £1billion p.a. from tourism."

2.76 The EGS states that Conwy's economy is dominated by the service sector which includes tourism, accommodation, care, public sector and retail, accounting for 89.7% of jobs in the county. This means that around 41% of Conwy's jobs are part-time. Conwy also boasts a thriving entrepreneurial culture with levels of self-employment and business start-ups increasing year on year, as well as the highest business survival rates in North Wales, exceeding Wales and GB averages; clear evidence that Conwy is a great place to establish a business.

2.77 Regeneration is highlighted as an economic challenge within Conwy. Whilst Conwy County's tourism sector is strong and growing, its historic legacy of large guest houses serving a strong domestic tourism market up until the 1960s and 70s has driven a private sector housing market in the coastal communities that became dominated by houses in multiple occupation. Coupled with lower wage levels within the service sector, it has resulted in concentrated pockets of deprivation close to town centres with a decline in the economic fortunes of these centres.

2.78 The EGS notes that Colwyn Bay has benefitted from a focussed and integrated regeneration programme, 'Bay Life', since 2009. This programme reinvested in the town's tourism and leisure infrastructure, its housing stock, its town centre and its people through the integration of regeneration and Communities First programmes. The Council's new investment in office accommodation within the town centre signalled a step change in the commercial potential of the town and reinforces the town's role as a commercial and service centre at the heart of North Wales.

2.79 Similar regeneration interventions are being aligned with place planning initiatives in towns such as Abergele and Llanrwst. Although both towns have very different opportunities, both need to manage their regeneration potential in light of significant housing allocations set to expand their population. It is a clear objective within the EGS that these town centres become vibrant once again, providing a balance of retail, leisure and service delivery, and a quality place in which to live, work and visit.

2.80 Further to this, the EGS notes that creating high-quality office premises in town centres would support and accelerate this trend, support the growth of the digital and creative sectors, and aid regeneration programmes by acting as a catalyst for further private sector investment and infrastructure developments.

Evidence Base Documents

Conwy Commercial Property Market Analysis (June 2018)

2.81 Following the 2016 Employment Land Review [ELR], the Council commissioned Lichfields to undertake further work in the form of a Commercial Property Market Assessment. This work focussed on analysing the local commercial property market to understand the epicentres and characteristics of employment land demand in Conwy County Borough.

2.82 The main conclusions of the report are as follows:

- The County is dominated by industrial (factory and warehousing) uses, although over time this has decreased whilst the level of office stock has increased.
- A large proportion of the County's B-class properties are situated in the urbanised areas along the coast and the A55 corridor.

- Agents have seen more enquires coming from businesses wanting to be in out-of-town business parks due to accessibility to the A55, good car parking facilities and better-quality premises.
- Few businesses are keen on town centre locations unless they are near public transport services and car parking facilities.
- Agents report a gap in supply for modern industrial units, particularly in the 2,000 sqm to 5,000 sq. ft. size bracket suitable for B1c, B2 and B8 uses.
- The office market in Conwy is relatively small and indigenous, lacking the critical mass to attract larger office occupiers.
- Much of the town centre / urbanised stock tends to be old and often of a poor quality or configuration. As a result, the demand that does exist for these units tends to be indigenous in nature.
- In terms of the vacant office spaces, there may be scope for some office buildings to be used for alternative uses. This should be used to facilitate the provision of office space that better reflects market demands.

Conwy County Borough Employment Land Review - Covid-19 Update (October 2020)

2.83 Lichfields was commissioned by the Council to prepare an update to the ELR that Lichfields produced on the Council's behalf in March 2019. That report, which was itself an update to a previous ELR undertaken by Lichfields in 2017, was intended to fully align with the ongoing LDP work being undertaken by the Council. The 2017 ELR Update incorporated an extension to the LDP period (to 2018-2033) and provided the objectively assessed need for B-Class employment land over the new plan period, having regard to recent planning policy documents and the latest data releases.

2.84 In light of the Covid-19 pandemic, and the uncertainties surrounding the consequences of Brexit, Lichfields was asked to revisit and update the 2019 ELR Update, factoring in our understanding of the local impacts of the pandemic and an analysis of the latest econometric forecasts.

2.85 The report noted that the pandemic hit Conwy County Borough's leisure, recreation, retail and hospitality sectors very hard and that the recovery of these sectors is uncertain. It showed that the latest 2018-based population projections are more optimistic than the previous 2014-based iteration, but still suggest that the County will have a rapidly ageing population and a declining labour supply. However, the report also noted a number of reasons for optimism, such as the County Borough's highly attractive natural environment continuing to encourage successful individuals to move to the area and the district's large base of smaller businesses meaning space requirements are more flexible.

2.86 The report concluded that **between 14 and 20 ha** (gross) of B-Class space would be needed over the period 2018 to 2033, based upon both demand and supply led scenarios, as well as a scenario considering past delivery of B-Class employment land. This is a slightly narrower range than the 12 -21 ha projected previously and reflects the slightly more optimistic job projections aligned with a weakening level of employment land take up.

2.87 To ensure a flexible and responsive policy framework, the report recommended that rather than just to focussing on meeting forecast quantitative requirements (which will fluctuate over time), the Council should think about the opportunities and risks that flow from particular policy approaches. The ELR indicates might concern how delivery can be prioritised in some locations or for some types of employment uses, or how scope can be created for meeting as yet undefined inward investment opportunities, but also not protecting legacy employment sites for which there is no longer a productive employment use. Planning for employment will need to be balanced against pressures from other land uses, as well as other Local Plan objectives such as planned housing, retail and leisure growth. B-class employment space also competes with non B-class uses, some of which may also generate local economic benefits or have identified needs that should be supported.

2.88 The ELR recommended a split of B-Class land uses of 35% B1a/b office, and 65% B1c/B2/B8. This is based upon the forecast employment changes over the period to 2031, changes to the existing stock in recent years, and analysis of enquiries recorded by the Council. When identifying the employment land delivery target for the County, it was also suggested that the Council should consider the high employment density of office space compared to industrial or warehousing space.

Conwy Skills Needs Assessment (March 2019)

2.89 The Council appointed Lichfields to undertake a Skills Needs Assessment for the County in 2018. This followed on from earlier studies also undertaken by Lichfields, including an ELR and Growth Drivers Study. The report examined the skills needs likely to arise from the key growth sectors and development projects identified in the 2019 ELR update, with a particular focus on how these align with the Higher Education [HE] courses currently available in the sub-region and whether new courses and HE facilities could be justified in Conwy. These key sectors include:

1. Energy & Environment;
2. Advanced Materials & Manufacturing;
3. Construction;
4. Creative & Digital;
5. Health & Social Care;
6. Tourism & Hospitality; and,
7. Food & Drink.

The report appraised the skills requirements of a number of sectors relevant to this study.

Its conclusions are summarised below under the key headings.

Creative & Digital

2.90 That the Creative and Digital sector is an innovation growth employer in Conwy and North Wales and has been identified by the Council and Welsh Government as a priority sector. This sector generally has a highly qualified and 'footloose' workforce.

2.91 Conwy County has experienced a significant increase in employment levels within the Creative and Digital sector compared to North Wales and Wales. This demonstrates the potential to further build on an existing strong workforce base in the sector.

2.92 That the Council should promote the alternative lifestyle that can be offered by County as an attractive place to live - to attract a high qualified workforce that are mobile.

Health and Social Care

2.93 That the Health and Social Care sector in Conwy and North Wales comprises of a range of multidisciplinary sub-sectors including health via NHS and staff within the Betsi Cadwaladr

University Health Board [BCUHB]; social care via local authorities; and private health services such as dentists, opticians and other health / social outlets.

2.94 There is also a high turnover across Conwy and North Wales of individuals (at all skill levels) within the wider sector – including a shortage of GPs, nurses, and professional care workers.

2.95 It is considered that as opposed to a new HE facility for this key growth sector, the Council should work with key stakeholders in supporting appropriate skills development to aid retention and recruitment of additional qualified support staff.

Tourism and Hospitality

2.96 That Conwy has a very strong Tourism and Hospitality sector. However, the Council must continue to work with local businesses to promote this sector throughout the year, as seasonal employment still remains the backbone of the sector.

2.97 Problems are focused more on staffing shortages within the sector rather than a lack of courses across North Wales. It is unlikely that an additional HE facility in Conwy would solve the current staffing problems facing the tourism sector. That more information about career pathways may be an appropriate proactive approach in tackling the workforce shortage issue.

BP22 Conwy County Tourism Assessment (March 2020)

2.98 The Conwy County Tourism Assessment reported 2018 STEAM data which suggested that over 9 million people visited the county in 2018 with an economic impact of over £900 million that is supporting almost 12,000 jobs either directly or indirectly. The Assessment reports a wide range of data including tourism trends, key attractions and food establishments, accommodation providers by sub-area and a profile of visitors to the area.

2.99 The Assessment providers the results of visitor surveys undertaken in 2016 and 2018 for the three largest towns in the County Borough, namely Conwy, Llandudno and Colwyn Bay:

- **Conwy Positives**: The castle, walls and history are the main positive aspect of Conwy, with a large number coming for the history and culture of the town. Also popular are the shops, cafes and restaurants. The quayside was mentioned in particular by those with children who said that there was lots to do in the town to keep the children entertained.
- **Conwy Negatives**: By far the overwhelming negative aspect to the destination was the lack of parking with a sizeable number stating that they had found it difficult to park in and around Conwy town.
- **Llandudno Positives**: There were a variety of positive comments about Llandudno as a tourist destination. At the top of the list are the Promenade, Pier, Orme and beaches with their fantastic scenery. Visitors like the fact that the promenade is flat for walking and that the whole area is clean and easily accessible. A large proportion of visitors mentioned the shops as a positive aspect of the town alongside the Cafes and restaurants with staff praised for being friendly. Venue Cymru was mentioned by a smaller number of visitors as a key attraction to the town with the theatre and conference centre.
- **Llandudno Negatives**: Too many seagulls was the main negative aspect of the destination alongside parking. There were also concerns about the lack of activities or attractions when it is raining. A small number of visitors also suggested that signposting around the town needed to be improved and some of the families with older children felt that there needed to be more on offer to keep them entertained, while families with younger children seemed more likely to say that there was plenty for them to do.

- **Colwyn Bay Positives:** The beach development was mentioned by all visitors as the main positive aspect of the destination alongside the long flat promenade. Visitors said that the area was very good for children and liked that it provided a safe environment. Visitors were also very positive about the Bistro and water sports facilities.
- **Colwyn Bay Negatives:** At the time the survey was conducted, there were still major works to complete a section of the beach and promenade and this was the main area of complaint for visitors. Some felt that the town centre needed more to offer visitors.

Conwy Topic Paper 3: Retail and Town Centres (July 2019)

2.100 The aim of the Conwy RLDP topic papers is to interpret evidence and identify key issues to be addressed in the RLDP. It gives three overarching objectives for retail to be delivered through the RLDP:

- Promote viable urban and rural retail and commercial centres as the most sustainable locations to live, work, shop, socialise and conduct business;
- Sustain and enhance retail and commercial centres' vibrancy, viability and attractiveness; and,
- Improve access to, and within, retail and commercial centres by all modes of transport, especially walking, cycling and public transport.

2.101 To ensure centres are vibrant, the Paper states that policies should encourage a diversity of uses.

BP25: Retail Centre Health Checks (August 2018)

2.102 This Background Paper shows that Conwy's retail centres are generally performing well and are adapting to changes in retailing trends. The following points are relevant:

- The level of tourist visitors to some centres has impacted results and uses differ to the average for similar towns because of this.
- The level of some uses is unbalanced in areas. National policy encourages a diversity of uses, but this should be balanced and deliver vibrant, viable and attractive centres.
- The number of key attractor retail brands is a little low in Llandudno, although this may have been addressed by more recent changes.
- Vacancies are high in some centres and need further monitoring. Colwyn Bay is one town of concern. Regeneration initiatives are underway to address this.
- The historic environment is a key part of our centres and contributes to their unique sense of character. Safeguarding and maintaining these and key features will contribute towards vibrant, viable and attractive retail centres.
- Our centres are accessible by public transport routes and services.
- The findings indicate that there may be a problem with the level of parking provision in Llandudno.
- Crime is low and the town centre users generally feel safe.

3.0 Current Provision and Trends

Introduction

3.1 This section outlines national trends that are likely to influence the need for office, retail and town centre facilities in the County Borough, and the prospects for attracting new investment into the key centres. It also summarises current provision within the County Borough, which provides the baseline for future projections in later sections of this report.

Designated Centres in Conwy County Borough

3.2 Selected designated centres (within the Adopted Local Development Plan) in the County Borough are summarised in Table 3.1, based on Lichfields' land use survey in October 2021 and January 2022. This information confirms Llandudno is the largest centre, both in terms of the total number of retail/service units and the number of comparison goods retail outlets. The Town Centres, excluding Colwyn Bay, are much smaller and vary significantly in terms of the total number of shop units i.e. between 36 to 99 shop units.

Table 3.1 Conwy County Borough's main centres – number of outlets by use (2021/2022)

Centre	Total retail service units	Comparison goods retail	Convenience goods retail	Food/ beverage	Non-retail services	Vacant units
Sub-regional centre						
Llandudno (incl. retail parks)	346	143	23	74	68	38
Town centres						
Colwyn Bay	264	82	17	44	73	48
Conwy	99	35	16	25	14	9
Abergele	90	20	9	18	30	13
Llanrwst	82	22	7	11	21	21
Llanfairfechan	44	11	4	6	13	10
Llandudno Junction	41	7	5	11	14	4
Penmaenmawr	36	14	2	9	7	4
District centres						
Rhos-on-Sea	92	33	6	24	24	5
Old Colwyn	72	15	12	15	18	12
Craig y Don	59	16	6	12	24	1
Kinmel Bay	24	4	2	9	7	2
Local centre						
Deganwy	31	7	1	11	9	3
Total	**1,280**	**409**	**110**	**269**	**322**	**170**

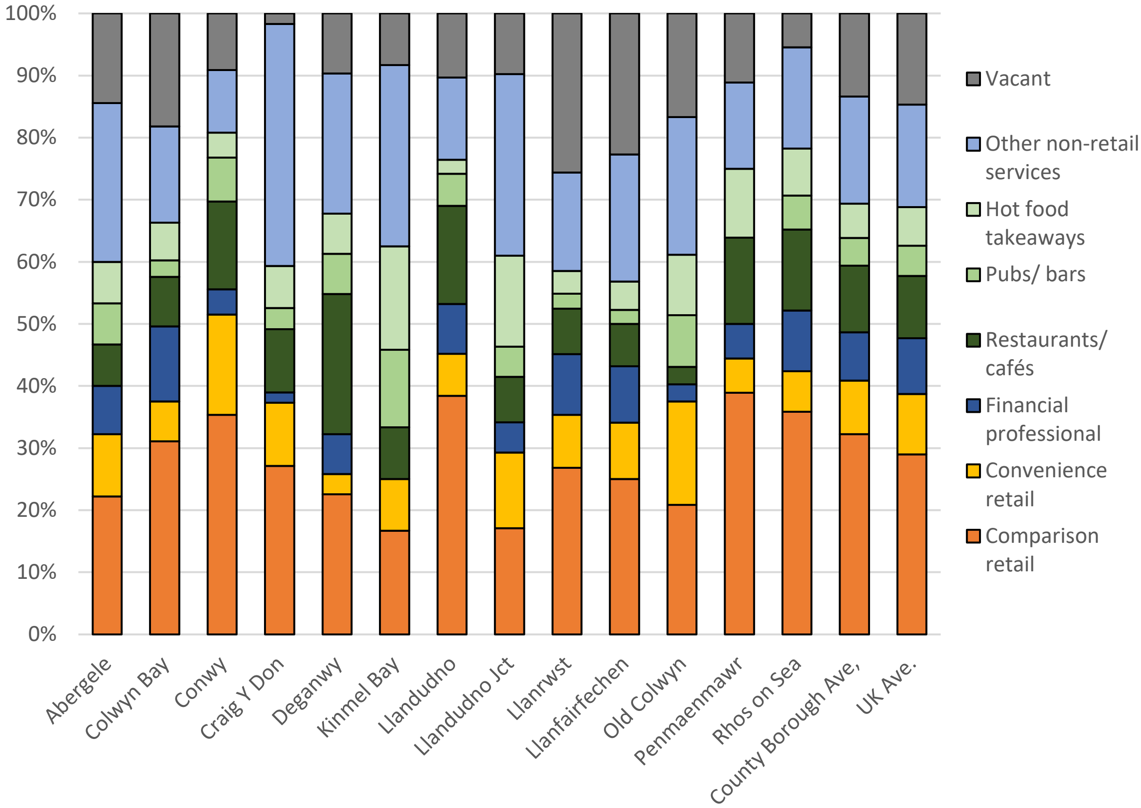
Source: Lichfields' survey (October 2021 and January 2022).

3.3 Over half of the County Borough's comparison goods outlets are concentrated in Llandudno and Colwyn Bay, where most of the national multiple chain outlets are located.

3.4 The RDLP – Preferred Strategy proposes an amended retail hierarchy, which reduces the number of Town Centres from 8 to 5 and all District Centres are downgraded to Local Centres. Rhos-on-Sea, Llanfairfechan and Penmaenmawr are downgraded from Town Centres to Local Centres. Craig y Don is excluded as a Local Centre.

3.5 Figure 3.1 shows the composition of the selected main centres in terms of the mix and proportion of different uses including the proportion of shop units within each use category. This is compared with the County Borough and Goad Plan UK averages. More detail is provided in Sections 7 to 19.

Figure 3.1 Mix of retail and service uses



Source: Lichfields land uses survey 2021/22 and Experian Goad Plans UK average 2021.

3.6 The mix of uses varies significantly reflecting the different character and role of each centre, but all centres have a reasonable degree of diversity between retail, non-retail services and food/beverage outlets.

3.7 The proportional representation of comparison goods shopping outlets is particularly strong in Llandudno, Penmaenmawr and Rhos-on-Sea. The food/beverage sector (i.e. restaurants, cafés, pubs and bars) is well represented in the main tourist destinations at Conwy, Llandudno and Rhos-on-Sea. The provision of hot food takeaways is high in Llandudno Junction, Old Colwyn and Penmaenmawr.

3.8 The non-retail service uses in all centres perform an important role in the overall offer of a centre and encourage customers to shop locally. These non-retail service uses include:

- financial and professional services including banks, building societies, financial services, estate agents and employment agencies; and,
- Other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

3.9 All centres apart from Conwy have a reasonable selection of non-retail services.

3.10 Shop vacancy rates also vary significantly with relatively low levels in Conwy, Craig y Don, Deganwy, Llandudno, Llandudno Junction and Rhos-on-Sea. Shop vacancy rates are particularly high in Llanrwst, Llanfairfechen, Old Colwyn and Colwyn Bay.

3.11 The relative performance of town centres can be demonstrated by commercial property values, for example Zone A rental levels achieved for retail properties. Prime Zone A retail rents are shown in Table 3.2. These rental levels tend to reflect a centre's position within the shopping hierarchy and footfall, therefore larger centres will tend to command higher rents. This trend is evident in Conwy. As a result, retail property values are generally linked to the size of the centre and its position within the hierarchy.

Table 3.2 Conwy County Borough's main centres – Prime Zone A retail rental levels

Centre	Prime Zone A Rent £ per sqm
Llandudno	750
Conwy	250
Colwyn Bay	225
Rhos-on-Sea	225
Abergele	220
Llandudno Junction	190
Deganwy	175
Craig y Don	170
Penmaenmawr	150
Llanrwst	145
Kinmel Bay	130
Llanfairfechan	125
Old Colwyn	100

Source: Valuation Office Agency

3.12 The analysis of the hierarchy of centres indicates the County Borough has a well-established network of centres that currently serve their respective areas. The network of town centres and local centre should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

Key Drivers of Change

Impact of Covid-19 and Brexit

3.13 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth fuelled demand for new retail floorspace. Since the last recession expenditure growth has been much slower and the demand for retail floorspace has reduced.

3.14 Experian is a data provider most often used for development plan evidence base studies. Experian provides consumer expenditure and other economic forecasts. Experian's latest (January 2022) forecasts suggest slower expenditure growth for the foreseeable future. Home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping. Experian's short-term expenditure growth projections (2021 and 2022) for retail and leisure now reflect Brexit and the Covid-19 pandemic. The main implications of Brexit and the Covid-19 crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;
- short term impacts on the mix of uses and customer behaviour that are likely to distort the base year position; and,
- longer terms structural impacts that could affect the nature of town centres and the way consumers shop, eat/drink out and participate in leisure activities.

3.15 The key uncertainties relating to the first two points are primarily the length of Covid-19 crisis and likely recovery period. The longer-term structural implications are harder to predict and quantify at this stage, but recent data provides a good early indication.

3.16 In the short term, operators have faced elevated risks to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services have been hardest hit during the Covid-19 crisis. Short term supply chain disruption could lead to inflationary pressure, which may have an impact of consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery are benefiting at least in the short term. There is likely to be an accelerated structural shift to multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres due the impact of the pandemic. This structural shift was already gathering pace before the pandemic.

3.17 Bearing these trends in mind, following the Covid-19 crisis there is likely to be a spike in town centre vacancies with unfortunately some businesses failing to re-open, particularly non-food retail operators, restaurants and leisure uses. However, the likely increase is uncertain at this stage. Many national operators have already announced job losses and store closures e.g. most recently Gap.

3.18 The Covid-19 crisis and Brexit could have some short-term impact in terms of population migration levels and construction activity. Given that the focus of this study is to assess the long-term projections (i.e., the base year to 2025, 2028 to 2033), the future strategy should assume population projections will return to projected levels by 2025. The first interval population projections in 2025, and certainly later years, should not be significantly affected by the Covid-19 crisis.

3.19 Office of National Statistics [ONS] monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. After January 2021, sales had recovered to 9% above pre-Covid levels by April 2021. The latest seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.

3.20 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February level during March to November 2020.

3.21 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.

3.22 During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.

3.23 It is difficult to predict the longer-term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing.

3.24 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth when compared with historic trends. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer-term forecasts should be monitored and kept under review.

3.25 These on-line shopping national trends have been reflected in Conwy. The household survey results undertaken in October 2021 suggest about 22% of respondents do most of their non-food shopping on-line. These survey results suggest it is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible.

Long-term expenditure trends

3.26 Planning based on long terms expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted bearing in mind the uncertainties relating to the growth in on-line shopping.

3.27 For convenience goods, Experian's latest forecasts (January 2022) suggest a 2% reduction in expenditure per capita during 2022 and then limited growth thereafter (0.1% per annum). Experian expects slow expenditure growth and most of this growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Conwy County Borough is likely to relate to population growth or qualitative areas of deficiency.

3.28 For comparison goods expenditure, higher levels of growth are expected in the future (between 2.8% to 2.9% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

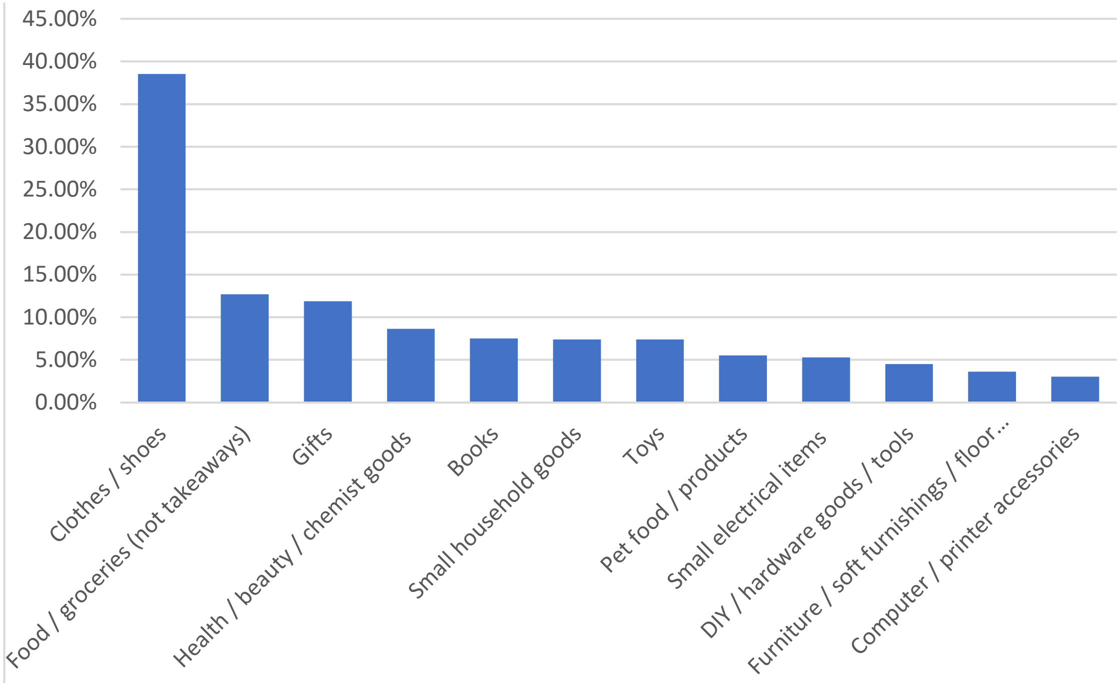
3.29 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 19 (January 2022) states:

"After having eased in 2021, we expect the SFT (special forms of trading) market share to continue to grow strongly in the mid-term, hitting above 30% in 2025. The pace of e-commerce is anticipated to moderate over the longer term, reaching 36.5% of total retail sales by 2040."

3.30 The floorspace capacity assessment in this study update makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

3.31 The household survey results indicate many households regularly buy items from the internet for home delivery. As indicated above, about 22% of respondents do most of their non-food shopping on-line. The main products regularly purchased online are shown in Figure 3.2. These results indicate that a wide range of goods are purchased via the internet for delivery. However, clothing/shoes are the items most often purchased online. The household survey results indicate that 8.5% of households did their last main food and grocery shop via the internet/delivery.

Figure 3.2 Items/services regularly purchased online for delivery (% of respondents)



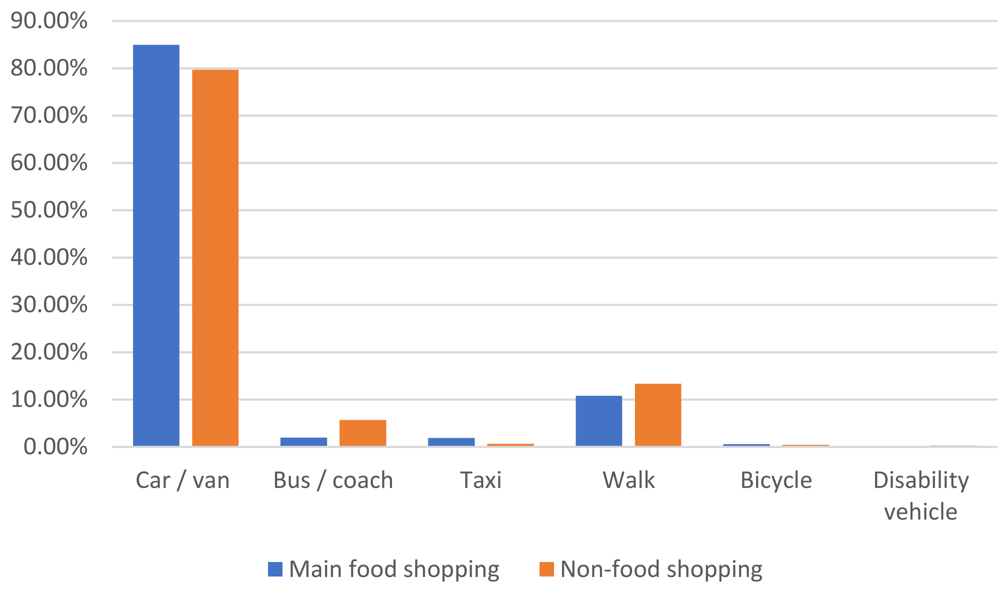
Source: NEMS household telephone survey results October 2021

Mode of travel and combined activities

3.32 As indicated above, 22% of respondents do most of their non-food shopping on-line and 8.5% did their last main food and grocery shop via the internet/delivery. Experian suggests over 30% of retail sales was via non-store activity in 2021. These figures suggest many households do not need to travel to undertake food and non-food shopping. Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 3.3.

3.33 Shopping by car (driver or passenger) is the most popular mode of travel for both non-food and main food shopping trips and relatively low proportions of customers use public transport or walk to shop for both food and non-food shopping. Based on Lichfields' recent experience, car usage is much higher in predominantly rural areas outside of the major cities across the country i.e. normally over 80% of households for main weekly shopping.

Figure 3.3 Mode of travel for non-food and main food shopping (% of travelling household respondents)

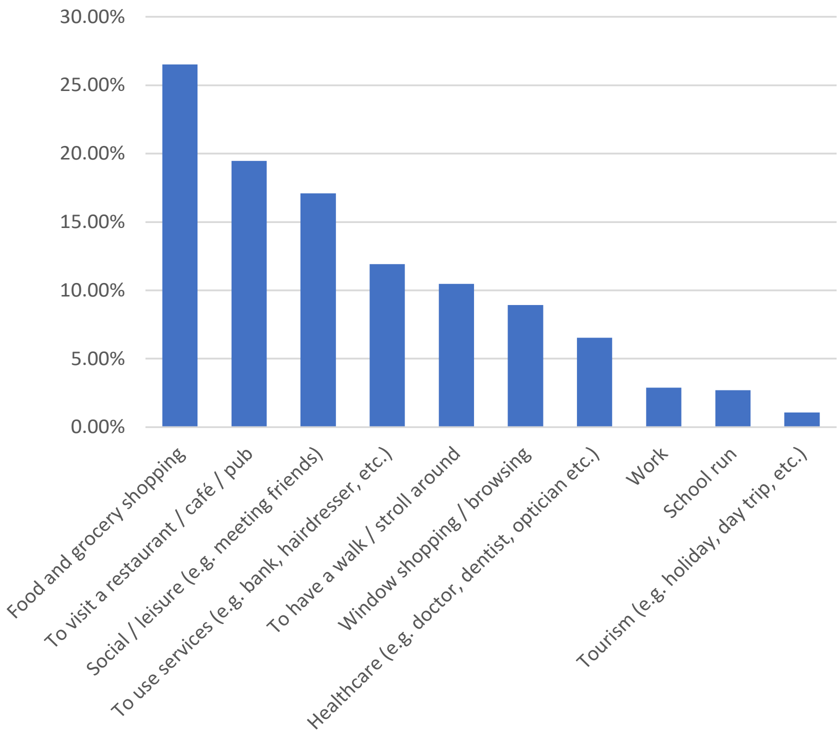


Source: NEMS household telephone survey results October 2021

3.34 Car usage is slightly higher for main food shopping than for non-food shopping because many households undertake bulk food and grocery shopping once a week or less often. Bus/coach travel and walking are slightly higher for non-food shopping.

3.35 The household survey results indicate just over 30% of respondents who travel to undertake non-food shopping link this trip with another activity. The main combined activities are shown in Figure 3.4.

Figure 3.4 Activities combined with non-food shopping trips (% of respondents who undertook a combined trip)



Source: NEMS household telephone survey results October 2021

Demand for town centre floorspace

3.36 Lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the past decades. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but have now increased to 14.7% in 2021. It seems likely there will be a sharp increase in shop vacancies in many town centres, as and when the impacts of the Covid-19 pandemic are fully felt over the next 12 months.

3.37 The number of vacant shop units within Conwy's 13 main centres was 170 in October 2021. The average shop vacancy rate in these centres was 13.4%, slightly lower than the UK average (14.7%). The general decline in the number of comparison goods retail outlets within town centres appears to have been evident in Conwy's centres. Lichfields' land use survey suggests the number of comparison goods shops in the 13 main centres is 405 outlets, only 32% of all shop units.

3.38 Property owners, landlords and funds have also come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e. an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all of its debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets and are likely to be exacerbated by the coronavirus pandemic, at least in the short-term. Excluding Llandudno and to a lesser extent Colwyn Bay, the main centres in the County Borough have a relatively small number of national multiple retailers and may be less affected by this rationalisation of store portfolios.

3.39 Whilst the Company Voluntary Arrangements [CVA] process has created headaches for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for leisure and entertainment uses.

3.40 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats). Several proposed larger food stores have not been implemented across the country. There has been a move away from larger stores to smaller formats, reflecting changes in customers' shopping habits. The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This trend is evident in Conwy with four discount food stores operated by Aldi and Lidl.

3.41 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers have sought large out-of-centre stores, for example Next and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends slowed significantly before the Covid pandemic and are unlikely to re-emerge for the foreseeable future.

3.42 The demand for premises within the bulky goods sector, including furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This can lead to the relocation of retailers creating more vacant units in town centres. The retail warehouse sector is generally well represented in Llandudno. However, in the last 5 years there has been pressure to shift from bulky to non-bulky comparison goods and this trend is likely to continue.

3.43 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in Conwy, with Llandudno as the focus of comparison goods national multiples, with limited representation in the smaller centres.

3.44 In general, operator demand for space has decreased since the last recession and, of those national multiples looking for space are likely to continue to prefer to locate in Llandudno. Other centres in Conwy are at a lower level in the hierarchy and multiple operator demand will may be much lower in these centres in the future. Much of the occupier demand in many smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Polarisation of investment in the larger centres is likely to continue in the future. However, smaller vacant units could still be attractive to independent traders and non-retail services, assuming a return to normal levels of growth following the Covid-19 pandemic. Within the main centres some anchor comparison goods stores have closed due to national restructuring including the closure of Bhs, Debenhams and House of Fraser stores, which has created large voids in many town centres. This trend has been most evident in Llandudno with the recent closure of Debenhams.

3.45 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will end. Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (Class A1). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in Conwy's centres with a strong presence of charity shops in most centres. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in peripheral areas within town centres.

3.46 Non-retail service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class A and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as takeaways), funeral parlours and post offices;
- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
- restaurants, cafés and hot food takeaways; and,
- pubs/bars.

3.47 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities. This trend has not been particularly evident in parts of the County Borough with relatively modest proportions of betting shops in most centres. The provision of hot food takeaways is lower or around the UK average in most centres in the County Borough, except in some of the smaller centres servicing local needs.

3.48 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Some of these uses have led to a growth in the evening economy in town centres, particularly restaurants, pubs/bars and entertainment activities. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

3.49 Recently some restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand has continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly. This sector in town centres has been the most adversely affected by the Covid-19 crisis and the potential for growth in the short-term is uncertain.

3.50 The key categories for food and beverage offer are:

- *Impulse*: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
- *Speed eating fast food*: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- *Refuel and relax*: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and,
- *Casual dining/leisure dining*: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

3.51 The proportion of non-retail uses within town centres across the country has increased significantly. This trend has been experienced in Conwy County Borough, but a short-term reduction seems likely following the Covid-19 crisis. The mix of uses within the County Borough's main centres is explored in more detail in Sections 7 to 19 in this report.

3.52 The increase in vacant shop space has led to an increase in premises available for temporary uses or pop-up uses including pop-up restaurants, pop-up bars, pop-up shops and pop-up galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may increase following the Covid-19 crisis.

3.53 The trends and changes highlighted in this section, including the growth of home shopping are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.

3.54 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad UK shop vacancy rate increased to over 14% during the last recession but has not returned to pre-recession levels (around 8%). The UK vacancy rate is now over 14% and is expected to increase following the Covid-19 crisis, and therefore a cautious approach to future growth is required.

3.55 Shopping behaviour will continue to change, and the high street must respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience for those looking for a "day out" or "evening out".

Future Office Working Patterns

3.56 The Covid-19 pandemic has had unprecedented effects on the office market, with most firms being forced to shift to a 100% home working model for a period of time whilst making long-term arrangements for increased workforce flexibility. In terms of office-based employment, homeworking, whilst no longer a requirement at the time of writing, is likely to remain increasingly prevalent compared to pre-Covid trends. Firms that previously had traditional 100% office-based working patterns were forced to rapidly adapt to the restrictions, building the technological infrastructure to allow for 100% homeworking. For many this provided a testing ground for a hybrid model going forward, with many firms continuing to allow a greater level of flexibility. However, for some this will also have highlighted the value of day-to-day social interactions and the belief that physical interaction is a key catalyst for innovation.

3.57 According to the latest ONS survey on business and individuals' attitudes towards homeworking, the proportion of working adults who did any work from home increased to 37% in 2020 compared to 27% in 2019[1]. As expected, improvements in work-life balance were stated as the biggest positive by workers, with challenges of collaboration the biggest negative. Of adults who worked from home during the pandemic, 85% wanted a "hybrid" method of working.

3.58 This change in expectations has meant that firms are now planning for a higher level of flexibility, and many are experimenting with new ways of working, with 32% of firms stating they were not sure what proportion of their workforce would continue to regularly attend the office. 24% of firms surveyed stated that they intended to use increased homeworking going forward, with the IT and communications industry recording the highest proportion at 49% of all firms surveyed.

3.59 As such, several new models are likely to emerge across various sectors, with some firms allowing fully flexible arrangements, some stipulating that a certain number of office attendances per week or fortnight are expected, and others returning to a 100% office-based workforce.

3.60 For this reason, it is difficult to confidently make bold predictions in terms of a shift in the quantum of space required by corporates coming out of this crisis, with these effects more easily revealed through observation over the course of the economic recovery. Commercial property agents and experts consider the physical office will once more take centre stage in facilitating interaction and collaboration and, ultimately, employee health, well-being and productivity.

3.61 In the longer term, some companies may re-think their portfolios, looking at how their operations can be more resilient, perhaps adopting a multi-site / hub-and-spoke strategy. This may potentially benefit locations outside of city centres with companies retaining a main presence in larger commercial centres with smaller satellite offices in surrounding towns and office parks.

3.62 The flexible space sector has taken a huge hit throughout the pandemic, with many flex locations remaining open for business but with low utilisation. Moving forward however, it is likely that demand for flexible space will continue to be an important feature, providing short-term and agile office use for firms looking to downsize or new firms not yet ready to commit to floorspace, as well as acting as local bases for workers now less obligated to commute to a main office.

[1] ONS (2021): Business and individual attitudes towards the future of homeworking, UK: April to May 2021

4.0 Need for Office Uses

Introduction

4.1 Commercial property market data from CoStar can be used to gain more insight on industrial and office floorspace. CoStar is an online commercial property database maintained by a team of market researchers which tracks in detail properties that appear on the market. Whilst this means that CoStar does not capture 100% of properties and floorspace as tracked by the Valuation Office Agency [VOA], it is considered as relatively accurate for larger properties and provides insight and market analysis not otherwise available.

Quantitative Demand Forecasting

4.2 On behalf of the Council, Lichfields prepared an update to its ELR in October 2020. The ELR examined B-Class employment land needs (i.e. office and industrial) over the plan period 2018 to 2033, taking into account the pandemic and the uncertainties surrounding the consequences of Brexit. This included an analysis of the latest econometric forecasts for how the County's economy may change and the effect on different sectors over the short and medium-term and test the impact on key industrial sectors.

4.3 Lichfields modelled a number of quantitative scenarios considering the need for office and industrial (i.e. manufacturing and warehousing) floorspace over the 15 year plan period for Conwy County Borough. A range of factors were considered to inform the final judgment on the appropriate level of need:

1. The Experian baseline scenario projected that there will be a modest gain in B-Class jobs between 2018 and 2033. In comparison, the demand-led Policy-On and EGS Target Job Growth scenarios generated more substantial increases in B-Class jobs due to economic restructuring and increased local demand for premises.
2. There has been a modest net annual gain of employment land most years between 2007 and 2020. If this trend is allowed to continue, then it would result in a moderate net increase in the supply of employment land equal to 11.17 ha. Over the past 2 years take up rates have fallen compared to the longer-term average previously recorded, which will have a modest impact on need.
3. Enquiries data suggested that there is greater demand for warehousing and storage premises than office floorspace. However, the level of enquiries was volatile and there was a distinct drop off during the previous recession and in 2013.
4. There is a net outflow of 4,784 residents who commute out from Conwy County Borough to work in other areas. The County Borough has a lower job density ratio of 0.72 compared to the Welsh average of 0.74 and neighbouring authorities. Rebalancing the land uses of the County to ensure that more (and better quality) jobs are provided could help to reverse this trend and 'claw-back' out-commuters, reducing net out-commuting rates. This scenario generated a higher requirement for B-Class employment land compared to all the other scenarios. New data on job densities from ONS suggests that the situation is now reversing, and the County Borough now has density levels that are higher than the Welsh average, at 0.81 compared to 0.78. For this reason, it was considered that this scenario retains only the 3,500 net job growth aspired towards in the County Borough EDS to 2027, with growth levels returning to the Experian baseline for the remainder of the Plan period.
5. All of the labour supply scenarios indicated that the labour force is forecast to increase up to 2033, although the level of job growth is still lower than that associated with the

econometric projections. On this basis between 14.20 ha and 15.46 ha (gross) could be required.

Table 4.1 Conwy County Borough gross employment land scenario comparisons (2018 to 2033)

Scenario		B1a/b	B1c/B2	B8	Total*
1) Experian Baseline	Net	1.82	-0.70	0.82	**1.93**
	Gross				14.23
	+ Flexibility factor				**16.44**
2) Policy On	Net	3.70	1.13	0.82	**5.65**
	Gross				17.95
	+ Flexibility factor				**20.15**
3) CCBC EGS Job Target + Reduced Out commuting	Net	3.22	0.16	2.01	**5.39**
	Gross				17.69
	+ Flexibility factor				**19.90**
4) 2018 based Principal (Central) Projection	Net	1.16	-1.07	0.25	**0.34**
	Gross				12.64
	+ Flexibility factor				**14.84**
5) 2018 based Lower Growth Variant	Net	0.89	-1.22	0.02	**-0.31**
	Gross				11.99
	+ Flexibility factor				**14.20**
6) 2018 based Higher Growth Variant	Net	1.41	-0.93	0.47	**0.96**
	Gross				13.26
	+ Flexibility factor				**15.46**
7) Past Take Up Rates	Net				11.17
	Gross				16.53
	+ Flexibility factor				**18.74**

Source: Lichfields analysis, taken from CCBC's Employment Land Review – Covid-19 Update (October 2020)
Rounding errors may mean sums do not add.

4.4 Consequently, on the basis of these considerations, for the County Borough, the ELR concluded that a range of **between 14 ha and 20 ha (gross) of employment land was needed to 2033**. Scenario 4 (2018-based Sub National Population Projections [SNPP] Central projection) represents the lower end of the scale, and Scenario 2 Policy On represents the upper end.

4.5 **Of this range, it was recommended that around 65% should be identified for B1c/B2/B8 industrial/warehousing, and the remaining 35% for new office space.** This was based upon the forecast employment changes over the period to 2031, changes to the existing stock in recent years, and analysis of enquiries recorded by the Council.

4.6 In terms of how this demand relates to supply, the 2019 *Replacement Local Development Plan 2018-33 Background Paper 17: Employment Land Supply* noted that there was a total of 13.46 ha of undeveloped allocated land remaining, of which **8.86 ha** was assessed as being suitable to carry forward to the RLDP as forward supply. Excluding the 29.7 ha site at Tir Llwyd Business Park (which was excluded due to flood constraints), the report further noted that there was potential for a further **0.5 ha of safeguarded employment land** that had not yet come forward (relating to land at Ty Gwyn), whilst a further **2.86 ha** of land had **extant planning permission** for B1, B2 and/or B8 uses as of May 2019. 10,997 sqm, or **1.1 ha**, comprised developed occupied or vacant premises in existing employment sites (that had the potential for intensification if occupied).

4.7 As can be seen in Table 4.2, this suggests that the current employment land supply in Conwy, comprising total allocations, permissions for B class, safeguarded land and vacant existing is 17.92 ha which is reduced to **13.32 ha** based on the initial qualitative assessment (as at March 2019).

4.8 This is split by centre set out below and indicates that the bulk of the forward supply is located in Abergele (5.38 ha), Conwy (2.42 ha), Llandudno Junction (1.78 ha) and Llandudno (1.4 ha). It should be noted that the deposit version on Conwy County Borough's new Local Plan will update these figures accordingly.

Table 4.2 Employment land supply (May 2019)

	LDP Allocated Sites remaining	Qualitative assessment to carry forward	Safeguarded Employment Land Not Yet Started	Other sites with extant planning permission	Vacant Stock within existing employment sites
Sub-regional centre					
Llandudno	Former Goods Yard: 1.4 ha	Former Goods: Yard 1.4 ha			
Town centres					
Colwyn Bay				Coed Pella Road: 0.3 ha	Former Dairy Site, the Creamery Business Park: 0.010 ha Former Council Tip, Diamond Units: 0.009 ha Former Council Tip, Parc Elwy: 0.021 ha Quinton Hazell: 0.407 ha Former Council Tip Conway Road: 0.067 ha Llys Eirias Offices: 0.063 ha
Conwy	Penmaen Road, Conwy: 0.5 ha	Penmaen Road, Conwy: 0.5 ha		Penmaen Road, Conwy: 1.9 ha Riverside Business Park, Conwy: 60 sqm (0.015 ha)	Former Fisheries Research Site, Telford Lodge: 0.009 ha
Rhos-on-Sea					
Abergele	Abergele Business Park: 0.6 ha Abergele South East: 1.0 ha Abergele South East: 3.7 ha	Abergele Business Park: 0.6 ha Abergele South East: 1.0 ha Abergele South East: 3.7 ha			Pensarn Business Park: 0.008 ha Abergele Business Park: 0.070 ha
Llanrwst			Ty Gwyn: 0.5 ha		
Llanfairfechan	Land at Orme View Filling Station (Allocated site): 0.5 ha Land at Orme View Filling Station (Safeguarded site): 0.5 ha				
Llandudno Junction	Esgyryn, Narrow Lane, Llandudno Junction: 2.26 ha Northeast of Former Goods Yard: 0.4 ha	Esgyryn, Narrow Lane, Llandudno Junction: 0.96 ha Northeast of Former Goods Yard: 0.4 ha			Tre Marl 3: 0.392 ha Glan y Mor Road: 0.025 ha
Penmaenmawr					
District centres					
Old Colwyn					
Craig-y-Don					
Kinmel Bay			Tir Llwyd Business	Foryd Bank: 439 sqm	Tir Llwyd: 0.019 ha

	LDP Allocated Sites remaining	Qualitative assessment to carry forward	Safeguarded Employment Land Not Yet Started	Other sites with extant planning permission	Vacant Stock within existing employment sites
			Park: 29.7 ha, but not included due to flood constraints	(0.11 ha) St. Asaph Avenue: 728 sqm (0.182 ha) Engineer House, Tir Llwyd Industrial Estate: 160 sqm (0.04 ha)	
Local centre					
Deganwy					
Rural					
Cerrigydrudion	Site R5 off the B5105: 1.0 ha				
Dolgarrog	Land at Memorial Hall: 0.3 ha	Land at Memorial Hall: 0.3 ha			
Llangernyw	Site R44 Llangernyw: 0.3 ha				
Llansannan	Land at Llansannan: 1.0 ha				
Total	**13.46 ha**	**8.86 ha**	**0.5 ha**	**2.86 ha**	**1.1 ha**

Source: CCBC (May 2019): *Replacement Local Development Plan 2018-33 Background Paper 17: Employment Land Supply*)

Property Market Signals

Commercial Overview

4.9 The office market in Conwy is centred on three main areas, namely, Colwyn Bay, Llandudno and Abergele. Colwyn Bay has the largest floorspace of both traditional and new build offices located mainly on Princes Drive and Wynnstay Road with additional edge of centre space at Heritage Gate Business Park and Penrhos Manor. As with other towns there is space above retail shops which offers an opportunity for conversion to offices subject to demand. The Colwyn Bay market has been greatly impacted by COVID restrictions which has particularly affected the occupation of the Council's Coed Pella offices which are currently mostly vacant.

4.10 Within the past two years there have been virtually no enquiries for office space, although this will have been impacted by the Covid-19 pandemic. What little demand exists generally comes from businesses looking to relocate, and rarely relates to town centre locations due to the general quality, sizes and age of stock available in central locations. There are recent examples of this in Colwyn Bay, including Richard Broun Associates moving from three storey period offices on Mostyn Road in Colwyn Bay to modern, open plan space at Princes Park. Spillane Financial Services also moved from Commodore House in Colwyn Bay to the former Williams & Glyns Bank premises. Indeed, it is common for relocating businesses to look towards out of centre provision in existing office buildings and parks as they upscale or seek more modern premises with car parking facilities.

4.11 **Agents were of the view that Homeworking has substantially reduced current demand for conventional converted office space in town centres.** Whilst demand may increase as workers return to the office, it is unclear if or when demand will reach pre-Covid levels, meaning conversion of office back to residential may prove more attractive to property owners in the post-Covid landscape. **However, agents also noted that the cost of conversion to residential where possible is often prohibitive for property owners.**

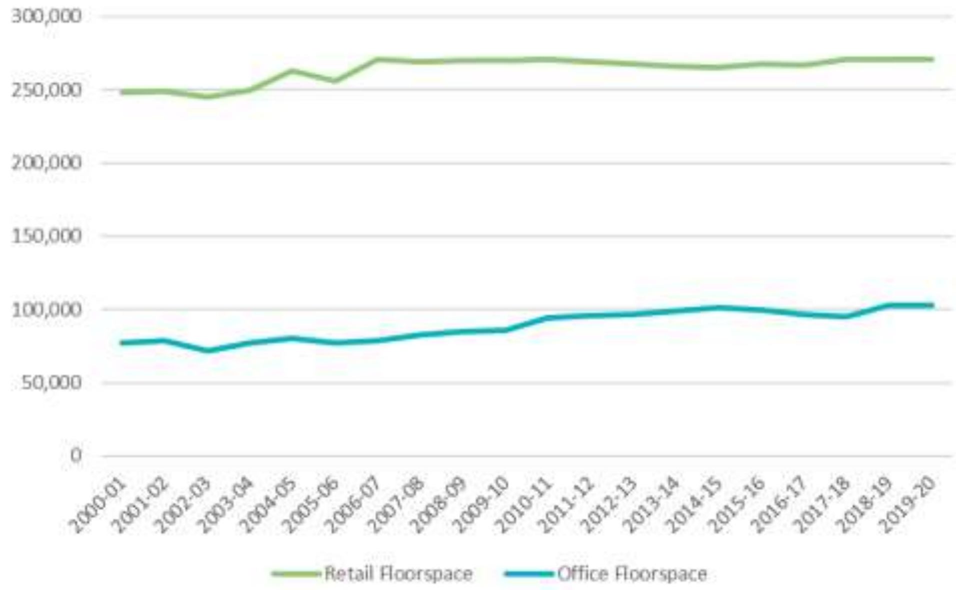
4.12 In terms of vacant space there are three units available at North Wales Business Park, Abergele totalling 2,000 sq ft and the following at Heritage Gate, Colwyn Bay, and Princes Drive

- Plas Eirias: 1,500 sq ft
- Bryn Eirias: 9,960 sq ft
- Princes Park 1: 2,500 sq ft
- Princes Park 2: 2,058 sq ft
- Raymond Court: 4,100 sq ft

Floorspace Trends

4.13 According to the latest data from the VOA, Conwy Borough had a total of around 271,000 sqm of retail floorspace in 2019/20, having grown by 23,000 sqm or 9.3% since 2000/01. In comparison, the amount of retail floorspace across Wales grew by 16.4% over the same period, and by 9.8% across England and Wales. This indicates that retail is growing more slowly in Conwy than the Welsh average.

Figure 4.1 Retail and office floorspace in Conwy, 2001 - 2020



Source: VOA (2020)

4.14 Office floorspace in the Borough totalled around 103,000 sqm in 2019/20, having grown by 26,000 sqm or 33.8% since 2000/01. Office floorspace accounts for around 15.3% of total employment space in the County Borough, a higher share than Wales (11.7%) but lower than England and Wales. This is a much higher level of growth than seen across Wales (24.7%) and England and Wales (10.5%) over the same period. This indicates the County Borough has a relatively strong office market for Wales which has seen strong growth over the past two decades.

Age and Quality of Office Stock

4.15 CoStar's star rating system uses market-tested criteria which allows for analysis of the quality of existing office and industrial stock. CoStar's criteria takes account of architectural design, structures/systems, amenities, site/landscaping/exterior, and certifications.

4.16 Table 4.3 shows the quality of existing office stock within Conwy, broken down by properties and floorspace. The Borough is dominated by properties rated as two- or three-star quality, accounting for 86.5% of all properties. 11 properties (8.7%) are rated as one-star, whereas six (4.8%) are rated as four-star quality with zero achieving the highest classification. In terms of floorspace the 11 one-star properties are all small, adding to just 1,628 sqm or 2.6% of the total stock. 70.3% of all floorspace is rates as two- or three-star, with just under 17,000 sqm or a relatively high 27.1% of stock rated as being four-star quality across six properties.

4.17 Four of the six office properties rated as being four-star quality are located at The Point in Llandudno Junction, with the remaining two being in Colwyn Bay, including the Conwy County Borough Council Offices and a property at Heritage Park.

Table 4.3 Quality of office stock in Conwy

	Properties		Floorspace	
	#	%	Sqm	%
1 Star	11	8.7%	1,628	2.6%
2 Star	58	46.0%	20,196	32.2%
3 Star	51	40.5%	23,882	38.1%
4 Star	6	4.8%	16,974	27.1%
5 Star	0	0.0%	0	0.0%

Source: CoStar (March 2022)

4.18 Table 4.4 shows the age of office properties and floorspace in Conwy. It should be noted that not all properties within CoStar include a build date, so the table only provides an indication of age patterns based on the available data. The table indicates that newer properties tend to be larger, with 28.7% of all floorspace built since 2010 consisting of just six properties (five of these are rated as four-star quality out of the six discussed above). Meanwhile at the other end of the scale, 54.6% of properties were built pre-1950, although these account for only 31.6% of floorspace, indicating that there is a large amount of old and smaller stock across the Borough.

Table 4.4 Age of office stock in Conwy

	Properties		Floorspace	
	#	%	Sqm	%
After 2010	6	6.2%	15,200	28.7%
2000's	11	11.3%	8,288	15.7%
1990's	7	7.2%	6,990	13.2%
1980's	5	5.2%	771	1.5%
1970's	2	2.1%	346	0.7%
1960's	6	6.2%	1,050	2.0%
1950's	7	7.2%	3,542	6.7%
Pre 1950	53	54.6%	16,699	31.6%

Source: CoStar (March 2022)

Floorspace Availability

4.19 Table 4.5 shows availability and vacancy rates for office space in Conwy. Available space is any space that is currently being marketed, regardless of if the space is currently vacant. Similarly, vacant space is unused space that may or may not be on the market. Across the Borough, around 2,544 sqm or 4.1% of office space is currently being marketed. Meanwhile, around 2,359 sqm or 3.8% of all office space is currently marked as vacant.

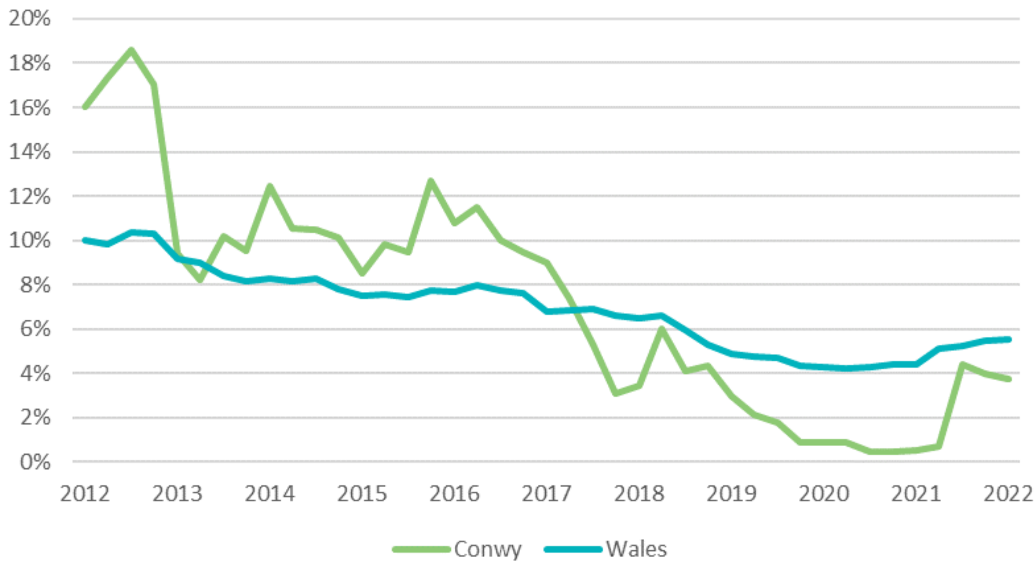
Table 4.5 Office availability and vacancy in Conwy

	Properties	Floorspace	Available		Vacant	
Office	126	62,679	2,544	4.1%	2,359	3.8%

Source: CoStar (March 2022)

4.20 Figure 4.2 shows office vacancy rates for Conwy and Wales since 2012. Vacancy rates in Conwy have been on a downward trend over this period, with a high of 17.3% in 2012 and a 10-year average of 7.5%. Vacancy rates in Conwy have also been below the Welsh average level since 2017. This indicates that there is not an oversupply of office space in actual terms and that vacancies may be down to premises being of low quality and/or in the wrong locations.

Figure 4.2 Office vacancy rates in Conwy and Wales



Source: CoStar (March 2022)

Rental Levels

4.21 The average market rent for office space in Conwy stood at around £11.20 per sq ft in Q4 2021 and is expected to rise beyond £12.00 per sq ft in 2022. Rents in the Borough have begun to rise since 2020 following a long period of relative stagnation since 2012, the 10-year average being about £10.50 per sq ft. Average rents across Wales have risen more steadily over this period from a low of £11.00 per sq ft in 2014 to just under £13.50 in the latest quarter.

Figure 4.3 Market rent per sq ft in Conwy and Wales

Source: CoStar (March 2022)

Development Rates

4.22 Data on gross completions for the period 2007/08 to 2019/20 has been analysed. The data did not specify annual completions or the use class of most developments before 2017/18, but indicated there had been 11.7 ha developed over this time period. Since then, a further 2.63 ha has been developed over three years. The total gross amount of land developed for B-Class employment use between 2007/08 and 2019/20 was therefore recorded as **14.33 ha. This averages 1.10 ha per year over the 13-year period**.

4.23 Over the past three years (since 2017/18), there have been some relatively significant completions, which include:

1 Former dairy site, Station Road, Mochdre – 0.7 hectares (approx. 3,000 sq. m) of B1 & B8 light industrial/storage and distribution;

2 Esgyryn, Narrow Lane, Llandudno Junction – 0.2 hectares (approx. 750 sq. m) of B1 office space;

3 0.85 hectares (approx. 1,500 sq. m) of B1 light industrial and office space at Parc Ty Gwyn, Llanrwst;

4 Coed Pella Council Offices, Colwyn Bay - 0.3 ha B1a (which was not included in the 2018/19 AMR as the site was not allocated or designated in the LDP);

5 Vale Road (ex NWWN site), Llandudno Junction - 0.15 ha B1/B8;

6 Garage – Parc Ty Gwyn Industrial Estate, Llanrwst within a safeguarded employment site - 0.18 ha B2; and,

7 Tir Llwyd – Pure Commercial Units 1 & 2, Kinmel Bay - 0.25 ha B1, B2, B8 (within a safeguarded employment site).

4.24 Whilst the take-up of employment land has generally been suppressed with the exception of 2017/2018, the overall distribution has been in line with the target LDP Growth Strategy.

Losses

4.25 The Council also provided details of the extent of losses to B-Class employment land. Between 2007/08 and 2019/20, losses of B-Class employment land was identified at four sites. However, regarding the 4.7 ha Tre Marl 1 site, the situation has now changed. This was originally included as a loss of employment land due to an approved application for a new food superstore and restaurant. However, subsequent discussions with the Council have indicated that this permission was never implemented and has now lapsed. Furthermore, although within a Safeguarded Employment site, it is understood that most of the uses on there would be classified as Sui Generis rather than B-Class. For these reasons, the site has been removed from the schedule of losses.

4.26 Since the 2019 ELR, permission has been granted and works are underway at the former Goods Yard site (Builder Street) in Llandudno for a residential scheme (ref 0/48144, granted 06/2022), equating to a loss of 1.4 ha of B1 employment land. There have been no other additional losses recorded since the 2019 ELR (i.e. to 2022/23, although it is also noted that the site adjacent to Linney Cooper, Builder Street, Llandudno has had its B1 office building demolished (0.33 ha). Strictly speaking, the site has not yet been 'lost', although there is a currently an application in for replacement B1/B2/B2 industrial units (ref 0/47438) which will not include 'stand-alone offices' but will be focussed towards industrial with ancillary offices. The application was granted at the Council's September 2020 Planning committee.

4.27 Total losses therefore reduce to **6.05 ha** (excluding Tre Marl 1 as set out above), or **0.378 ha a year (over 16 years)**. The losses are summarised in Table 4.6. There was a 50/50 split between B1 and B2/B8 losses.

Table 4.6 Losses of B-Class employment land between 2007/08 and 2019/20

Site	Nature of loss	ha	Former Use class
Abergele Business Park	Partial loss of the allocated site to development of a dementia care centre	0.45	B1
Esgyryn	Partial loss of the allocated site to residential development and a school	2.9	B1
Former NWWN site	Loss of improvement site for the development of a supermarket	1.3	B2 / B8
Former Goods Yard, Llandudno	Loss of the allocated site to residential development	1.4	B1
Total		**6.05**	

Source: CCBC Monitoring Data

4.28 Over the period 2007/08 and 2022/23, setting gross completions of 14.33 ha against losses of 6.05 ha means that there a net gain of 8.29 ha of B-Class employment land, or 0.52 ha annually. This is summarised in Table 4.7.

Table 4.7 Summary of gross and net completions (2007/08 to 2022/23)

		Hectares
Gross completions	Total	14.33
	Annual average	**0.90**
Losses	Total	6.05
	Annual average	**0.38**
Net completions	**Total**	**8.28**
	Annual average	**0.52**

Source: CCBC Monitoring Data

Future Pipeline

4.29 The RDLP – Preferred Strategy proposes five Key Strategic Sites in sustainable and accessible locations, supported by the required infrastructure and proposed phasing over the Plan Period:

Coastal Development Strategy Area [CDSA]:

1. Llanfairfechan – Mixed Use Housing (400 dwellings), Affordable Housing, Primary School, Allotments and Recreational Space. The site is phased between 2021 and 2029.

2. Llanrhos – Mixed Use Housing (250 dwellings), Affordable Housing, Primary School, **1 Hectare of B1 Employment Land**, Allotments and Recreational Space. The site is phased between 2024 and 2031.

3. Old Colwyn – Housing (450 dwellings), Affordable Housing, Allotments and Recreational Space. The site is phased between 2024 and 2033.

4. Abergele – Mixed Use Employment (**4.7 Hectares of B1, B2 & B8**), Retail, Recreational Space and a Primary School. The site is phased between 2021 and 2027.

Rural Development Strategy Area [RDSA]:

5. Llanrwst Key Service Centre - Housing (200 dwellings), Affordable Housing, Allotments and Recreational Space. The site is phased between 2021 and 2026.

5.0 Need for Retail and Food/Beverage Uses

Introduction

5.1 This section provides a quantitative assessment of the scope for new retail and food/beverage floorspace in the County Borough up to 2033. The projections adopt Experian's latest forecasts for population growth, average expenditure per person, special forms of trading [SFT] and sales density growth rates. A further consideration is the potential longer-term implications of the Covid-19 crisis.

Study Area and Population

5.2 The quantitative capacity analysis is based on a defined study area that cover the catchment areas of the main shopping destinations in the County Borough. The study area is sub-divided into four zones or retail areas as shown in Appendix 1.

5.3 Experian's MMG3 projections suggest +2.4% growth in the study area population between 2022 to 2033, increasing from 118,878 in 2022 to 121,787 in 2033 as shown in Table 1 in Appendix 1.

Tourism

5.4 In addition to the resident population, Conwy County Borough benefits from tourist visitors who do not live in the local area. The Welsh Government's Tourism Profile for North Wales 2017 – 2019 indicates the region attracted 26.65 million tourist visitors on average each year, which included 3.65 million domestic overnight trips, 0.3 million international overnight trips and 22.7 million day trips.

5.5 Conwy County Borough attracts a significant share of tourist trips to North Wales. The Steam Final Trend Report for 2008 – 2019 indicates to the County Borough attracted 9.79 million tourist visitors in 2019 including 2.57 million staying visitors and 7.22 million day visitors.

5.6 The County Borough's 2.57 million overnight staying visitors spent a total of 11.14 million nights, an average of 4.3 nights per visitor. Most (80%) of the nights spent in Conwy County Borough were spent in non-serviced accommodation. The total number of visitor days spent in the County Borough was 18.36 million days (11.14 days for staying visitors and 7.22 day trips).

5.7 The Steam Report indicates the number of tourist visitor days steadily increased from 15.47 million in 2008 to 18.36 million in 2019. This 18.7% increase is approximately +1.5% per annum. It is reasonable to assume County Borough can a minimum retain 2019 levels of tourism in the future.

5.8 Tourist visitor (day trips and staying visitors) equates to an extra 50,300 people each day throughout the year, which is significant in the context of the resident population in the study area (118,878 people).

Expenditure forecasts

5.9 All monetary values expressed in this update report are at 2020 prices, consistent with Experian's latest expenditure information. Experian's latest local expenditure figures for the Conwy study area in 2020 have been obtained. Experian's short term EBS growth forecast rates during 2021, 2022 and 2023 reflect current economic circumstances, including the Covid-19 crisis. The forecast changes during this three year period are as follows:

1 convenience goods: -5.5%;

2 comparison goods: +7.0%;

3 leisure: +52.8%.

5.10 Experian's short-term forecasts, particularly for comparison goods and leisure, assume a post-Covid lockdowns recovery during 2021 and 2022. Experian's medium- and long-term growth average forecasts have been adopted, as follows:

1 convenience goods: +0.1% per annum growth during 2024 and beyond;

2 comparison goods: +2.8% per annum growth for 2024 to 2028 and +2.9% per annum after 2028; and,

3 leisure: +1.1% per annum growth for 2024 to 2028 and +0.9% per annum after 2028.

5.11 These growth figures relate to real growth and exclude inflation.

5.12 Experian's latest adjusted deductions for SFT (including home and online shopping through non-retail businesses) in 2020 were:

1 5.4% of convenience goods expenditure; and,

2 25.6% of comparison goods expenditure.

5.13 Experian's projections suggest that these SFT percentages will increase to 7.3% and 29.1% by 2033 respectively. Table 1 in Appendix 2 sets out the forecasts for spending per head on convenience goods within each zone in the study area up to 2033, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 1 in Appendix 3 and food/beverage expenditure is shown in Table 1 in Appendix 4.

5.14 Allowing for population growth, total resident's convenience goods spending within the study area is forecast to increase by +1.9% from £276.05 million in 2022 to £281.16 million in 2033, as shown in Table 2 (Appendix 2).

5.15 Comparison goods spending is forecast to increase by +30% between 2022 and 2033, increasing from £356.19 million in 2022 to £463.09 million in 2033, as shown in Table 2 (Appendix 3).

5.16 Food and beverage spending is forecast to increase by +14.3% between 2022 and 2033, increasing from £151.33 million in 2022 to £172.93 million in 2033, as shown in Table 2 (Appendix 4).

Tourism

5.17 Spread through the year visitor estimates suggest, on average, there were 30,500 staying visitors and 19,800 other visitors in Conwy County Borough each day, 50,300 each day in total. These tourist visitors will use shops, restaurants, bars and other facilities during their stay.

5.18 The Welsh Government's Tourism Profile for North Wales 2017 – 2019 indicates the region attracted 26.65 million tourist visitors on average each year. These tourist trips generated direct expenditure of £1.47 billion per annum.

5.19 Conwy County Borough attracts a significant share of tourist trips to North Wales. The Steam Final Trend Report for 2008 – 2019 indicates to the County Borough's tourist visitors generated direct expenditure of £745.2 million. The breakdown of this expenditure was:

1 Accommodation: £179.67 million (24.1%);

2 Shopping: £263.67 million (35.4%);

3 food and beverage: £168.58 million (22.6%);

4 recreation: £53.35 million (7.2%); and,

5 transport: £79.93 million (10.7%).

5.20 The Steam Report indicates visitors spent £263.67 million on shopping and £168.58 million on catering (food/beverage) in the County Borough in 2019. This equates to an average of around £14.40 per staying visitor per day on shopping and £9.20 per day for catering. The Steam Report does not provide a breakdown of shopping expenditure between comparison and convenience goods, therefore Lichfields adopts a 65:35 split. An allowance for this spending has been included in the analysis.

5.21 The annual expenditure for tourist visitors is estimated to be £432.25 million, broken down as follows: £92.30 million for convenience goods shopping, £171.37 million for comparison goods shopping and £168.58 million for food and beverage. In this context, the additional expenditure generated by tourist visitors is vital to the local economy and Conwy's town centres.

Growth in turnover densities

5.22 Experian's Retail Planner Briefing Note 19 (January 2021) indicates comparison goods retail sales floorspace is expected to increase its average sales density by +9.7% during 2022 and 2023, recovering from the impact of the Covid crisis, but lower growth is envisaged in the medium term (+2.2% per annum up to 2028) and longer term (+2.6% per annum beyond 2028). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the expected high increase in on-line/home shopping through retail businesses i.e., the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.

5.23 For convenience goods retail, Experian indicates an increase of +4.3% during 2022 and 2023, but lower growth is envisaged in the medium term (+0.1% per annum up to 2028) and no predicted growth in sales densities thereafter.

5.24 Experian does not provide projections for food and beverage sales densities. Significant growth is assumed during 2022 and 2023, in line with expenditure growth. This growth reflects the necessary period of recovery required in this sector following the Covid-19 pandemic. An average growth rate of 1% per annum has been adopted up to 2025, allowing for a post Covid-19 recovery. A lower growth rate of 0.5% per annum is assumed after 2025.

Base year market shares

5.25 Expenditure patterns in the 2022 adopts market shares within each study area zones estimated from the results of the household shopper survey in July 2021. These market shares are assumed to have remained constant in the future, although the amount of SFT expenditure deducted has increased based on Experian’s latest forecasts.

Capacity for convenience goods retail floorspace

5.26 Available convenience goods expenditure attracted to Conwy County Borough has been projected forward to 2025, 2028 and 2033, and is summarised in Table 9 in Appendix 2. Convenience goods expenditure available to facilities within the County Borough is expected to increase from £342.14 million in 2022 to £346.16 million in 2033. This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT).

5.27 The benchmark turnover of the main existing food stores and floorspace has been estimated in Table 8 in Appendix 2. This table adopts Oxford Retail Consultants [ORC] food store sales floorspace data and GlobalData’s latest company average sales densities. The combined benchmark turnover of existing food stores and convenience goods shops in the County Borough is £315.15 million. This benchmark turnover excludes small convenience goods shops outside the main centres in the County Borough.

5.28 The base year available expenditure figures when compared with the benchmark turnover suggest that convenience goods retail sales floorspace in the County Borough is collectively trading satisfactorily at 2% above benchmark, although trading performance varies from town to town.

5.29 Table 9 in Appendix 2 subtract the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for new development in the future. There is an existing surplus of +£7.78 million in 2022 due to the above benchmark trading performance. However, this surplus is projected to reduce to a deficit of -£7.16 million by 2025 dues to growth in SFT and sales densities. The projected deficit at 2033 is -£4.48 million.

5.30 The surplus/deficit expenditure projections have been converted into floorspace capacity estimates in Table 10 (Appendix 2), based on an average sales density of £12,000 per sq.m net in 2022, which is an approximate average for the main food store operators. This average turnover density is projected to increase in line with Experian's recommended growth rates. The results are summarised in Table 5.1.

Table 5.1 Convenience goods floorspace capacity (sqm gross) – (cumulative)

Area/Town	2025	2028	2033
Zone 1 - Colwyn Bay	1,095	1,090	1,142
Zone 1 - Old Colwyn	380	379	405
Zone 1 - Rhos-on-Sea	-369	-372	-369
Zone 1 – Conwy Central sub-total	**1,106**	**1,098**	**1,179**
Zone 2 – Abergele	-482	-481	-448
Zone 2 - Kinmel Bay	-2,371	-2,378	-2,366
Zone 2 – Conwy East sub-total	**-2,853**	**-2,859**	**-2,814**
Zone 3 - Llanrwst	337	347	375
Zone 3 - Other Conwy	-103	-110	-100
Zone 3 – Conwy Rural sub-total	**233**	**237**	**275**
Zone 4 - Conwy	423	417	419
Zone 4 - Craig Y Don	-156	-157	-156
Zone 4 - Deganwy	25	25	28
Zone 4 - Llandudno	-96	-100	-16
Zone 4 - Llandudno Junction	118	117	120
Zone 4- Llandudno Jct, out of centre	719	723	790
Zone 4 - Llanfairfechan	-153	-153	-152
Zone 4 - Penmaenmawr	-183	-183	-182
Zone 4 – Conwy West/ Creuddyn sub-total	**697**	**689**	**852**
Conwy County Borough total	**-816**	**-835**	**-509**

Source: Table 10, Appendix 2

5.31 Surplus expenditure up to 2033 indicates that there is capacity for additional convenience goods floorspace in some locations in the County Borough, but in other areas there is a projected over-supply of floorspace.

Capacity for comparison goods floorspace

5.32 Available comparison goods expenditure has been projected to 2025, 2028 and 2033, as summarised in Table 8 in Appendix 3. Comparison goods expenditure available to facilities within the County Borough is expected to increase from £458.98 million in 2022 to £588.59 million in 2033.

5.33 Tables 9 in Appendix 3 subtracts the turnover of existing floorspace (including an allowance for growth in turnover densities) from available expenditure to calculate the amount of surplus expenditure available for new development. The projections suggest future growth in available expenditure will be offset by expected growth in turnover densities up to and beyond 2033, that is existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect, which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.

5.34 Deficit comparison expenditure has been converted into comparison goods floorspace projections in Table 9 in Appendix 3, as summarised in Table 5.2.

Table 5.2 Comparison goods floorspace capacity (sq.m gross) – (cumulative)

Area	2025	2028	2033
Zone 1 - Colwyn Bay	-511	-508	-469
Zone 1 - Old Colwyn	-27	-27	-27
Zone 1 - Rhos-on-Sea	-81	-81	-77
Zone 1 – Conwy Central sub-total	**-618**	**-617**	**-573**
Zone 2 - Abergele	-131	-125	-110
Zone 2 - Kinmel Bay	-77	-77	-74
Zone 2 – Conwy East sub-total	**-209**	**-202**	**-184**
Zone 3 - Llanrwst	-92	-85	-71
Zone 3 - Other Conwy	-44	-42	-38
Zone 3 – Conwy Rural sub-total	**-136**	**-127**	**-110**
Zone 4 - Conwy	-78	-77	-72
Zone 4 - Craig Y Don	-37	-37	-36
Zone 4 - Deganwy	-12	-13	-13
Zone 4 - Llandudno	-3,946	-3,876	-3,597
Zone 4 - Llandudno Junction	-25	-25	-23
Zone 4 - Llandudno Jct, out of centre	-76	-75	-68
Zone 4 - Llanfairfechan	-12	-13	-13
Zone 4 - Penmaenmawr	-13	-13	-13
Zone 4 – Conwy West/ Creuddyn sub-total	**-4,200**	**-4,128**	**-3,835**
Conwy County Borough total	**-5,163**	**-5,074**	**-4,702**

Source: Table 9, Appendix 3

5.35 A comparison goods expenditure deficit is projected at all years, which suggests an over-supply of retail floorspace, resulting in negative floorspace projections.

Capacity for food/beverage floorspace

5.36 Available food and beverage expenditure has also been projected forward to 2025, 2028 and 2033, and is summarised in Table 8 in Appendix 4. The amount of expenditure attracted to the County Borough is expected to increase from £296.11 million in 2022 to £333.64 million in

2033. Table 9 in Appendix 4 subtract the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development.

5.37 There is a projected small expenditure surplus of +£1.51 million in 2025. Continued population and expenditure growth creates a higher surplus of +£8.08 million at 2028, increasing to +£16.13 million in 2033. Surplus expenditure has been converted into food / beverage floorspace projections in Table 9 in Appendix 4, as summarised in Table 5.3.

Surplus expenditure up to 2033 indicates that there is capacity for additional food / beverage floorspace in the County Borough of 3,009 sqm gross.

Table 5.3 Food and beverage floorspace capacity (sqm gross) – (cumulative)

Area	2025	2028	2033
Zone 1 - Colwyn Bay	43	229	454
Zone 1 - Old Colwyn	10	58	116
Zone 1 - Rhos-on-Sea	17	88	174
Zone 1 – Conwy Central sub-total	**69**	**176**	**743**
Zone 2 - Abergele	17	91	176
Zone 2 - Kinmel Bay	3	22	44
Zone 2 – Conwy East sub-total	**20**	**113**	**220**
Zone 3 - Llanrwst	22	91	171
Zone 3 - Other Conwy	36	171	328
Zone 3 – Conwy Rural sub-total	**58**	**262**	**500**
Zone 4 - Conwy	45	250	488
Zone 4 - Craig Y Don	4	25	50
Zone 4 - Deganwy	6	29	56
Zone 4 - Llandudno	68	394	770
Zone 4 - Llandudno Junction	19	78	150
Zone 4 - Llandudno Junction, out of centre	0	0	0
Zone 4 - Llanfairfechan	1	7	13
Zone 4 - Penmaenmawr	2	10	20
Zone 4 – Conwy West/ Creuddyn sub-total	**146**	**794**	**1,547**
Conwy County Borough total	**293**	**1,545**	**3,009**

Source: Table 9, Appendix 4

Summary

5.38 The combined floorspace projections from the capacity assessment appendices suggest an over-supply of floorspace in Zone 2 – Conwy East and Zone 4 – Conwy West / Creuddyn. The over-supply in Zone 2 – Conwy East is primarily due to the Asda store in Kinmel Bay. The over-supply in Zone 4 – Conwy West / Creuddyn is due to the projected decrease in the capacity for comparison goods floorspace.

5.39 In Zone 1 – Conwy Central and Zone 3 – Conwy Rural there is a small under-supply with the projected reduction in the capacity for comparison goods floorspace offset by a projected need for additional need for convenience goods and food/beverage floorspace.

Table 5.4 Summary of floorspace projections (sq.m gross) - Cumulative

	Convenience	Comparison	Food/beverage	**Total**
By 2025				
Zone 1 – Conwy Central	1,106	-618	69	**557**
Zone 2 – Conwy East	-2,853	-209	20	**-3,042**
Zone 3 – Conwy Rural	233	-136	58	**155**
Zone 4 – Conwy West	697	-4,200	146	**-3,357**
By 2028				
Zone 1 – Conwy Central	1,098	-617	376	**857**
Zone 2 – Conwy East	-2,859	-202	114	**-2,947**
Zone 3 – Conwy Rural	237	-127	262	**372**
Zone 4 – Conwy West	275	-4,128	794	**-3,059**
By 2033				
Zone 1 – Conwy Central	1,179	-573	743	**1,349**
Zone 2 – Conwy East	-2,814	-184	220	**-2,778**
Zone 3 – Conwy Rural	275	-110	500	**665**
Zone 4 – Conwy West	852	-3,835	1,547	**-1,436**

Source: Table 10 in Appendix 2, Table 9 in Appendix 3 and Table 9 Appendix 4.

6.0 Need for Other Town Centre Uses

Introduction

6.1 This section updates the needs assessment for other main town centre uses including commercial leisure, entertainment and cultural uses i.e., cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs.

The Town Centre Residential Market

6.2 Residential development can play an important role in ensuring the vitality of its centres and as such, it may be appropriate to encourage residential development on suitable sites to increase the amount of people living in and therefore supporting the town centre's services and facilities. A greater population could help to support the evening economy, particularly the food and beverage sector.

6.3 Whilst there is an aspiration for growing the residential offer in town centres, a lack of suitable sites suitable for new build market or affordable housing in their vicinity is a key barrier to growth.

6.4 The active housing associations are targeting previously developed land including former nursing home sites which are becoming more available because of the curtailment of operations due to COVID and economic viability issues. For example, Wales & West Housing have recently acquired a site at Water Street in Abergele and a substantial site in Bay View Road for an apartment development.

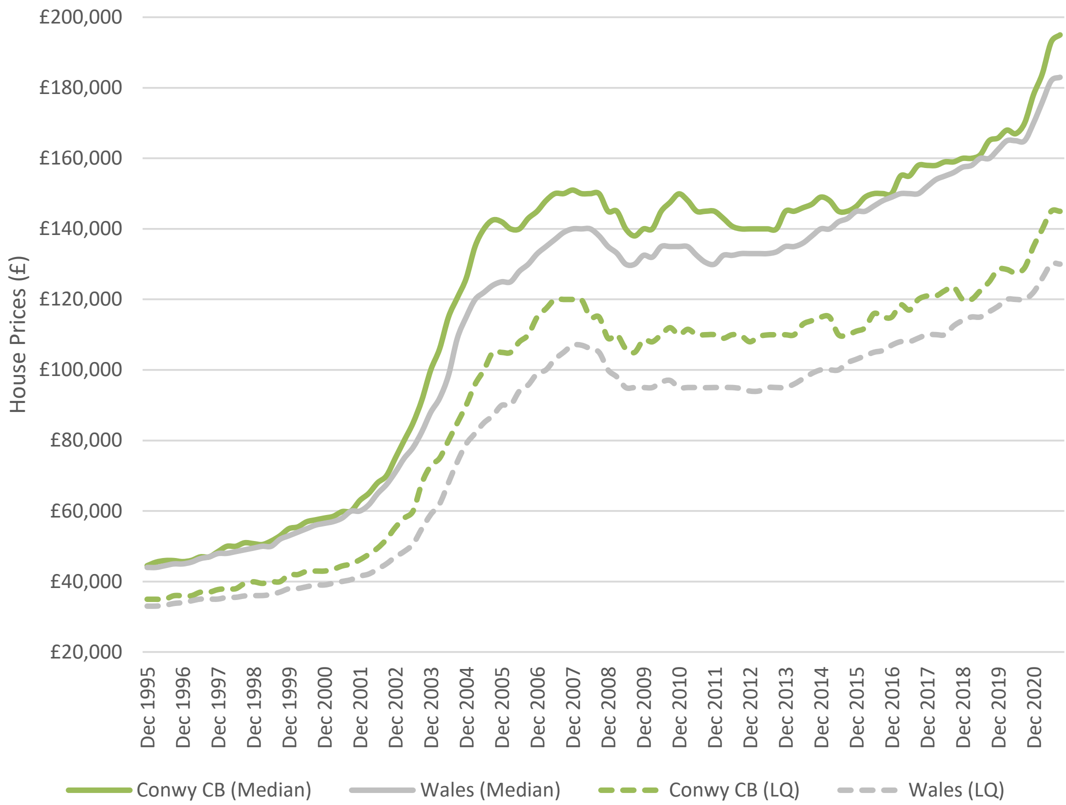
6.5 Agents reported that there is little or no appetite for the conversion of the upper parts of retail space into apartments mainly due to the cost of complying with building and fire regulations and the return on investment.

House Prices

6.6 House prices have increased strongly between 1995 and 2021 in the County Borough, with a particularly steep increase between 2001 and 2005 and again since the onset of the Covid-19 pandemic. This trend was mirrored across Wales as a whole, although the County Borough's prices are consistently higher. Median house prices remained relatively stable between 2005 and 2015 but since this time have started to creep upwards.

6.7 Figure 6.1 demonstrates that since 1995, median house prices in the County Borough have increased from just £44,500, to £195,000 in September 2021, an increase of 338% which outstrips the growth for Wales as a whole (with prices rising nationwide by 316% to £139,000). As can be seen in Figure 6.1, Lower Quartile [LQ] house prices have growth at a slightly lower rate both locally and nationwide. LQ prices are now £145,000 in the County Borough, higher than the £97,000 seen across Wales as a whole and have grown by 314% over that period.

Figure 6.1 Median and Lower Quartile house prices in Conwy County Borough and Wales from Dec 1995 to Sept 2021



Sources: HPSSA Dataset 9. Median house price for national and subnational geographies, quarterly rolling year, and HPSSA Dataset 15. Lower Quartile house price for national and subnational geographies, quarterly rolling year

6.8 Table 6.1 and Figure 6.2 present median, lower and upper quartile 'price paid' house prices in the County Borough, broken down by each of the 13 centres in the study for 2021. The data indicates that in general, house prices are lowest in Kinmel Bay and Craig-y-Don, although the latter has a very high number of high value properties that sold in 2021 resulting in a very wide range between LQ and UQ prices (further distorted by the relatively low number of properties changing hands overall in Craig-y-Don). Of the larger centres, Colwyn Bay consistently has lower house prices than the Borough-wide average, with median price paid equating to ££176,000 compared to £190,000 across the wider County Borough. Abergele's median house prices were at a very similar level to Colwyn Bay, although the LQ/UP prices formed a narrower range.

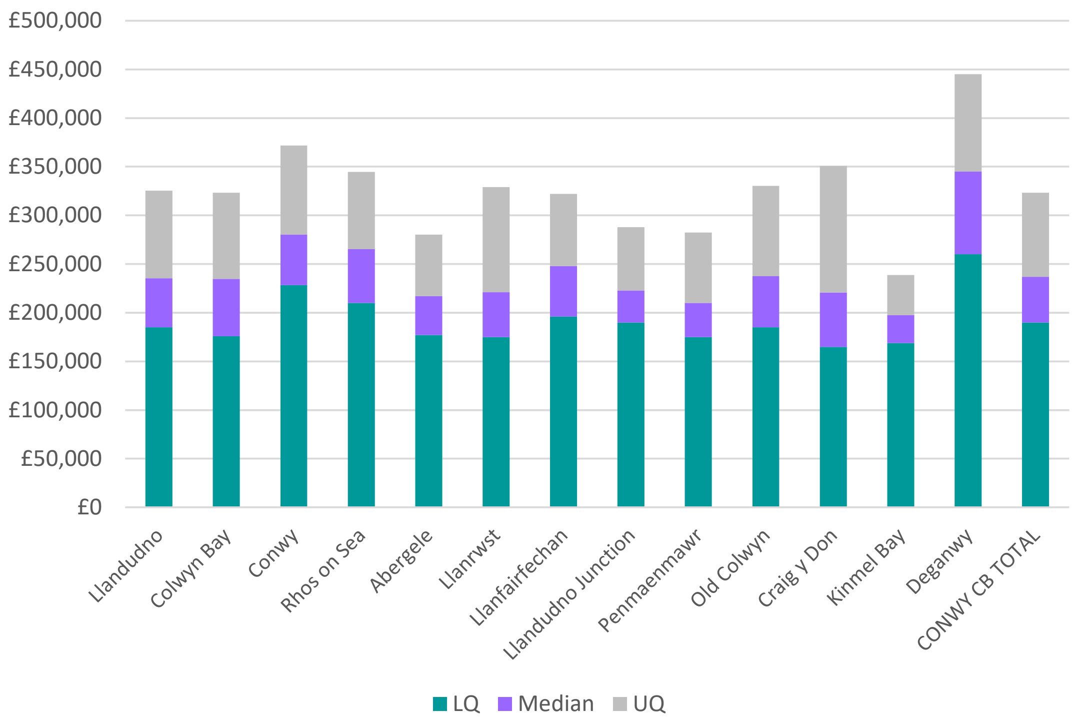
6.9 Llandudno's house prices are also slightly lower than the Borough-wide average, particularly at the lower end of the scale, whilst the town of Conwy consistently sees some of the highest house prices of all. The centre with the highest price paid prices is Deganwy, with very high median house prices of £26,000and UQ prices as high as £360,000.

Table 6.1 Median, Lower and Upper Quartile house prices (2021) – Conwy County Borough

	LQ	Median	UQ
Sub-regional centre			
Llandudno	£134,500	£185,000	£275,000
Town centres			
Colwyn Bay	£117,250	£176,000	£264,500
Conwy	£176,750	£228,500	£320,000
Rhos on Sea	£154,750	£210,000	£289,400
Abergele	£136,875	£177,000	£240,063
Llanrwst	£129,000	£175,000	£283,000
Llanfairfechan	£144,000	£196,000	£270,000
Llandudno Junction	£157,000	£190,000	£255,000
Penmaenmawr	£140,000	£175,000	£247,500
District centres			
Old Colwyn	£132,375	£185,000	£277,713
Craig y Don	£109,238	£165,000	£295,000
Kinmel Bay	£139,950	£168,750	£210,000
Local centre			
Deganwy	£175,000	£260,000	£360,000
Total	**£143,000**	**£190,000**	**£276,250**

Source: HM Land Registry (2021): Price Paid data

Figure 6.2 Median, Lower and Upper Quartile house prices (2021) – Conwy County Borough

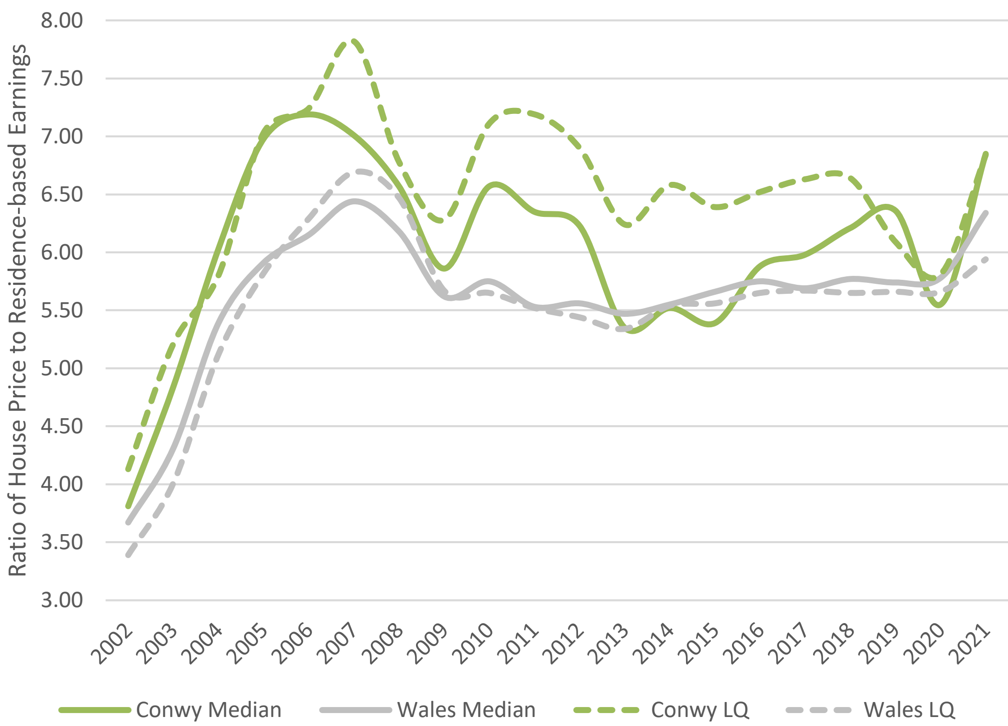


Source: HM Land Registry (2021): Price Paid data

Affordability

6.10 As shown in Figure 6.3, the ratio of median house price to median residence-based earnings in Conwy County Borough was 6.85 in 2021. This is higher than the median affordability ratio for Wales, which was 6.34 in 2021. Lower quartile affordability ratios in Conwy County Borough are now virtually identical to the median ARs, at 6.84, but until recently have been consistently higher and peaked at 7.82 in 2007. The increase in lower quartile affordability ratios in Conwy County Borough indicates that even the lower price houses may be unaffordable to those on lower incomes living in the County Borough. In general, affordability ratios have decreased since 2007 (with some fluctuations in between) although they have begun to increase again over the past year.

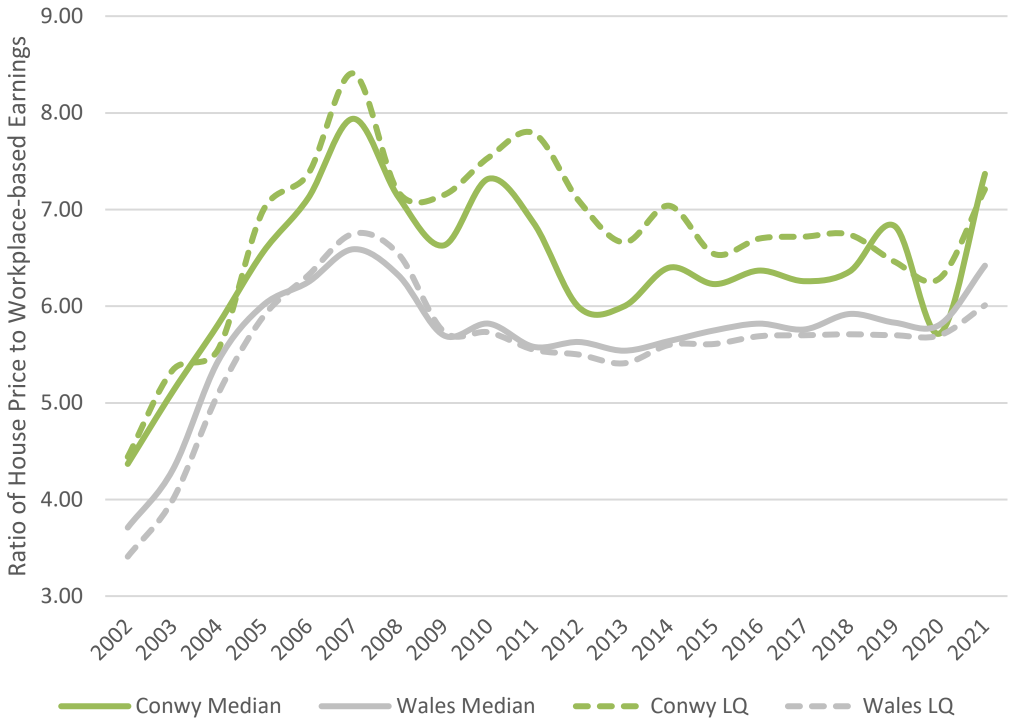
Figure 6.3 Residence-based Median/ Lower Quartile Affordability Ratios for Conwy and Wales



Source: ONS Ratio of House Price to Residence-based Earnings (Lower Quartile and Median)

6.11 Workplace-based affordability ratios are actually higher in the Borough than the residence-based ratios. In 2021, the ratio of median house price to median workplace-based earnings was 7.37 and the lower quartile ratio was 7.21 (Figure 6.4), significantly higher than the residence-based figures. Furthermore, the 2007 peak was even sharper, rising to 7.94 for the median AR and as high as 8.41 for the LQ AR. This indicates that even lower priced houses may be unaffordable to those on lower incomes working in Conwy County Borough. Workplace-based affordability ratios show the same trend as residence-based ratios over time, albeit at a slightly higher level.

Figure 6.4 Workplace-Based Median/ Lower Quartile Affordability Ratios for Conwy County Borough and Wales

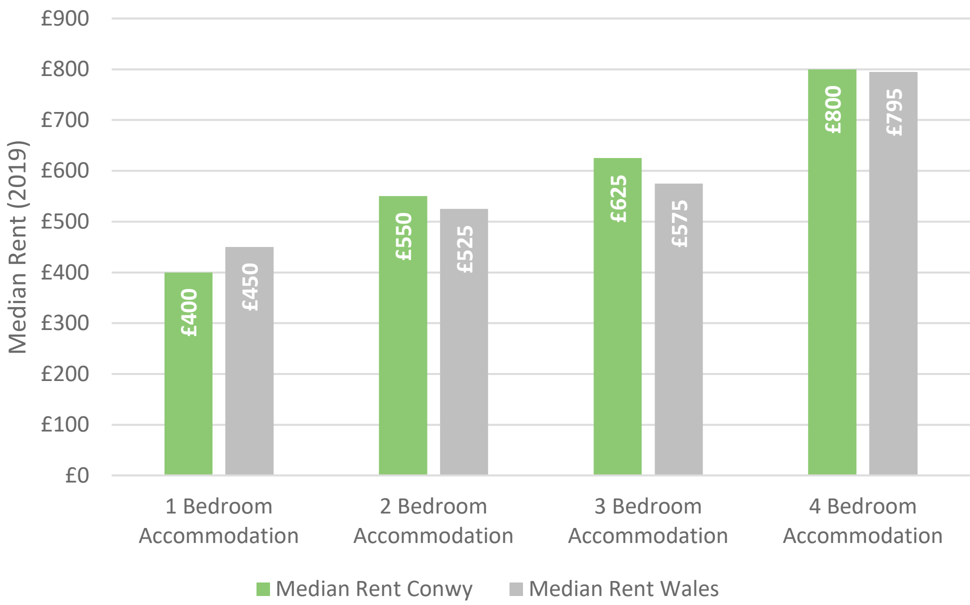


Source: ONS Ratio of House Price to Workplace-Based Earnings (Lower Quartile and Median)

Private Rental Market

6.12 High and increasing rents in an area are a further signal of stress in Conwy County Borough's housing market. Median rents in the Borough in 2019 for a 2-bed property were £550 per month, slightly higher than the £525 figure nationwide as can be seen in Figure 6.5. Median rental prices for 3 and 4-bed properties are also comparatively high in Conwy County Borough, at £625 and £800 respectively. Both figures are higher than the comparable figures for Wales as a whole, although the reverse is true for median rental levels of 1-bed properties.

Figure 6.5 Median monthly rental prices in Conwy and Wales (2021)



Source: StatsWales (2019) Private sector rents by local authority, 1 January to 31 December 2019

6.13 Table 6.2 compares private market rent levels across the County Borough for mean, median, LQ and UQ rates. In general, a similar pattern is observed for LQ/UQ and mean rents with the aforementioned median rental levels, with rental levels for larger properties commanding generally higher rental levels than the nationwide average, whilst rental levels for 1-bed smaller properties achieving a much lower level.

Table 6.2 Private Sector Rents (2019)

	Average Rent		Median Rents		LQ Rents		UQ Rents	
	Conwy	Wales	Conwy	Wales	Conwy	Wales	Conwy	Wales
1 Bedroom Accommodation	£413	£468	£400	£450	£348	£375	£459	£550
2 Bedroom Accommodation	£554	£549	£550	£525	£495	£450	£595	£600
3 Bedroom Accommodation	£633	£598	£625	£575	£575	£495	£695	£670
4 Bedroom Accommodation	£845	£856	£800	£795	£696	£650	£950	£1,000

Source: StatsWales (2019) Private sector rents by local authority, 1 January to 31 December 2019

6.14 These figures are only available at County Borough-wide level. A site search of properties for rent (excluding holiday lets) based on commercial property websites such as Rightmove was undertaken in mid-April 2022. This search found just 30 houses available to let, almost half of which related to 2-bed properties with the majority of the remainder 1-bed flats/apartments. There were just 6 properties on the rental market in the entire County-Borough offering 3 or more bedrooms.

6.15 In terms of rental levels by centre, Colwyn Bay had the most properties available to let (11), although these are clearly towards the bottom end of the scale in terms of costs, with average rents for a 1-bed property £457 a month compared to £583 pcm in Llandudno and as high as £750 pcm in Conwy. Rental levels for 2-bed properties are highest in Llandudno, followed by Rhos-on-Sea and then Craig-y-Don, and lowest in Abergele. The handful of properties on the rental market offering 3 and 4 beds is so limited that it is difficult to draw any meaningful conclusions by centre.

Table 6.3 Private sector mean rents per calendar month (April 2022)

	1 bed	2-bed	3-bed	4-bed
Sub-regional centre				
Llandudno	£583 (3)	£1,138 (2)	£850 (1)	-
Town centres				
Colwyn Bay	£457 (5)	£681 (4)	-	£975 (2)
Conwy	£750 (1)	-	£825 (1)	-
Rhos-on-Sea	-	£893 (4)	-	-
Abergele	-	£575 (1)	£845 (1)	-
Llanrwst	-	-	-	-
Llanfairfechan	-	-	-	-
Llandudno Junction	-	-	£695 (1)	-
Penmaenmawr	£425 (1)	£725 (2)	-	-
District centres				
Old Colwyn	-	-	-	-
Craig-y-Don	-	£875 (1)	-	-
Kinmel Bay	-	-	-	-
Local centre				
Deganwy	-	-	-	-
Total	**£521 (10)**	**£819 (14)**	**£804 (4)**	**£975 (2)**

Source: Various Commercial Rental Property Websites
(Number of properties for rent in brackets)

Care Homes

6.16 Experian population figures for 2020 indicate 28.1% of the resident population in the County Borough is aged 65 or older, compared with 21.1% in Wales as a whole. StatsWales projections suggest the proportion of residents aged 65 and older will increase from 21.1% in 2020 to 24.7% in 2033. A 3.6 percentage point increase in the proportion of 65 and older residents in the County Borough would be a 5,200 increase by 2033, which could create opportunities for further care home provision.

6.17 The Requirements List provides information on operator demand for care homes. No specific requirements were identified in Conwy County Borough, but providers actively seeking opportunities across Wales are as follows:

- Torsion Care, care homes and retirement living;
- Danescroft, care development company (25,000 sq.ft);
- Audley Retirement, retirement villages (120,000 sq.ft);
- Mayfield Villages, retirement villages and properties (250,000 sq.ft);
- Aspire LPP, care home developers (30,000 sq.ft);
- Frontier Estates, care homes provider (30,000 sq.ft);
- Anchor Hanover, care homes provider (30,000 sq.ft);
- Churchill Retirement, retirement housing (0.4 – 2.5 acres); and,
- Perseus, care home operator.

6.18 Care home providers generally require relatively large development sites capable of accommodating buildings ranging from 2,500 sq.m to over 10,000 sq.m.

Commercial Leisure Uses

6.19 Experian local expenditure data for the study area and projections indicates the resident population generated £17.07 million in 2020 (an average of £144 person) on selected cultural, recreational and sporting services, broken down as follows:

- cinema admissions £1.63 million;
- live entertainment i.e., theatre/concerts/shows £3.61 million;
- museums, theme parks, houses and gardens £1.61 million;
- admissions to clubs, dances, discos, bingo £1.56 million;
- other miscellaneous entertainment £2.89 million;
- subscriptions to sports and social clubs £3.02 million; and,
- leisure class fees £2.75 million.

6.20 As indicated in Section 5, the Steam Final Trend Report for 2008 – 2019 indicates to the County Borough's tourist visitors generated direct recreation related expenditure of £53.35 million, which boasts overall available expenditure to over £70.4 million. These figures suggest tourist visitors could generate about 75% of all cultural and recreational expenditure available in the County Borough.

6.21 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by 3.2% between 2022 to 2025, 6.7% between 2022 to 2028 or 11.5% between 2022 to 2033. These growth projections suggest an additional +£2.2 million could be generated by 2025, or +£4.7 million by 2028, or +8.1 million for these activities in the County Borough. This additional expenditure could support about 1,100 sq.m of new commercial leisure and cultural floorspace by 2025, based on £2,000 per sq.m., increasing to 2,300 sq.m by 2028 and 4,000 sq.m by 2033. Based on population growth, this new floorspace could be distributed as follows:

Table 6.4 Commercial leisure and cultural floorspace projections (cumulative)

	By 2025	By 2028	By 2033
Zone 1 - Conwy Central	300	600	1,100
Zone 2 – Conwy East	200	400	700
Zone 3 – Conwy Rural	200	400	600
Zone 4 – Conwy West/Creuddyn	400	900	1,600
Total	**1,100**	**2,300**	**4,000**

6.22 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

6.23 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate is about 2.6 trips per person per annum. The number of trips during the on-going Covid-19 crisis will have reduced significantly. This cinema assessment assumes trip levels will return to pre-Covid levels in the future (2.6 trips per person per annum).

6.24 The Cinema Advertising Association identifies 843 cinema facilities with 4,596 screens. Lichfields' national CINeSCOPE model identifies approximately 800,000 cinema seats in the UK. The CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 38,000 cinema trips per screen per annum or 220 trips per seat per annum.

6.25 Cinema provision in the County Borough is 10 screens with 2,008 seats, as follows:

- Theatr Colwyn, Colwyn Bay (1 screens / 375 seats); and
- Cineworld, Llandudno (9 screens / 1,633 seats).

6.26 The resident population within the Conwy study area in 2022 (118,878 people) plus tourists (50,300 on average each day) would generate around 440,000 cinema trips per annum, based on the UK average visitation rate (2.6 trips per annum). Population growth to 2033 suggests the number of trips would increase to 447,000 trips.

6.27 Adopting the UK average population per cinema screen (38,000 trips per screen), implies that 440,000 trips generated in the County Borough could support just over 11 cinema screens. In terms of seats, the UK average (220 trips per seat) suggests 440,000 trips could support 2,000 seats, compared with the existing provision of 2,008 seats. These projections suggest nearly 12 screens, or 2,032 seats could be supported.

6.28 These projections suggest there is limited capacity for additional cinema provision in the County Borough. Furthermore, the longer-term impact of the Covid-19 on the number of cinema trips may reduce this theoretical capacity.

Theatres, nightclubs, live music and other cultural activities

6.29 The UK Theatre and Society of London Theatres [SOLT] indicated their member organisations (223) presented nearly 63,000 performances attracting over 34 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue was£5.7 million. The UK average attendance per performance is 545.

6.30 Experian's local expenditure data indicates the resident population in the study area generates only £3.61 million on live theatre, concerts and shows. However, tourist visitors could increase this expenditure to over £14 million, assuming 75% of expenditure is generated by tourist visitors.

6.31 Assuming the UK average ticket revenue per venue (£5.7 million) these figures suggest there is capacity for 2 venues in the County Borough. There could be scope for additional provision over and above Venue Cymru in Llandudno.

6.32 The nightclub/live music sector (not including music halls) has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing. These trends may limit the demand for additional nightclub/live music facilities in the County Borough.

6.33 Experian's local expenditure data indicates the resident population in study area generates only £1.61 million on museums, theme parks, houses and garden. However, tourist visitors could increase this expenditure to over £6.4 million, assuming 75% of expenditure is generated by tourist visitors. Population growth and expenditure growth could increase this expenditure to £7.2 million. This £0.8 million increase in expenditure could support additional facilities in the County Borough.

6.34 There is a potential quantitative capacity for additional cultural facilities in the County Borough. The development strategy needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

Health and Fitness Clubs

6.35 The 2019 State of the UK Fitness Industry Report revealed that the UK health and fitness industry was continuing to grow pre-Covid. In 2019 there were more than 10 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The sector has more clubs, members and a greater market value than ever before. The 2019 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2019, with an increase of 4.7% in the number of memberships and 2.9% growth in the number of facilities. The UK had over 7,200 health and fitness clubs in 2019, an average of one club per 9,300 people.

6.36 As indicated above, the study area population generates £3.02 million on subscriptions to sports and social clubs. The UK average is around 6 fitness stations per 1,000 people. The resident population within the Conwy study area in 2022 (118,878 people) plus tourists (50,300 on average each day) could generate demand for 1,008 fitness stations.

6.37 Demand for additional facilities within Conwy County Borough should arise from future population growth and/or increased participation rates. Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by 11.5% between 2022 to 2033, which is likely to include an increase in participation rates. With resident population growth (+2.4%) expenditure on this activity should increase from £3.02 million to £3.45 million by 2033, an additional +£0.43 million. Based on the UK average of about £10,000 revenue per fitness station, this additional resident expenditure could support 43 new fitness stations by 2033, or a medium sized facility.

Tenpin bowling and other indoor leisure innovations

6.38 Across the UK freed-up retail space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for trampolines, climbing and indoor golf etc. The innovations are likely to continue, and a flexible approach is required to respond to arising opportunities.

6.39 The study area population (118,878 people in 2022) could theoretically support 10 tenpin bowling lanes, based on one lane per 12,000 people (UK average). There was previously a tenpin bowling alley in Llandudno at Mostyn Champs, which is now a TK Maxx store. However, tenpin bowling facilities in neighbouring authorities may limit operator demand. There is an 18-lane bowling alley in Wrexham, 24-lane bowling at Cheshire Oaks and 8-lane facilities in Prestatyn and Flint.

6.40 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.

6.41 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms. This sector is still relatively new and its potential for continued growth is unclear. The strategy for Conwy should be flexible to respond to any emerging demand for trampoline centres.

Bingo, Games of Chance and Gambling

6.42 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

6.43 The Gambling Commission indicates there were 601 bingo facilities in Great Britain (August 2020) and 131 casinos. The number of bingo premises fell by over 15% between 2014 to 2020, due in part to the increase in on-line bingo. The latest figures equate to approximately one bingo facility per 110,000 people, and one casino per 480,000 people. Population in the study area including tourist visitors

6.44 The resident population within the Conwy study area in 2022 (118,878 people) plus tourists (50,300 on average each day) is theoretically sufficient to support at 1 to 2 bingo facilities, based on the GB average. There is one bingo facility in County Borough i.e., Palace Bingo at Towyn, Abergele. There is Apollo Bingo also in Rhyl and Caernarfon. There may be theoretical scope for a further bingo facility in the County Borough, although the decline in the number of bingo premises across the country and the increase on-line gambling suggest there may limited operator demand to open new facilities.

Public Services

6.45 Discussions with agents revealed there is currently limited demand from public service organisations for space in Conwy, but also that the demand can come in waves. Recently, Betsi Cadwaldr University Health Board have enquired about taking some office space at Plas Eirias, whilst the Police have enquired about acquiring new training space albeit in St Asaph, Denbighshire rather than Conwy. Neither of these requirements have come to fruition despite engagement from the relevant estates teams. This does however indicate that options for new space have recently been explored, albeit not in town centre locations. However, if the council offered good quality town centre space such as part of Coed Pella in Colwyn Bay, there may be interest.

Summary

6.46 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g. exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 10-15 years.

6.47 In global terms future expenditure from the resident catchment population and tourist visitors could support about 1,100 sq.m of new commercial leisure and cultural floorspace by 2025, increasing to 2,300 sq.m by 2028 and 4,000 sq.m by 2033. This additional floorspace could for example include:

- a medium sized health and fitness facility;
- museums or art galleries;
- a bingo club.

6.48 The development strategy for these uses should be flexible to respond to emerging opportunities for new leisure, entertainment and cultural related facilities.

7.0 Llandudno Town Centre

Introduction

7.1 Llandudno Town Centre is designated as a Sub-Regional Shopping Centre in both the *Adopted Local Development Plan* and the *Replacement Local Development Plan – Preferred Strategy*, at the top of the hierarchy of centres in the plan area.

7.2 Llandudno serves as the largest coastal centre in Conwy and the Borough's main tourist location. The town is famous for its large North Shore pebble beach with promenade and 19th century pier, and has a wide range of hotels, cafes, restaurants, and shops. These areas are easily accessible from the town centre. The town is known as a tourist destination primarily for older visitors and as a day trip location for families. The town's tourist activity is however highly seasonal, with many hospitality establishments closing for the quieter winter months. The town is further characterised by its 19th century shopping arcades, three to four storey terraced buildings and the cliffs of Great Orme headland to the north.

Figure 7.1 Llandudno's North Shore beach, pier and Great Orme headland

7.3 The main retail area of the town lies along Mostyn Street, which runs parallel to the promenade, as well as Lloyd Street and the A546, both of which run perpendicular to Mostyn Street. Mostyn Street features a wide range of shops, cafés, restaurants, supermarkets, shopping arcades and until recently Marks and Spencer's which served as the largest department store in the Town. Meanwhile the promenade is dominated by four-storey Victorian terraced buildings, the majority of which serve as bed and breakfasts and hotels.

7.4 Madoc Street also serves as a secondary retail area with many converted residential units and includes much of the A2 professional services in the town. There are also a small number of office uses in converted residential buildings around Trinity Square. Llandudno railway station lies to the south of the main retail centre. To the east of the railway station there is an Asda superstore alongside the Parc Llandudno and Mostyn Champneys retail parks; the former now houses the relocated Marks and Spencer's store.

Figure 7.2 Llandudno Town Centre boundary and potential development/improvement sites

Source: Lichfields

Llandudno Tourism Study

7.5 The Llandudno Tourism Study provides a detailed review of the Town's tourism offer and performance over recent years. It finds that the tourism sector in Llandudno has performed strongly, with around 2.84 million day visitors in 2017 and 26,000 international visitors in 2016. Between 2008 and 2015 overnight trips increased by 19.2% to reach 423,000. The total economic impact of tourism in the Town was around £384 million in 2017.

7.6 However, the report also finds that the area faces new challenges in an increasingly competitive market and must continue to be proactive in planning and adapting to change. This includes moving towards a more experience-driven offer whilst embracing technology and new working patterns to diversify the centre.

7.7 The report's recommendations include providing new experiences, encouraging more high-quality independent retailers; diversifying the food offer to include more restaurants and bars; boosting the night-time economy; exploring the possibility of new major winter events; and, marketing to more diverse audiences.

Llandudno as a retail and service destination

7.8 Llandudno town centre has 310 retail and service units, excluding the retail parks to the east of the centre. The diversity of uses within Llandudno Town Centre is set out in Table 7.1, compared with the Goad Plan UK average and the average for all centres in Conwy County Borough. The mix of uses within Llandudno's retail parks is shown in Table 7.2.

Table 7.1- Mix of shops/service uses in Llandudno town centre

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	119	38.4	31.9	29.0
Convenience goods retail	21	6.8	8.7	9.7
Financial/professional services	25	8.1	7.7	9.0
Restaurants/cafés	49	15.8	10.7	10.0
Pubs/bars	16	5.2	4.6	4.9
Hot food takeaways	7	2.3	5.7	6.2
Other non-retail services	41	13.2	17.4	16.5
Vacant	32	10.3	13.4	14.7
Total	**310**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021.

7.9 Llandudno Town Centre has a higher proportion of comparison retail uses, restaurants/café and pubs/bars compared with the UK and Conwy averages, reflecting the centre's role as the major shopping and tourist destination in the County Borough. The centre has a significantly lower proportion of hot food takeaways and other non-retail services. There were 32 vacant retail units within the centre at the time of Lichfields' survey (October 2021), a vacancy rate lower than the UK average. There were six vacant units on the retail parks, but the former Debenham's unit on the retail park was being fitted out for occupation by Marks & Spencer.

7.10 Llandudno (including the retail parks) has an excellent selection of comparison shops (143), reflecting its role in the retail hierarchy. There are a further 24 comparison goods outlets on the retail parks just to the east of the designated town centre. All Goad comparison categories are represented and the choice of outlets in most categories is good (five or more outlets). Table 7.3 provides a breakdown of comparison units by category.

Table 7.2 - Mix of shops/service uses in Llandudno retail parks

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	24	66.7	31.9	29.0
Convenience goods retail	2	5.6	8.7	9.7
Financial/professional services	0	0.0	7.7	9.0
Restaurants/cafés	1	2.8	10.7	10.0
Pubs/bars	0	0.0	4.6	4.9
Hot food takeaways*	1	2.8	5.7	6.2
Other non-retail services	2	5.6	17.4	16.5
Vacant	6	16.7	13.4	14.7
Total	**36**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021.
*A McDonalds' drive thru.

Table 7.3 - Mix of comparison goods shops – Llandudno town centre and retail parks

Type	Number units	% units	UK average
Clothing and footwear	33	23.1	21.5
Furniture, carpets and textiles	11	7.7	7.7
Books, arts, cards and stationers	11	7.7	6.1
Electrical, music and photography	7	4.9	9.3
DIY, hardware and homeware	4	2.8	6.9
China, glass and gifts	9	6.3	5.5
Cars, motorcycles and accessories	1	0.7	1.3
Chemists, drug stores and opticians	9	6.3	12.0
Variety, department and catalogue	8	5.6	1.7
Florists, nurserymen and seedsmen	2	1.4	2.2
Toys, hobby, cycle and sports	14	9.8	5.5
Jewellers	8	5.6	5.1
Charity and second-hand shops	13	9.1	10.0
Other comparison goods retailers	13	9.1	5.2
Total	**143**	**100.0**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021.

7.11 Llandudno has a particularly good provision of gift shops, variety stores and toys/hobby outlets. The town has a relatively low provision of electrical, DIY/Hardware and chemists/opticians. Llandudno has a reasonable number of multiple comparison stores (excluding charity shops), supported by a wide selection of independent comparison traders. The multiple comparison retailers include those listed in Table 7.4.

7.12 Llandudno has an extensive range and choice of service uses (138 in total), by far the highest in the County Borough, as shown in Table 7.5. The representation in most categories differs from the national average. There are high proportions of restaurants/cafés and pub/bars due to the high number of tourist visitors. Conversely there are low proportions of other non-retail services, although the choice in each category is still extensive.

Table 7.4 – Llandudno's comparison multiples (including the retail parks)

Argos	Edinburgh Woollen Mill	O2	The Body Shop
B & M Bargains	EE Phones	Oak Furniture Land	The Entertainer
B&Q	Halfords	Pandora	The Fragrance Shop
Blacks	Harveys/Bensons Beds	Peacocks	The Works
Bon Marche	Home Bargains	Pets at Home	TK Maxx
Boots	JD Sports	Poundland	Vision Express
Card Factory	Lloyds Pharmacy	Primark	Vodafone
Claires	M&Co	River Island	Warren James
Clarks	M&S	Savers	Waterstones
Clinton Cards	Mountain Warehouse	Smyths Toys	WH Smith
Currys	New Look	Specsavers	Wilko
DFS	Next	Sports Direct	Wren Kitchens
Dreams Beds			

Source: Lichfields' land use survey October 2021

Table 7.5- Mix of service uses – Llandudno town centre

Type	Number units	% units	UK average
Restaurants/cafés	49	40.8	24.0
Fast food/takeaways	7	5.8	14.9
Pubs/bars	16	13.3	11.8
Banks/other financial services	17	14.2	8.4
Betting shops/casinos/amusement	3	2.5	3.8
Estate agents/valuers	5	4.2	7.8
Travel agents	1	0.8	1.5
Hairdressers/beauty parlours	21	17.5	26.3
Launderettes/dry cleaners	1	0.8	1.7
Sub-total	**120**	**100.0**	**100.0**
Other	18		
Total	**138**		

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average.

Retail catchment area and length of stay

7.13 The household survey results indicate over 91% of respondents across the study area had used shops and services in Llandudno during the last year. The next highest centre was Colwyn Bay at 59% of respondents. Over 95% of respondents living in the local area (Zone 4) had visited the centre. The centre lowest market share was nearly 83% in Zone 2 – East. Over 43% of study area respondents indicated that they do most of their non-food shopping in Llandudno including the retail warehouse parks. The next most popular destination was Colwyn Bay where only 7% of respondents indicated they most of their non-food shopping at that destination.

7.14 The retail capacity analysis suggests Llandudno attracts only 36% of its trade from the local Zone 4 (Conwy West/Creuddyn). Llandudno attracts significant levels of trade from all four study area zones as well as tourist visitors from beyond the study area.

7.15 The household survey results indicate about 72% of respondents using the centre stay for more than an hour and the average length of stay is 98 minutes. Llandudno has the longest length of stay in the County Borough. Conwy has the next highest average (78 minutes).

Shop rental levels

7.16 According to the VOA, Zone A retail rents vary throughout the centre. Along the main shopping thoroughfare Zone A retail rents on Mostyn Street range from £170 to £750 per sq.m, with the higher end achieved in the prime pitch between Trinity Square and Lloyd Street. Within the Victoria Centre, Zone A retail rents are slightly lower ranging from £280 to £350 per sq.m. The town centre has the highest prime retail rental levels of the main centres in the County Borough. Within the peripheral shopping streets Zone A retail rents range from £150 to £210 per sq.m and are much more affordable accommodation for small independent traders.

7.17 Retail rents on the retail warehouse parks area higher. The overall rents (note no Zone A rents available) at Parc Llandudno ranges from£300 to £640 per sq.m. Rents are lower at Mostyn Champneys ranging from £185 to £215 per sq.m.

Public transport linkages

7.18 Llandudno Train Station sits just south of the Town Centre on Augusta Street. The station has three platforms and is operated by Transport for Wales Rail [TfWR], who currently run all trains servicing the station. TfWR operate an hourly service to Manchester Piccadilly via Colwyn Bay, Rhyl, Prestatyn, Flint, Chester and Warrington, with certain trains on this route instead heading to Crewe and some extending on to Manchester Airport. An hourly shuttle to Llandudno Junction is usually in operation, with Llandudno Junction providing services to Bangor & Holyhead, Birmingham New Street, London and South Wales. There are also four trains per day along the Conwy Valley line terminating at Blaenau Ffestiniog. From December 2022, Avanti West Coast will reintroduce a direct service to London Euston during summer months.

7.19 The centre has several bus stops along the Major roads within the centre, including Mostyn Street, Trinity Square, Lloyd Street and the A546. Services generally run eastwards along the North Wales Expressway via Colwyn Bay, Westwards via Conwy, or southwards via Llandudno Junction towards Betws-y-Coed.

Car parking

7.20 There are ten pay & display car parks within Llandudno offering around 1,600 spaces. The Victoria Shopping Centre Car Park offers a further 366 spaces. There is also short-term paid street parking along most major roads within the centre including along the Promenade. Prices are typically around £1.00 for an hour stay and between £4.20- £10.00 for 24 hours.

Levels of crime

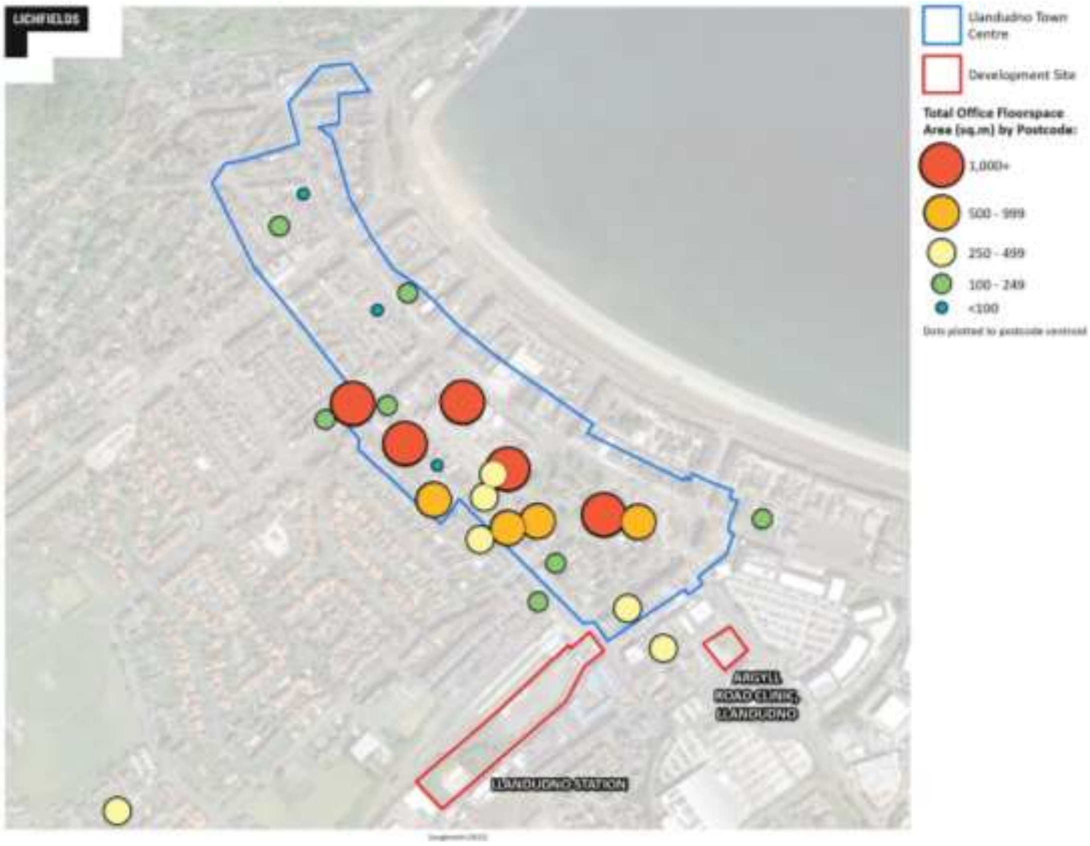
7.21 There were 3,466 crimes reported in Llandudno in the year to March 2022, indicating a crime rate of 157.5 crimes per 1,000 people. This is higher than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period and is the 3rd highest rate of crime of the towns assessed in this study[2].

[2] Based on the LL30 postcode area which also includes Craig-Y-Don. https://www.ukcrimestats.com/Postcode_Districts/LL30/

Llandudno as an Employment Centre

Quantum, Types and Quality of Existing Floorspace

Figure 7.3 Provision of office floorspace in Llandudno



Source: VOA / Lichfields

7.22 The main office area is in and around Trinity Square which contains a broad range of traditional converted space which is freehold, long leasehold and tenanted accommodation, many with dedicated parking areas.

7.23 A review of the VOA database shows that there is around 14,200 sqm of office space within the main centre of Llandudno[3]. Trinity Square, Lloyd Street, Madoc Street, Mostyn Street, Vaughn Street and Augusta Street account for most of the office properties within the Centre.

7.24 There are very few purpose-built office spaces within the town centre, with the few that do exist being in public buildings such as the library and town hall. Most office units in the town are in large converted Victorian residential units, many of which now act as multiple occupation business centres.

7.25 The town has many small individual office units in multiple occupation properties, with units of 100sqm or below accounting for around 4,500 sqm. Most of these smaller units are within properties in the Trinity Square area, as well as Lloyd Street and Augusta Street. Most of the larger office spaces within Llandudno are within public buildings such as the second floor of the Library on Mostyn Street and the Town Hall.

[3] This data includes only E(g)(i) (formerly B1a) office use and excludes high street E(c) (formerly A2) financial and professional services retail frontages. It does however record connected office uses situated above E(c) retail frontages.

7.26 The only obvious purpose-built office in the Town Centre is at 18 Trinity Square and currently serves as the head office for Boots Hearingcare.

7.27 CoStar data shows that there is no office space in Llandudno centre rated as four- or five-star for quality, with most units rated as two or three out of five. This is likely since most office space within the town is located within old and often former residential properties which have been converted to office use.

Representation of Businesses

7.28 Private sector office use in Llandudno is dominated by accountants, solicitors, insurance brokers, financial advisors, and other similar businesses. There is also a minor presence of E(e) medical and health service use.

Office Rental Levels

7.29 Whilst data on office rents is limited, CoStar data indicates an average rent of around £120 per sqm in the Town Centre. Rents are generally highest in units close to Mostyn Street, with one unit on Mostyn Street itself commanding around £350 per sqm. Rents are generally lowest around Trinity Square and Augusta Street, where rents fall in the region of £75 - £100 per sqm.

Stock Vacancy and Turnover

7.30 The limited CoStar data available indicates that there is no office space currently vacant or being marketed as available within the main centre of Llandudno in March 2022. Walking around the centre, no obvious vacant units were apparent indicating a very low vacancy rate amongst properties currently listed as in office use. This would suggest that the town has a lower rate of office vacancy than Conwy or Wales, which have vacancy rates of 3.7% and 5.6% respectively as of March 2022.

7.31 However, there are several vacant residential units in areas such as Trinity Square which could be converted to office use dependent on ownership and planning constraints.

Public Services

7.32 Llandudno Town Council is based in the Town hall building on Lloyd Street. The Local Authority have spare capacity in both the Library Building on Mostyn Street and the Town Hall. Both are serviced by pay and display parking. The main health provision is at Mostyn House Medical Practice and Argyll Road Clinic. There is also a Swimming Centre located on Mostyn Broadway.

Operator Requirements

7.33 In terms of retail, occupier requirements have been obtained by Lichfields from the Requirements List as of 26th May 2022. Llandudno has the highest number of requirements of any town in the County Borough, with 6 potential occupiers seeking the following units:

- Lidl 18,000 to 26,000 sq.ft
- Pizza Hut Delivery 650 to 2,100 sq.ft
- Poundstretcher 6,000 to 30,000 sq.ft
- Dominos 850 to 2,500 sq.ft
- The Range 15,000 to 30,000 sq.ft (store expected to open at Parc Llandudno)
- Age UK 3,000 to 15,000 sq.ft

7.34 Otherwise, Richard Baddeley & Company is aware of some demand for Llandudno which may be met in the two vacant M&S Units although there are few other vacant units in the town. Of the occupiers not mentioned above, there is also currently demand from Carpetright who are likely to look for a site out-of-centre and the Original Factory Shop.

7.35 There is little demand for offices within the town, the economy of which is driven by the retail offer and hospitality, food, and beverage outlets.

Customer views

7.36 As part of the household survey, respondents were asked if they had used shops and services in Llandudno in the last year. Of those who had used shops/services in Llandudno, respondents were asked what they like and dislike about Llandudno Town Centre.

7.37 On balance levels of satisfaction were positive. Only 11% indicated there was nothing they like about the centre compared with 51% who indicated there was nothing they dislike about the centre. The different (40 percentage points) was the third highest behind Llanrwst (59) and Conwy (46), suggesting a high overall level of satisfaction with the centre.

7.38 About 31% of respondents like Llandudno because of its good range of shops. The main factors mentioned (5% of respondents or more) were:

- *factors liked*: good range of shops (31%); good choice of shops (19%); nice shopping environment (14%); close to home (12%); good quality shops (14%); close to home (12%); choice of places to eat (6%); habit/familiarity (6%) and friendly atmosphere (5%).
- *factors disliked*: hard to find car parking (19%) and too many vacant shops (6%).

7.39 Llandudno town centre rates relatively highly in terms of the range and choice of facilities.

Business Views

7.40 Llandudno accounted for the highest share of business survey respondents, with 31 businesses or 33.7% of respondents from the area filling out the survey. 14 of these (45.2%) were in the hospitality sector, whilst 7 (22.6%) were in retail.

7.41 A number of businesses responded with regards to their short- and long-term plans:

- A number of hospitality and retail businesses indicated that they intend to refurbish or improve parts of their premises.
- A few hospitality businesses mentioned planning applications they had submitted for outdoor seating or additional outdoor seating.
- A creative/digital business stated that they are looking to expand their business but cannot due to a lack of affordable office and small-scale premises.

7.42 Businesses were also asked to comment on factors affecting business performance and strengths / weaknesses of the Town Centre. These responses are summarised below:

- Many respondents mentioned the lack of footfall and fall in tourism in the post-Covid environment, with some of these indicating that elderly people are still anxious and the extended restrictions in Wales such as mask-wearing in shops may have affected town centre footfall.
- Some hospitality businesses however stated that increased staycations have meant a strong start to 2022 in terms of bookings.

SWOT Analysis

Strengths

- Llandudno is the largest shopping centre in the County Borough. The centre has a large sub-regional catchment area.
- The town centre and seafront provide an attractive historic environment, which is a pleasant place to visit.
- Llandudno is an attractive coastal town and major tourist destination. Visitors to the seafront and Great Orme headland provide spin off trade for the rest of the town centre, including the high concentration of restaurants, pubs/bars and leisure/entertainment uses.
- The theatre at Venue Cymru attracts visitors to the town and supports the evening economy.
- The centre has a high proportion of comparison goods shops and restaurant/cafés and there is a good balance between national multiple and independent operators and a wide range and choice of shops.
- There is a good range of service facilities, including banks, building societies, estate agents and other services.
- The shop vacancy rate is below the Country and UK averages, although the vacancy rate is higher within the retail parks.
- The office vacancy rate is very low, which suggest supply and demand are balanced.
- Llandudno has the longest average length of stay in the County Borough for customers using the centre.
- Prime retail rents are the highest in the County Borough, which with the lower-than-average vacancy rate, suggests demand for space is reasonably strong. There are more affordable properties in peripheral areas.
- On balance, the centre has relatively high levels of customer satisfaction, particularly of terms of the range and choice of facilities and shopping environment.
- The centre has good public transport links i.e., rail and bus.
- Accessible car parking provision with large surface car parks including provision at retail parks within easy walking distance.
- The main shopping area has relatively wide pavements and is safe for pedestrians. The public realm is reasonable quality.

Weaknesses

- Llandudno is a relatively long linear centre, with some barriers to pedestrian movement e.g. at Gloddaeth Street and at Vaughan Street.
- Tourism in Llandudno and Conwy generally remains highly seasonal, with reduced footfall during winter months.
- The shop unit sizes are primarily narrow and limited in size due to the historic nature of the centre. This limits the possibility for larger format stores. However, there are large vacant premises available on the retail parks.
- The sense of arrival at the railway station is relatively poor and could be improved as a gateway to the town centre.
- There is limited good quality office space in the centre, with very few purpose-built units.

- The town has a relatively high crime rate compared with other towns in the County Borough.

Opportunities

- As a popular tourist destination, there is an opportunity to improve and strengthen the evening/night-time economy.
- Increased 'staycation' demand could increase the number of tourist visitors to the town and seafront, providing spin off benefits to shop and services in the town centre.
- Future population and expenditure growth provides an opportunity to strengthen shops, services and leisure facilities to consolidate Llandudno's role in the sub-region.

Threats

- Continuing national market difficulties and increase on-line shopping could reduce operator demand for space in the centre.
- The historic character of the main shopping area could restrict the ability to attract modern retailers/operators due to the lack of larger format stores.
- The longer-term impact of Covid-19 and Brexit may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies.
- National trends have led to multiple chain stores restructuring their portfolios, which may increase vacancy levels and reduce footfall.
- The relocation of the Marks and Spencer store may reduce footfall, affecting businesses in that part of the centre.

Llandudno – Option Development

Regeneration Objectives and Rationale for Intervention

7.43 As the sub-regional centre and primary tourist location of the County Borough, Llandudno performs strongly across many factors. The centre has good provision and variety of comparison retail as well as restaurants, bars and cafes leading to the town having the longest length of stay for tourists of any centre in this study at 98 minutes. The town has a strong core audience in retirees and the elderly, who frequent the many hotels and B&Bs along the promenade and sustain much of the more traditional food and drink offer. There is therefore a need to maintain and improve the current offer for the benefit of this core market.

7.44 There are however some challenges facing the town, including the centre being highly seasonal, difficulties in attracting families and younger people and struggling to capitalise on the tourism offer by securing overnight stays and providing things to do in bad weather.

7.45 As noted in the Llandudno Tourism Study, the centre is likely to continue to perform well in terms of its current offer and primary audience but exists in an increasingly competitive market and must continue to be proactive in planning and adapting to change. This includes moving towards a more experience-driven offer whilst embracing technology and new working patterns to diversify the centre and its visitors.

7.46 As such, interventions should seek to expand upon and diversify this offer to attract new audiences, particularly younger people and families, as well as improving on the offer catering to existing audiences. This should include providing a broader range of activities and experiences and strengthening the night-time economy by expanding the eating and drinking offer.

7.47 The centre has a relatively high level of vacancy and properties in poor states of repair, minimal greenery and green space, and in some areas wide paving that may allow for increased outdoor seating. There is therefore an opportunity to improve the general look and feel of the centre and capitalise on the existing boulevard-style streets to provide a more European experience to the benefit of current and new audiences. There is also potential to experiment with measures such as partial pedestrianisation, traffic-calming measures and allowing businesses to use parking bays as seating areas to support this.

7.48 There are also opportunities to create a more positive journey through the centre for people arriving by train, and ultimately people moving through the centre towards the promenade and pier.

7.49 Finally, Llandudno is an ongoing success story and a seaside town that has braved the Covid-19 pandemic relatively well. An increased appetite for staycations and the rise of social media in promoting visits to historic towns amongst young people provides an opportunity to market the town to new audiences.

7.50 Objectives for Llandudno can be broadly defined as follows:

- Improve the range of experiences on offer to cater for younger people, families, wet weather, and evenings;
- Diversify the food & drink offer including a market;
- Improve connections from the station to the centre, and the centre to the promenade/pier;
- Improve the look and feel of the centre; and,
- Leverage the success and potential of the town into positive marketing.

Improve the range of experiences on offer to cater for younger people, families, wet weather, and evenings

7.51 Despite the relatively long average stay by visitors, Llandudno town centre's current offer is geared towards daytime activities best enjoyed in good weather such as the promenade, the pier, cafes, fish and chips, and shopping. A common theme in the business survey responses was that the town remains highly seasonal and dependent on dry weather, with little to attract families and younger visitors to remain in the centre during evenings and ultimately encourage overnight stays.

7.52 Similarly, it is commonly accepted that town centres in general are benefitting from moving away from being anchored around traditional retail and instead moving towards experiences and activities. This can reduce seasonality, reduce the reliance on good weather and help to fill the gaps between eating and drinking and in turn encourage longer stays and higher overall spend.

7.53 An online search for things to do in Llandudno generally returns a number of activities on the Great Orme, the Promenade, the Pier, other out-of-centre outdoor locations or viewing points, and shopping: all activities which require daylight and good weather or are unlikely to attract younger audiences and families to stay into the night. Examples of activities that may fill such a gap if centrally located would include a bowling alley, cinema, indoor adventure golf, video game arcades or game bars, escape rooms and other activities that can fill a few hours during bad weather or before an evening meal.

Diversify the food & drink offer

7.54 Llandudno already supports a relatively good food and drink offer, but there is room for improvement, particularly when aspiring to cater for younger audiences and families with children.

7.55 There is a high representation of larger and well-established Italian restaurants as well as traditional British or Bistro-style restaurants with a more traditional feel. Similarly, there is high share of chain cafes and bakeries etc. when compared to other centres with more boutique feels such as Conwy.

7.56 There is also limited choice in terms of modern restaurants that can transition from more casual breakfast/lunch sittings through to evening menus and extended stays for pre- and post- dinner drinks popular with younger audiences such as cocktails and craft beers.

7.57 In terms of food and drink there is therefore an opportunity to encourage smaller independent offerings, a wider range of cuisines suited to a younger audience, and larger establishments that cater to multiple sittings and eating/drinking experiences throughout the day.

7.58 Finally, opportunities should be explored to find space for more permanent market and street-food style offerings. These can provide small, short-term premises for local independent food and drink traders and are increasingly popular with families and younger audiences who wish to try a range of food and drink in a casual setting.

Improve connections from the station to the centre, the centre to the promenade, and on to the Great Orme

7.59 Llandudno benefits from excellent rail connectivity, however the station sits in a relatively quiet area of the centre, with little in terms of an immediate draw towards Mostyn Street and the seafront. The experience for visitors arriving by train could be improved in several ways. The signage drawing rail visitors along Vaughan Street towards the North Western Gardens and through to Mostyn Street could be improved, whilst efforts should be made to ensure Vaughn Street has a vibrant mix of uses that draw footfall. The small greenspace at North Western Gardens could also be further linked to the train station through extended greening along Vaughn Street as well as improvements to seating and street furniture to give the impression of a more cohesive corridor leading to Mostyn Street and towards the seafront.

7.60 The Great Orme headland has much to offer in terms of both natural beauty and some of Llandudno's primary tourist attractions, but the journey from the Prince Edward Square and Pier area around the headland could be improved. Signage from the centre to the Great Orme and its attractions is relatively poor and the route along Happy Valley Road beside the Grand Hotel does not do anything to draw incidental visitors around the headland. Improving these links as well as the general feel of moving from the centre to the headland would improve the experience for families as well as encouraging longer stays for daytime visitors.

Improve the look and feel of the centre

7.61 Llandudno is a relatively attractive centre thanks to the abundance of Victorian architecture, wide Boulevard style streets and the famous promenade and pier. Possible areas for improvement would be in filling and refurbishing vacant units that have fallen into disrepair, as well as facilitating better maintenance of existing lower-value shops in certain areas such as those near to the North Western Gardens and along Madoc Street.

7.62 Whilst the centre generally has wide pavements that cater well to elderly and disabled visitors, the quality and consistency of the pavement surfacing in many areas could be improved, as well as allowing for updates to and rationalisation of street furniture to allow for increased seating and greening along the main shopping streets.

7.63 The draft TEP Green Infrastructure Conwy Project recommends that for Llandudno Town Centre there should be a particular focus on the main shopping street and connecting this with the rail station, as well as enhancing connectivity to the seafront. Recommendations are summarised in Figure 7.4, but include:

- **Gloddaeth Street Gateway:** reduce carriageway to single lane and incorporate dedicated cycle provision; rationalise on-street parking and introduce tree planting; improve pedestrian crossings; replace central reservation parking with tree planting, green space and SuDS rain garden planting to continue green avenue and soften built environment. Provide outdoor dining areas through movable planters to define seating areas and encourage outdoor dining.
- **Mostyn Street**: Key shopping street dominated by vehicles and parking in need of increased priority for pedestrians and cyclists. Remove parking on one side of street and introduce dedicated two-way cycle route. Reinstate historic tree avenue planting and reinforce existing trees through carriageway narrowing and rationalising parking. Improve pedestrian crossings and enhance outdoor dining areas through movable planters to define seating areas and encourage outdoor dining. De-clutter street and remove unnecessary street furniture and pedestrian guard rails and consider the use of raised planters with integrated seating to increase dwell time.
- **Western Gateway Market Street:** Define gateway to town centre through enhanced GI and pedestrian priority. Reduce extent of hardstanding at roundabout and increase GI to create a better entrance to the town that is more pedestrian focused and human scale. Consider creating shared space scheme to define entrance gateway.

Figure 7.4 TEP Draft Green Infrastructure Masterplan for Llandudno Town Centre

Source: TEP (2022): Transforming Towns Green Infrastructure Project – Conwy Opportunities

Site Specific Development / Improvement Opportunities

7.64 Llandudno centre is highly constrained in terms of land site availability. Three potential development sites were identified in Llandudno, all of which site outside or overlap with the town centre boundary:

<u>Builder Street</u>

7.65 The largest site identified in Llandudno is the Builder Street site adjacent to the station. The site comprises around 1.6 ha of previously developed land which lies in between Llandudno Station and Builder Street and extends into the Builder Street employment area.

7.66 The site was allocated in Conwy's LDP as an employment site under policies EMP/1 and EMP/2.

7.67 However, this site has now received planning permission (0/48144) and is underway for a scheme of 77 one, two, three and four- bedroom affordable homes to rent aimed at both families and over 55s.

<u>Argyll Road Clinic</u>

7.68 This site constitutes approx. 0.2 ha of previously developed land located on the corner of Argyll and Conwy Road opposite the Parc Llandudno Retail Park, to the southeast of the town centre boundary. The site was previously in use as a health clinic which was demolished in 2019/2020.

7.69 Based on discussions with commercial agents it is understood that the site is owned by Mostyn Estates and has been earmarked for use as a Car Showroom with a Planning Application being validated by the Council in November 2021 (0/49156), although no decision has yet been made.

Llandudno Pier Pavilion Site

7.70 The final site identified in Llandudno constitutes the former Pier Pavilion site, which has laid empty since the Pavilion burned down in 1998. The site has proven to be controversial, having been previously earmarked for the development of luxury apartments and restaurants with the most recent application facing a call-in request to Welsh Government planning inspectors.

7.71 However, in November 2021 the site was put up for auction and acquired by the owner and operator of Llandudno Pier, Adam Williams, who has stated that the site will be incorporated into the pier to expand its tourism and leisure offer.

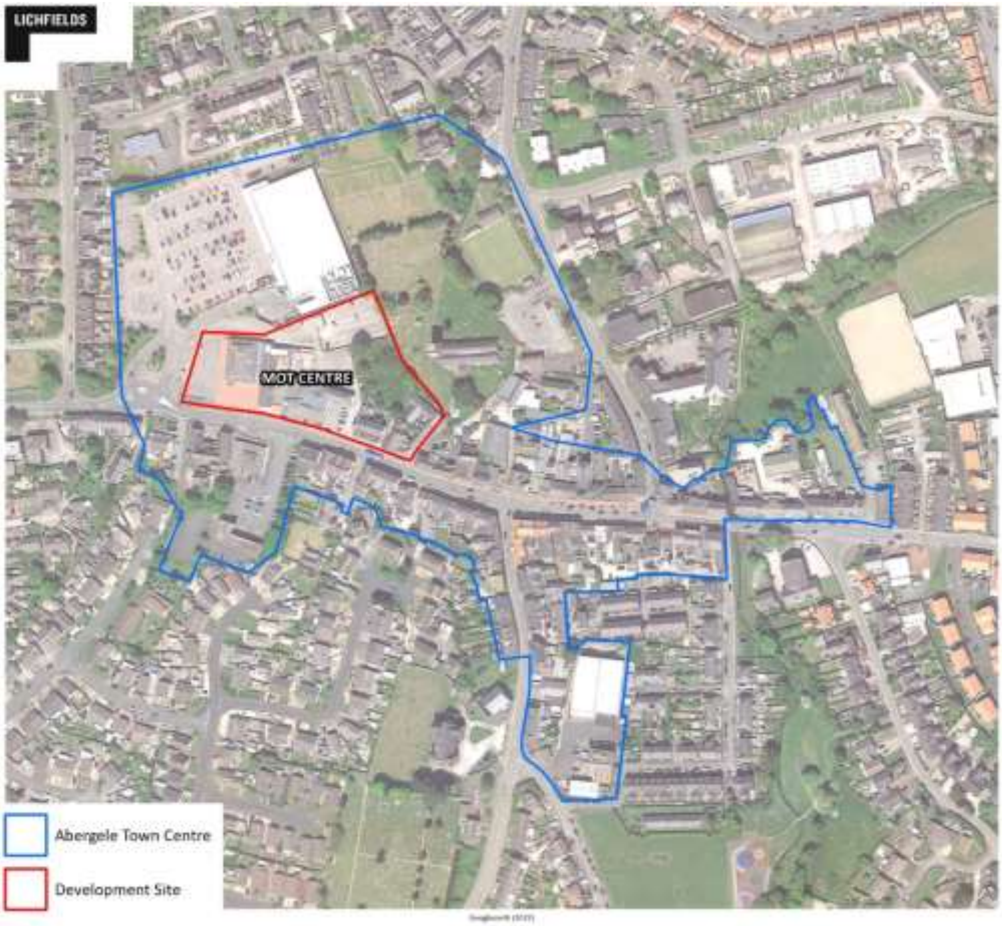
8.0 Abergele Town Centre

Introduction

8.1 Abergele town centre is designated one of five Town Centre in the Conwy Replacement Local Development Plan – Preferred Strategy. It was also designated as a Town Centre in the Adopted LDP. It is a second-tier centre in the hierarchy of centres in the County Borough, below the Sub-Regional Shopping Centre at Llandudno.

8.2 Abergele's main retail and commercial centre is focussed on the main road of Market Street as well as a short stretch of Chapel Street and includes a Tesco Superstore site. The centre also includes a large site formerly occupied by an MOT centre, car showroom and pub/hotel adjacent to the Tesco Superstore which is due to be redeveloped as a mixed commercial and affordable housing development.

Figure 8.1 Abergele town centre and proposed development/improvement sites



Source: Lichfields

8.3 After being hit by the Covid lockdown in 2020, the small town received the news late in the year that 'I'm a Celebrity' would relocate its next series from the usual Australia to Gwrych Castle nearby. This led to several new independent business owners taking a chance and opening on the high street, as well as a providing a boost to tourism, use of local venues and spend in local pubs, cafes, restaurants, and shops.

8.4 Most of the office floorspace in the town is within North Wales Technology Park which is edge of centre. The Park also includes 150 new dwellings, a medical centre and a broad range of office occupiers and healthcare operators.

Abergele as a retail and service destination

8.5 Abergele town centre has 90 retail and service units. In terms of the number of retail service uses it is the fourth largest centre in the County Borough. The diversity of uses within Abergele is set out in Table 8.2, compared with the Goad Plan UK average and the average for all centres in Conwy County Borough.

Table 8.1 Mix of shops/service uses in Abergele town centre

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	20	22.2	31.9	29.0
Convenience goods retail	9	10.0	8.7	9.7
Financial/professional services	7	7.8	7.7	9.0
Restaurants/cafés	6	6.7	10.7	10.0
Pubs/bars	6	6.7	4.6	4.9
Hot food takeaways	6	6.7	5.7	6.2
Other non-retail services	23	25.6	17.4	16.5
Vacant	13	14.4	13.4	14.7
Total	**90**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021

8.6 Abergele has a relatively low proportion of comparison retail uses and restaurants/café, but a high proportion of other non-retail services, particularly hairdressers and beauty salons. This mix of uses reflects the centre's role as a lower order centre serving a relatively localised catchment area. There were 13 vacant retail units within the centre at the time of Lichfields' survey (October 2021), a vacancy rate comparable to the UK average, but slightly higher than the County Borough average.

8.7 Abergele has a small selection of comparison shops (20 outlets) and not all of the Goad comparison categories are represented, and the choice of outlets other categories is limited (four or less outlets). Table 8.3 provides a breakdown of comparison units by category.

Table 8.2 Mix of comparison goods shops – Abergele town centre

Type	Number units	% units	UK average
Clothing and footwear	4	20.0	21.5
Furniture, carpets and textiles	4	20.0	7.7
Books, arts, cards and stationers	0	0.0	6.1
Electrical, music and photography	0	0.0	9.3
DIY, hardware and homeware	2	10.0	6.9
China, glass and gifts	2	10.0	5.5
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	2	10.0	12.0
Variety, department and catalogue	0	0.0	1.7
Florists, nurserymen and seedsmen	1	5.0	2.2

Type	Number units	% units	UK average
Toys, hobby, cycle and sports	1	5.0	5.5
Jewellers	0	0.0	5.1
Charity and second-hand shops	2	10.0	10.0
Other comparison goods retailers	2	10.0	5.2
Total	**20**	**100.0**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021

8.8 Lloyd Pharmacy is the only multiple comparison retailer, supported by small independent comparison traders.

8.9 Abergele has a reasonable range of service uses (48 in total), the second highest in the County Borough, as shown in Table 8.4. The proportion of hairdressers and beauty parlours is particularly strong, but the provision of restaurants/cafés is relatively weak.

Table 8.3 Mix of service uses – Abergele town centre

Type	Number units	% units	UK average
Restaurants/cafés	6	14.6	24.0
Fast food/takeaways	6	14.6	14.9
Pubs/bars	6	14.6	11.8
Banks/other financial services	2	4.9	8.4
Betting shops/casinos/amusement	1	2.4	3.8
Estate agents/valuers	3	7.3	7.8
Travel agents	0	0.0	1.5
Hairdressers/beauty parlours	16	39.0	26.3
Launderettes/dry cleaners	1	2.4	1.7
Sub-total	**41**	**100.0**	**100.0**
Other	7		
Total	**48**		

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021

Retail catchment area

8.10 The household survey results indicate nearly 28% of respondents across the study area had used shops and services in Abergele during the last year, second lowest figure for the six main centres, with only Llanrwst visited by a smaller percentage (19%). Nearly 75% of respondents living in the local area (Zone 2 - East) had visited the centre. The centre's lowest market share was 12% in Zone 4 – West. Less than 2% of study area respondents indicated that they do most of their non-food shopping in Abergele, but this was still the third highest figure in the County Borough behind Llandudno and Colwyn Bay.

8.11 The retail capacity analysis suggests Abergele attracts 54% of its trade from the local Zone 2. A reasonable proportion (30%) comes from tourist visitors. Abergele has a relatively localised catchment area but attracts a reasonable number of tourist visitors.

8.12 The household survey results indicate about 69% of respondents using the centre stay for less than an hour and the average length of stay is only 59 minutes. Abergele has the second shortest average length of stay in the County Borough, behind Llandudno Junction (53 minutes).

Retail rental levels

8.13 The VOA's latest Zone A retail rents indicate the highest prime pitch Zone A rents achieved in Abergele are £220 per sq.m. This rental level is achieved in the central section of Market Street. In peripheral parts of the centre Zone A rents range from £130 to £165 per sqm, providing more affordable accommodation for small independent traders.

Public transport linkages

8.14 The closest train station is Abergele & Pensarn, located approximately 1km from the centre. On weekdays, the station is served by an hourly service in each direction on the Manchester to Llandudno route operated by Transport for Wales. Intermittent services from Holyhead to Crewe/Cardiff Central/Birmingham International serve the station in evenings and at peak times. There are bus stations along Market Street and one serving the Tesco Superstore. Bus services run east and west along the coast, as well as southwards towards Llansannan and Llangernyw.

Car parking

8.15 There are two car parks in Abergele on Market Street (Tesco) and Water Street. Parking is free and supported by Abergele Town Council. On-street parking on Market Street is limited to 3 hours.

Levels of crime

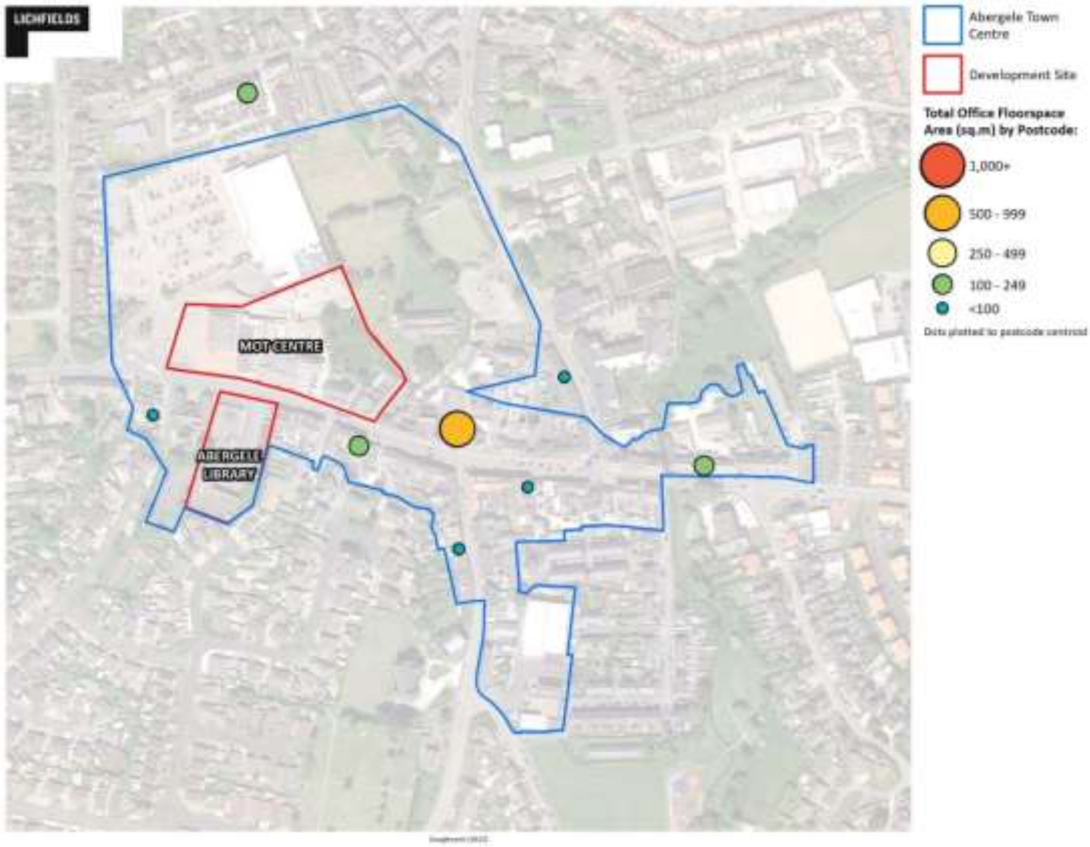
8.16 There were 434 crimes reported in Abergele in the year to March 2022, indicating a crime rate of 176.8 crimes per 1,000 people. This is higher than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period and is the 2nd highest rate of crime of the towns assessed in this study[4].

[4] https://www.ukcrimestats.com/Neighbourhood/5836

Abergele as an Employment Centre

Quantum, Types and Quality of Existing Floorspace

Figure 8.2 Provision of office floorspace in Abergele



Source: VOA / Lichfields

8.17 There is little office use within Abergele's main centre, with VOA data indicating around 1,450 sqm of office use along the main stretch of Market Street as well as Chapel Street, Bridge Street and Water Street. These are almost all 1st and 2nd floor units, with some ground floor E(c) uses on the high street. The largest of these is around 200 sqm at 10 Market Street. There is also around 220 sqm of office across multiple units at Oak House, which is located within the centre boundary just north of St Michael's Church cemetery but is quite isolated relative to the centre overall.

8.18 There is around 5,100 sqm of office space across multiple units located at North Wales Business Park which is located approx. 1km west of the centre along the A547. The Business Park has expanded in recent years meaning this is likely to be an underestimate of the total office space. It offers small short-term units as well as larger units of up to 2,500 sq ft (232 sqm) which can include bespoke fit-outs for occupiers. There is, however, no further expansion land available at the park.

8.19 Based on the limited CoStar data available for Abergele, the small number of office spaces within the main centre are all within the one- to three-star rating band for quality. Office units at North Wales Business Park are three-star quality.

Representation of businesses

8.20 Most of the visible office use within the centre of Abergele are related to accountants, solicitors, insurance brokers, and other similar businesses e.g. funeral directors.

Stock Vacancy and Turnover

8.21 Of the few visible office units within Abergele's centre, one second floor unit previously occupied by an insurance broker was vacant. However, a review of commercial property websites did not find any available units within the centre. Meanwhile a number of newly completed units at North Wales Business Park are listed for lease across various websites.

Rental Levels

8.22 CoStar indicates current market rents of around £85 per sqm within Abergele's centre and a ten-year average of around £80 per sqm. Rents for the units at North Wales Business Park sit at around £100 per sqm.

Public Services

8.23 The only public service provision in the town is the local Library which has a dedicated car park and has the potential for re-development for residential or commercial use.

Operator Requirements

8.24 In terms of retail, occupier requirements have been obtained by Lichfields from the Requirements List as of 26th May 2022. There are two potential occupiers for the town, seeking the following units:

- Lidl 18,000 to 26,000 sq. ft
- Tool Station 2,750 to 6,000 sq. ft

8.25 Otherwise, Richard Baddeley & Company considers that should a suitable site come forward agents consider there would potentially also be interest from Aldi based on the local demographic.

Customer views

8.26 As part of the household survey, respondents were asked if they had used shops and services in Abergele in the last year. Of those who had used shops/services in the town, respondents were asked what they like and dislike about the town centre.

8.27 On balance levels of satisfaction were mixed. Around 22% indicated there was nothing they like about the centre compared with 40% who indicated there was nothing they dislike about the centre. The difference (18 percentage points) was the second lowest behind Colwyn Bay (8), which suggests relatively low levels of satisfaction in Abergele.

8.28 Over 20% of respondents like Abergele because of it is close to home, which emphasises the importance of the centre's local role. The main factors mentioned (5% of respondents or more) were:

- *factors liked*: nice shopping environment (14%), friendly atmosphere (8%); good range of shops (8%); compact centre (6%); good independent shops (6%); and.
- *factors disliked*: nothing/none mentioned (40%); traffic/congestion (14%); hard to find car parking (12%); poor range of shops (10%); poor choice of shops in general (5%).

8.29 Abergele rates most favourably in terms of environmental factors, independent shops and friendly atmosphere. It rates less favourably in terms the overall range and choice of shops and services, traffic congestion and car parking.

Business Views

8.30 The business survey received nine responses from businesses based in Abergele. A summary of the main points regarding the town is provided below:

- Respondents mentioned the lack of footfall in the centre, which when coupled with business rates and increasing supplier and energy costs are significantly harming turnover.
- It was noted that some firms are located within old buildings which are in need of refurbishment and would like to relocate.
- One respondent stated that they would like to find new premises within the town centre but there is nothing affordable available.
- Multiple respondents indicated that the Tesco and parking at one end of the high street has unbalanced the centre and reduced footfall at the other end.
- Multiple respondents also mentioned the poor general state of many high street buildings and the number of vacant units which require prohibitive investment to be brought back into use.
- The number of independent businesses in the centre is seen as a positive aspect of the centre.
- In terms of how to improve the centre, several suggestions were made, including:
  - Improving the façade and state of buildings;
  - Filling empty properties;
  - Improving general look/feel of centre with planting etc.;
  - Better signage for free shopper's car park and introduction of time limit to stop workers parking there; and,
  - More town events and promotion through notice boards rather than social media.
- In terms of making use of empty premises, it was suggested that the centre needs a multiple store such as Primark or Home Bargains to attract customers, as well as more experiences and things to do in the rain such as bowling or children's activities.

"I feel the council should prioritise marketing individual town centres and what they have to offer. Each town has its own unique identity, and we need to capitalise on that, and what is on offer from not only a business, but a cultural and historic way to attract more people to visit. Then it is up to the businesses themselves to capitalise on this."

SWOT Analysis

Strengths

- The centre has a reasonable range of non-retail services, particularly pubs/bars and hairdressers/beauty parlours.
- The Tesco superstore is a significant anchor for the centre, catering for main and bulk food shopping.
- There is good provision of surface and on-street car parking.

Weaknesses

- Abergele is a relatively small and linear town centre.
- The centre has a low proportion of comparison goods outlets and a limited number of national multiples.
- The centre has a relatively localised catchment area.
- The shopping environment along Market Street suffers from relatively high levels of through traffic and narrow pavements in places.
- The Chapel Street/Market Street junction is congested.
- Shop units are primarily period buildings that are narrow and limited in size.
- Abergele has a relatively short average length of stay (59 minutes) for customers using the centre.
- On balance, the centre has mixed levels of customer satisfaction, particularly of terms of the range of shops, traffic congestion and availability of car parking.

Opportunities

- There are redevelopment opportunities at the western end of the centre.
- Increased 'staycation' demand could increase the number of tourist visitors to the town and seafront, providing spin off benefits to shop and services in the town centre.
- Improved linkages to Pensarn Beach could help attract more tourist visitors to the centre.
- Publicity from the I'm a Celebrity TV programme could generate more visitors.
- There is an opportunity to improve shops and services by utilising vacant premises.
- Future population and expenditure growth provides an opportunity to strengthen shops and services to improve Abergele's role.

Threats

- The polarisation of investment toward larger centres could reduce demand for premises.
- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators due to the lack of larger format units.
- The longer-term impact of Covid-19, Brexit and now the cost of living crisis may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies.

Abergele – Option Development

8.31 Abergele is a medium-sized centre which sees relatively high levels of traffic but has experienced declining footfall over recent years.

8.32 The centre has long been anchored to the Tesco Superstore at its western edge which draws significant amounts of road traffic through the town but leaves the centre somewhat unbalanced, with lower levels of footfall to the eastern side.

8.33 Perhaps as another effect of the Tesco, the high street has relatively low comparison and convenience shopping options and a high presence of non-retail services such as hairdressers and beauty salons. The centre has six pubs and bars which is high for its size but has a relatively weak offer in terms of restaurants and cafes, the latter of which may act as a draw along the high street for those shopping at Tesco.

8.34 The town has recently seen the completion of two new housing developments to the west and east of the town centre providing the opportunity to capture increased levels of footfall if the centre can improve its offer and attract longer stays.

8.35 The centre suffers from high levels of traffic congestion during rush hours from those commuting, doing the school run and shopping at Tesco, with the high street often full of slow-moving traffic in both directions, as well as queues on Chapel Street and Water Street. In addition, there is little car parking within the centre, with what spaces do exist often being at the expense of footpath width. There may be opportunities to give more pedestrian priority through traffic calming measures and rationalisation of parking along Market Street, whilst also making better use of dedicated car parks.

8.36 Aside from the Tesco, the western side of the centre is currently dominated by the c.1.0 ha site consisting of the former Slaters car garage, MOT centre and Bee Hotel which has been fenced off since the closure of Slaters in late 2018. This site presents an opportunity to establish a western gateway for the centre.

8.37 Abergele has a slightly higher level of vacancy than the Conwy average at 14.4%, however some of these buildings look to be long-term vacant, and several currently occupied buildings and shop fronts on the high street are in poor states of repair which detracts somewhat from the otherwise relatively pleasant feel of the centre.

8.38 Overall, objectives for Abergele include:

- Establish western gateway to the centre and improve linkages with Tesco;
- Better traffic and parking management; and,
- Improve the look and feel of the centre.

Establish western gateway to the centre and improve linkages with Tesco

8.39 Currently, the Tesco store and Slaters development site dominates the western approach into the town and there is little by the way of a defined entrance to the centre. Similarly, the Tesco feels disconnected from the high street, with no pedestrian linkages other than via the main entrance to the Tesco car park, which feels isolated from the main shopping area.

8.40 The Slaters site offers an opportunity to solve some of these issues, by establishing a clear entranceway to the town centre. In conjunction with the Abergele Library opposite, there is potential to form a western hub with more of a pedestrian focus, as well as providing pedestrian linkages through to Tesco.

8.41 Similarly, increased greening and signage around the roundabout and along this part of market street could help draw attention away from Tesco and into the centre for those arriving from the west.

Better traffic and parking management

8.42 The town centre suffers from high volumes of road traffic at peak times, which regularly sees queues of cars leading to the lights at Chapel Street and Water Street in all directions. This can give the centre a noisy and congested feel at these times, detracting from the area’s attractiveness to pedestrians and as a location for shopping and eating and drinking. Generally, these vehicles are using the town simply as a through-route and are not looking to stop and spend money within the centre.

8.43 Parking within the centre can also be difficult, with only a handful of on-street spaces along Market Street and the main car park on Water Street being small and poorly signposted from the centre. Parking on Market Street also comes at the expense of fairly narrow pavements and as a result an overabundance of street furniture in certain places. This all adds to a sense of car priority and general crowdedness along Market Street.

8.44 Traffic calming measures such as raised carriageways leading into and out of the centre, zebra crossings and other methods of managing intersections should be investigated in efforts to try and reduce congestion. In terms of parking, signage to Water Street should be improved and thought should be given to other potential suitable parking areas to help rationalise the existing parking areas along Market Street. This in turn may allow for higher street openness, improved pedestrian focus and a calmer atmosphere during peak times.

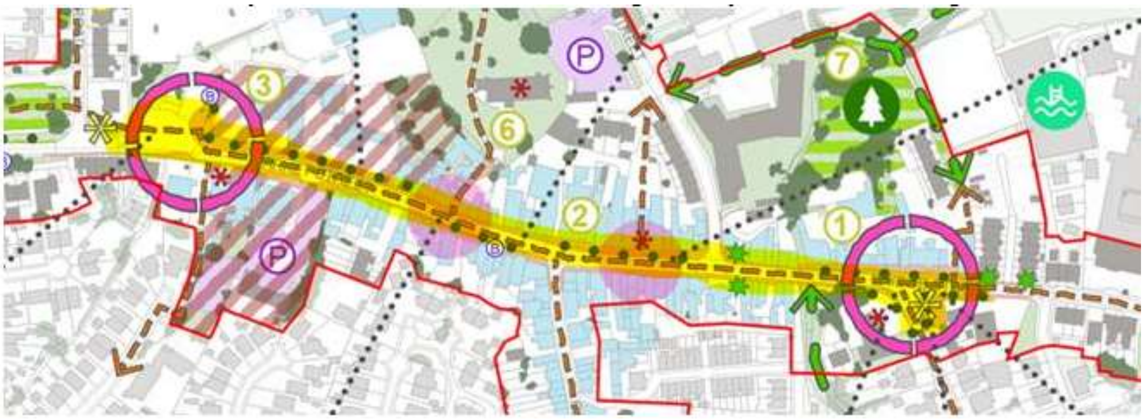
Improve the look and feel of the centre

8.45 Aside from addressing the vacant Slaters site and general congestion on both roads and footpaths, other ways to improve the look and feel of the centre should include refurbishment of buildings and shopfronts alongside improved greenery.

8.46 The draft TEP Green Infrastructure Conwy Project recommends that for Abergele Town Centre there should be a particular focus on the high street and gateways to the town. Recommendations are summarised in Figure 8.3, but include:

- **Eastern Gateway Bridge Street:** requires a greater sense of arrival to announce the town centre through traffic calming, gateway feature and greening. Improve interface and connectivity to River Gele corridor and links to Park Gele. Reduce carriageway width, introduce traffic calming to define the entrance to the town centre, increase walkways, rationalise parking bays and introduce tree and rain garden planting to create a green gateway.
- **Market Street:** Reduce carriageway width, increase walkways, rationalise parking bays, bus stops and taxi rank and introduce tree and rain garden planting where feasible. Reduce clutter and consider if lighting can be mounted on buildings.
- **Western Gateway Market Street:** Define gateway to town centre through enhanced GI and pedestrian priority. Reduce extent of hardstanding at roundabout and increase GI to create a better entrance to the town that is more pedestrian focused and human scale. Consider creating shared space scheme to define entrance gateway
- **Western Approach (Market St/Eldon Dr):** Introduce tree planting, display meadow and bulbs in existing grass verges along Market Street to tie in with existing trees and define approach to the town centre. Diversify existing amenity grass on Eldon Drive through introduction of tree group planting, shrubs, hedgerow and areas of meadow grassland and bulb planting. Include tree line parallel to wall along Market Street to define approach to town centre. Enhance access and setting to Gwrych Castle through tree and shrub planting.
- **Northern Connection Sea Road:** Diversify existing amenity grass on Sea Road through GI such as further tree planting, drainage swales with rain garden planting and bulbs.
- **Church St Green Link:** Strengthen green links north through St Michaels Church to Water Street bowling green and car park. Create greater sense of pedestrian priority.
- **The Mount:** Opportunity to enhance connections between Bridge Street and Water Street to The Mount through footway improvements, signage, greening.
- **Chapel Street:** Consider scope to increase footways, reduce carriageway width and calm traffic to create greater pedestrian priority.

Figure 8.3 TEP Draft Green Infrastructure Masterplan for Abergele Town Centre



Source: TEP

Site Specific Development Opportunities

<u>Former Slaters site</u>

8.47 This site consists of around 1 ha of land encompassing the old Slaters car garage and MOT centre as well as the Bee Hotel. The site has been vacant for several years and forms a large area in the western side of Abergele, situated between Market Street and the Tesco Superstore.

8.48 Based on local reporting, it is understood that the site has been acquired by Housing association Cartrefi Conwy, who have launched plans to redevelop the site for a mixed commercial and affordable housing development aimed at people aged over 55, along with improved community space and areas. However, at this stage no plans are publicly available, and no application has been submitted.

8.49 The site should not be viewed in isolation as it represents an opportunity to anchor the establishment of a western gateway to the town, potentially encompassing the Tesco roundabout as well as the library, youth centre and café opposite to create a western hub area. This should assist with encouraging people away from Tesco and along the high street, as well as providing links with the Tesco which is currently isolated from the centre despite its proximity.

8.50 In Lichfields' view the site offers a key development opportunity with potential to form a larger improvement area at the western boundary of Abergele Town centre. The site would suit a mixed-use scheme including elements of residential and commercial use, as well as potentially incorporating community and public sector uses. The site should also be utilised to better integrate the Tesco with the town centre and create a sense of pedestrian priority in this area of the town.

9.0 Colwyn Bay Town Centre

Introduction

9.1 Colwyn Bay town centre is designated one of five Town Centres in the Conwy Replacement Local Development Plan – Preferred Strategy. It was also designated as a Town Centre in the Adopted LDP. It is a second-tier centre in the hierarchy of centres in the County Borough, below the Sub-Regional Shopping Centre at Llandudno. Colwyn Bay is the largest of the five designated town centres.

9.2 Colwyn Bay's retail and commercial centre lies predominantly along Conway Road, a main road which runs east to west throughout the length of the area, as well as several smaller streets which run perpendicular from Conway Road towards the seafront. The foremost of these streets are Station Road and Penrhyn Street. Station Road is pedestrianised, features retail uses and connects the centre with Colwyn Bay train station and the Bay View Shopping Centre. Penrhyn Road has a relatively high share of independent cafés and eateries. The Bay View shopping centre also sits on the eastern side of the centre, which provides several small retail units as well as housing the town's larger convenience stores.

Figure 9.1 Properties on Conway Road, Colwyn Bay

9.3 In terms of office use, the Council's head offices are at Coed Pella on Conway Road represent the largest and most modern offices in the County.

9.4 Mostyn Road and Wynnstay Road include rows of former houses that have been converted to office use, with many buildings in multiple occupation or serving as business centres. These uses extend onto the southern side of Princess Drive.

Figure 9.2 Colwyn Bay town centre and potential development/improvement sites

Source: Lichfields

9.5 There have been various attempts to regenerate the town centre including, most recently, the construction of Coed Pella, but a lack of footfall and private investment remain key barriers. In the 1970s – 80s the town was fairly vibrant with a busy commercial centre for retail and offices. However, the pedestrianisation of Station Road, the primary shopping street is seen by some as a key reason for the fall of the town as a destination centre for shopping and the centre struggles to compete with Llandudno for the main high street brands.

9.6 A Townscape Heritage Initiative to replace shop fronts and enhance buildings in the Conservation Area envelope has successfully changed the visual street scene of the town centre but has had limited impact on new investment nor has increased rental levels to attract investors to commit funds for development.

9.7 Welsh Government funding in recent years has been targeted at the waterfront which has enhanced the leisure offer with new beaches and the Porth Eirias development.

The Heart of Our Town: Colwyn Bay Town Centre Review 2015-2019 (November 2019)

9.8 This report was prepared by the People & Places Partnership on behalf of the Council with the intention of recording and presenting key evidence about the current performance of Colwyn Bay Town Centre and track changes over recent years.

9.9 The analysis of Key Performance Indicators [KPIs] for Colwyn Bay trends in the report indicates fluctuating footfall with adequate parking, although businesses are still very vulnerable to localised changes and long-term economic trends. It also suggests that overall footfall has decreased around the town since 2015 and from peak levels in 2017. The data also suggests that parking availability has not been adversely affected by construction of the new Council offices and consequent reduction in space. Parking availability has consistently been around 32-33% over the last three years.

9.10 When businesses in Colwyn Bay were asked what two things that would improve the town centre the main issues related to parking, opportunities to improve the retail mix, marketing / events and the physical appearance of the town centre. There were proportionally fewer concerns about local, civic leadership and property cost compared to 2018.

9.11 When customers of Colwyn Bay were asked what two things would improve the town centre, the most popular responses related to the appearance of the town including a desire to fill empty premises. Parking improvements and calls for more diverse shops were also prominent responses.

Colwyn Bay Place Plan

9.12 The Bay of Colwyn Community Plan Team is about to start work on preparing a Place Plan that will inform and shape the future of this community. The Place Plan will cover the areas of Colwyn Bay, Old Colwyn, Rhos-on-Sea and Bryn-y-Maen and is currently consulting on the 'future Bay of Colwyn' under three initial themes: People, Community and Place.

Colwyn Bay as a shopping and service destination

9.13 Colwyn Bay town centre has 264 retail and service units, including the commercial uses just outside the designated shopping zone. The diversity of uses within Colwyn Bay is set out in Table 9.1, compared with the Goad Plan UK average and the average for all centres in Conwy County Borough.

Table 9.1 Mix of shops/service uses in Colwyn Bay town centre

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	82	31.1	31.9	29.0
Convenience goods retail	17	6.4	8.7	9.7
Financial/professional services	32	12.1	7.7	9.0
Restaurants/cafés	21	8.0	10.7	10.0
Pubs/bars	7	2.7	4.6	4.9
Hot food takeaways	16	6.1	5.7	6.2
Other non-retail services	41	15.5	17.4	16.5
Vacant	48	18.2	13.4	14.7
Total	**264**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average

9.14 Colwyn Bay's mix of uses is broadly consistent with the County Borough and UK averages, but there is a higher proportion of financial/professional services and a relatively low provision of convenience goods shops, restaurants/cafés, pubs/bars and other non-retail services. There were 48 vacant retail units within the centre at the time of Lichfields' survey (October 2021), a vacancy rate much higher than the County Borough and UK averages.

9.15 Colwyn Bay has a reasonably good selection of comparison shops (82) compared with most other centres in the County Borough. All Goad comparison categories are represented and the choice of outlets in most categories is good (five or more outlets). Table 9.2 provides a breakdown of comparison units by category.

9.16 The centre has a relatively poor choice of clothing and footwear shops and jewellers. There is a much higher than average provision of charity/second hand- shops. Most of the outlets in the centre are small independent traders.

Table 9.2 Mix of comparison goods shops – Colwyn Bay town centre

Type	Number units	% units	UK average
Clothing and footwear	5	6.1	21.5
Furniture, carpets and textiles	14	17.1	7.7
Books, arts, cards and stationers	5	6.1	6.1
Electrical, music and photography	8	9.8	9.3
DIY, hardware and homeware	4	4.9	6.9
China, glass and gifts	2	2.4	5.5
Cars, motorcycles and accessories	1	1.2	1.3
Chemists, drug stores and opticians	7	8.5	12.0
Variety, department and catalogue	2	2.4	1.7
Florists, nurserymen and seedsmen	3	3.7	2.2
Toys, hobby, cycle and sports	4	4.9	5.5
Jewellers	1	1.2	5.1
Charity and second-hand shops	16	19.5	10.0
Other comparison goods retailers	10	12.2	5.2
Total	**82**	**100.0**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average

9.17 Colwyn Bay has a small selection of multiple comparison retailers (excluding charity shops), supported by a wider choice of independent comparison traders. The multiple comparison retailers are shown in Table 9.3.

Table 9.3 Colwyn Bay's comparison multiples

Bon Marche	Clarks Shoes	Savers	Superdrug
Boots	Home Bargains	Shoe Zone	The Works
Card Factory	Poundland	Specsavers	

Source: Lichfields' land use survey October 2021

9.18 Colwyn Bay has an extensive range and choice of non-retail service uses (117 in total), the second highest in the County Borough, as shown in Table 9.4. Colwyn Bay's mix of non-retail services is broadly consistent with the County Borough and UK averages and there is a good choice of outlets within most categorises. There are high proportions of banks/other financial services, takeaways and hairdressers/ beauty parlours. The provision of pubs/bars and estate agents is relatively low.

Table 9.4 Mix of service uses – Colwyn Bay town centre

Type	Number units	% units	UK average
Restaurants/cafés	21	21.6	24.0
Fast food/takeaways	16	16.5	14.9
Pubs/bars	7	7.2	11.8
Banks/other financial services	14	14.4	8.4
Betting shops/casinos/amusement	2	2.1	3.8
Estate agents/valuers	4	4.1	7.8
Travel agents	2	2.1	1.5
Hairdressers/beauty parlours	30	30.9	26.3
Launderettes/dry cleaners	1	1.0	1.7
Sub-total	**97**	**100.0**	**100.0**
Other	20		
Total	**117**		

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average

Retail catchment area

9.19 The household survey results indicate over 59% of respondents across the study area had used shops and services in Colwyn Bay town during the last year, second highest centre behind Llandudno (91%). Nearly 86% of respondents living in the local area (Zone 1 -Central) had visited the centre. The centre's lowest market share was 48% in Zone 4 – West. Only 7% of study area respondents indicated that they do most of their non-food shopping in Colwyn Bay, but this was still the second highest figure in the County Borough behind Llandudno.

9.20 The retail capacity analysis suggests Colwyn Bay attracts about half of its trade from the local Zone 1 – Conwy Central. Colwyn Bay attract a reasonable level of trade from all four study area zones and also from tourist visitors.

9.21 The household survey results indicate about 56% of respondents using the centre stay for less than an hour and the average length of stay is 64 minutes. Only Abergele (59 minutes) and Llandudno Junction (53 minutes) have a shorter average length of stay in the County Borough.

Retail rental levels

9.22 The VOA's latest Zone A retail rents vary throughout the centre. The highest prime pitch Zone A rents range from £200 to £225 per sq.m achieved in the Bay View Shopping Centre and Station Road. Zone A retail rents on Sea View Road range from £150 to £180 per sq.m. Within peripheral parts of the centre, along Abergele Road Zone A rents range from £105 to £135 per sq.m, providing more affordable accommodation for small independent traders.

Public transport linkages

9.23 Colwyn Bay train station lies on the Crewe to Holyhead North Wales Coast Line and is managed by TfWR, who run the main hourly services from the station. The first of these services runs eastwards along the coast and ultimately to Cardiff or Birmingham International via Wrexham General, with some trains ending at Crewe. The second hourly service runs to Manchester Piccadilly via Warrington Bank Quay, with some trains extending to Manchester Airport. Avanti West Coast operates two daily trains each way from London Euston to Holyhead, and three services each way per weekday from Crewe to Holyhead. On Sundays there is an hourly service each way from Crewe to Holyhead.

9.24 There are several bus stops along Conwy Road and a stop servicing the train station. Services run eastwards towards Abergele or westwards to Llandudno Junction.

Car parking

9.25 There are five public car parks in Colwyn Bay offering around 736 spaces, with most on the periphery of the main centre, including Bay View. There are further spaces available along the West Promenade. Prices range from 50p to £1.20 for an hour and up to around £5 for 24 hours. There is also on-street parking along many of the side streets from Conway Road.

Levels of crime

9.26 There were 2,256 crimes reported in Colwyn Bay in the year to March 2022, indicating a crime rate of 205.4 crimes per 1,000 people. This is higher than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period and is the highest rate of crime of the towns assessed in this study.

Colwyn Bay as an Employment Centre

Quantum, Types and Quality of Existing Floorspace

Figure 9.3 Provision of office floorspace in Colwyn Bay

Source: VOA / Lichfields

9.27 VOA data suggests that there is around 31,500 sqm of office floorspace within Colwyn Bay Town Centre across around 238 individual office units. This includes the Council's offices on Conway

Road and gives Colwyn Bay the largest amount of office space and highest number of individual units of any of the 13 centres assessed in this study.

9.28 Defining a wider area around Colwyn Bay using LSOAs which includes Eirias Park to the East and extends to Pwyllycrochan Woods to the south and Ebberston Road to the North, VOA data indicates a total office floorspace of around 268,000 sqm in 2020. This equates to growth of around 103,000 sqm or 62.4% since 2001.

9.29 The largest office unit in Colwyn Bay is the Council's offices at Coed Pella, which offer around 9,200 sqm of floorspace. This is followed by the Crown Buildings on Coed Pella Road which offer around 2,700 sqm. Of the 238 units registered with the VOA, 184 or 77.3% are 100 sqm or smaller. Wynnstay Road has the highest amount of units in the centre at 79, most of which are small individual units in converted residential properties and house predominantly financial and business service companies. This is followed by Conway Road which has 55 units, most of which are within Carlton House and Commodore House or are first floor units above retail. Princes Drive has 53 units, with the remaining units in the centre spread across a number of different locations.

Representation of Businesses

9.30 Aside from the Council Offices, units in Colwyn Bay are predominantly occupied by E(c) uses including accountants, solicitors, and other financial service companies. There are however firms in other sectors present including small engineering and construction offices, architects, surveyors and hair and beauty clinics.

Figure 9.4 Commodore House Business Centre and the Council's Head Offices, Colwyn Bay

9.31 Based on CoStar data, the Council's head office is rated as four-out-of-five for quality, the only building with such a rating in all of Conwy County Borough. Other office properties in the centre are rated predominantly as two-star quality, with some three-star properties, which is roughly in line with other centres.

Stock Vacancy and Turnover

9.32 A review of the centre in December 2021 indicated that there was a medium level of office vacancy. Most of the vacant premises were single units in multiple occupation properties along

Wynnstay Road and Princes Drive, although a couple of these properties were fully vacant and advertised as for sale. One of these properties is listed as an investment opportunity to provide a business centre type operation. Commodore House on Conway Road was advertising vacancies with commercial property sites showing two floors of the building to be fully or partially available. Carlton House Business Centre looked to be fully occupied.

9.33 In addition, there were a number of vacant properties which looked suitable for conversion to office use, particularly on the second floors of retail units on Penrhyn Road. Separate access for upper floors however may be an issue. Telecom House on the corner of Hawarden Road/above Barclays bank on Conwy Road also looked to be vacant and possibly has potential as office.

9.34 Overall, a review of the centre would suggest a level of vacancy in Colwyn Bay above the Conwy average. However, it remains that the centre has the highest concentration of office uses of any centres assessed as part of this study and offers the largest range of unit sizes and quality.

Office rental levels

9.35 CoStar indicates an average rent per sqm of around £130 in Colwyn Bay with a 10-year average of £120, although this may be a little high as many smaller and business centre units are not included in the dataset. Smaller converted units such as those along Wynnstay Road rent for around £90 per sqm, whilst units on Conway Road range from £110 - £150 per sqm.

Public Services

9.36 Colwyn Bay now hosts the Local Authority's main administrative building in Coed Pella which is centrally located to provide a broad range of services. There is also a public library.

9.37 Unfortunately, the onset of COVID prevented occupation of the building for a two-year period with the majority of officers working from home which had a severe effect on daytime footfall. As of Q3 2022 Council staff are returning to the office which will benefit the town, although due to hybrid working arrangements it is unclear if Coed Pella will be occupied to the intended pre-Covid level.

Operator Requirements

9.38 In terms of retail, occupier requirements have been obtained by Lichfields from the Requirements List as of 26th May 2022. There are three potential occupiers for the town, seeking the following units:

- Aldi 18,000 to 22,000 sq.ft
- The Range 15,000 to 30,000 sq.ft
- Tool Station 2,750 to 6,000 sq.ft

9.39 Otherwise, Richard Baddeley & Company considers that demand is limited, with many retailers dismissing the town because the footfall is too low compared to Llandudno and Conwy.

Customer views

9.40 As part of the household survey, respondents were asked if they had used shops and services in Colwyn Bay in the last year. Of those who had used shops/services in the town, respondents were asked what they like and dislike about the town centre.

9.41 On balance levels of satisfaction were mixed. About 31% indicated there was nothing they like about the centre compared with 39% who indicated there was nothing they dislike about the centre. The difference (8 percentage points) was the lowest in the County Borough, suggesting relatively poor levels of satisfaction.

9.42 About 17% of respondents like Colwyn Bay because of its closeness to their home. The main factors mentioned (5% of respondents or more) were:

- *factors liked*: good range of shops (9%); car parking easy to find (8%); can get everything wanted (5%); choices of places to eat and drink (5%).
- *factors disliked*: poor range of shops (14%); too many vacant shops (13%) hard to find car parking (9%); unattractive shopping environment (7%); and poor choice of shops (7%).

9.43 Overall Colwyn rates poorly compared with other centres in the County Borough.

Business Views

9.44 The business survey received 14 (15.2%) responses from businesses located in Colwyn Bay, the second highest number of responses after Llandudno. Responses came from a range of sectors including retail, hospitality, health, beauty and manufacturing.

- Asked about upcoming plans for their premises, several businesses stated that they plan to revamp and refresh their premises, including frontage refreshes and improvements to energy efficiency.
- One business noted that they are having difficulties in making their desired improvements to their property due to being within the conservation area, even when these improvements are related to health and safety and will not be outwardly visible. It was further noted that others who make regular changes without permission are not penalised for doing so.
- Several respondents mentioned both the rising cost of doing business and dwindling custom/footfall as leading to severe difficulties.
- One respondent indicated a lack of communication from the Council on future plans for both Coed Pella and the town centre more generally.
- One business stated that small independent traders are not supported and there is a lack of both co-working and small retail space for small traders such as markets.
- Parking was mentioned by several respondents, particularly the lack of parking within the town centre leading to more use of retail parks and staff having to park in residential areas.
- Several respondents bemoaned the pedestrianisation of Station Road, stating that this had reduced custom for high-street businesses and asking for this to be reversed.
- One larger firm noted that the reduced train timetables for trips to/from London and Manchester has started to cause real issues for them and their staff.
- More support for independent micro businesses was a key theme of responses, including the need for more flexibility in non-A1 uses, more flexible office/business space and more retail opportunities for independent traders.
- In terms of vacant units and development opportunities, the Imperial Hotel, Peacocks and Factory Shop were all mentioned by several respondents. Alongside the need to attract a larger named retailer to the town, it was also suggested that larger premises could be broken up into space for small traders.

SWOT Analysis

Strengths

- Colwyn Bay is the largest of the designated town centres in the County Borough, only Llandudno has more retail and service units, with a relatively wide catchment area.

- The centre has a reasonably good range and choice of comparison goods shops, particularly independent operators.
- There is a good range of service facilities, including banks, building societies and hairdressers/beauty parlours.
- Prime retail rents are the joint third highest in the County Borough. There are more affordable properties in peripheral areas.
- The centre has the most office floorspace and most individual office units of any of the 13 centres in this study.
- Colwyn Bay is home to the Council's offices at Coed Pella – the highest quality office building in the County Borough.
- The centre has good public transport links i.e. rail and bus.
- Accessible car parking provision with five public car parks including provision along the promenade.
- The Bayview Shopping Centre provides a covered shopping environment, although the centre is relatively dated.
- Station Road and Princes Drive provide pedestrian friendly shopping areas.
- The Promenade is a short walk from the town centre, although linkages are restricted by the A55.

Weaknesses

- The centre has the lowest levels of customer satisfaction, particularly of terms of the range of shops, vacant units and unattractive shopping environment.
- Colwyn Bay has a relatively short average length of stay (64 minutes) for customers using the centre.
- Despite the centre's potential to attract tourist visitors, there is a relatively low provision of restaurant/cafés and pubs/bars.
- The shop vacancy rate is significantly above the Country and UK averages. There is a concentration of vacant units at Station Road.
- Excluding the Bayview Shopping Centre, shop units are primarily period buildings that are narrow and limited in size.
- Colwyn Bay has a relatively short average length of stay for customers using the centre when compared with the other main centre in the County Borough.
- The shopping environment along Abergele Road suffers from relatively high levels of through traffic and narrow pavements in places.
- Colwyn Bay has the highest crime rate compared with other towns in the County Borough.

Opportunities

- Increased 'staycation' demand could increase the number of tourist visitors to the town and seafront, providing spin off benefits to shop and services in the town centre.
- Improved linkages to the Promenade could help attract more tourist visits to the centre.
- There is an opportunity to improve and strengthen the evening/night-time economy, utilising vacant premises particularly in the pedestrianised Station Road area.

- Future population and expenditure growth provides an opportunity to strengthen shops and services to improve Colwyn Bay's role.
- The area around the railway station has potential for development and improvements to the linkages to the centre and the promenade.

Threats

- The quality of the shopping environment could deteriorate further, reducing the centre's ability to attract customers.
- Continuing national market difficulties and increased on-line shopping could reduce operator demand for space in the centre.
- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators due to the lack of larger format units.
- The longer-term impact of Covid-19, Brexit and now the cost-of-living crisis may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies. The move to working from home may reduce daytime footfall and lunchtime/after work spend in the centre.

Colwyn Bay – Option Development

9.45 Colwyn Bay serves as the primary town centre office location within the County Borough, being home to the largest provision of office floorspace and Coed Pella, the largest and most modern office building in Conwy and home of the Council. There have been numerous attempts at regenerating Colwyn Bay in recent years including the pedestrianisation of Station Road, as well as an influx of investment by existing and new small businesses in advance of the Council's relocation into Coed Pella.

9.46 Unfortunately, the town has struggled through the Covid-19 pandemic and footfall continues to be a primary concern. The move to working from home for both the Council and many other firms has only exacerbated a downward trend and has meant that regeneration attempts have not been supported by increased levels of visitors and spending within the centre. This may begin to change as staff return to offices, with Council staff beginning to return to Coed Pella in Q3 2022.

9.47 Colwyn Bay has the third highest level of vacant and properties of any centre within this study and notably has several significant buildings in prime locations which are in obvious need of reinvestment and/or repurposing such as the Imperial Hotel and many units along Station Road.

9.48 The pedestrianisation of Station Road itself has also proven controversial, with differing views on its impact and whether there should be a partial or full reversion to traffic and parking on the street.

9.49 Station Road also ties into a wider opportunity to improve the pedestrian linkages, coherence and overall feel of this part of the centre, encompassing the train station, Imperial hotel, Station Road, the Ivy Street car park and the Bay view shopping centre.

9.50 Similarly, the route from the centre through to the train station and onwards to the promenade could be improved to create a greater connection between the centre and the seafront, as well as encouraging more pedestrian traffic from visitors to the beach into the centre.

9.51 Finally, Coed Pella should act as a key asset for Colwyn Bay. Whilst staff are now returning to the offices following the Covid-19 pandemic, a strategy should be developed which sets out the future of the building, with a view to reoccupying as much of the space as possible to support local spending, footfall and the overall vibrancy of the centre.

9.52 Objectives for Colwyn Bay include:

- Develop a strategy to fill vacant properties
- Review the pedestrianisation of Station Road
- Improve linkages between the train station, Station Road, the Bay view centre, and the promenade
- Maximise the use of Coed Pella

Develop a strategy to fill vacant properties

9.53 A land use survey in October found 48 vacant retail properties, representing 18.2% of the 264 units in the centre. The amount of vacant units came up repeatedly in survey responses as a primary issue for the town, and the scale of the problem is obvious from a walk around the centre, with many of the empty properties being on primary shopping streets. In addition, there are several large empty units in historic buildings which need significant investment such as the Imperial Hotel, and former Original Factory Shop and Peacocks stores, all situated on Station Road.

Review the pedestrianisation of Station Road

9.54 The pedestrianisation of Station Road, which was formerly considered the primary shopping street in Colwyn Bay, has been a topic of controversy for more than 30 years. Many local businesses and residents consider that the pedestrianisation of the street has contributed to a slow decline in footfall which has ultimately led to the closure of many long-established businesses. As a result, the street now suffers from a high number of vacant units, some of which are of a significant size and situated in historic buildings in need of investment.

9.55 The inability for people to park near shops is seen by many as a key factor in the decline of the street and leads shoppers instead into the Bay View centre. A long-proposed solution has been the opening of the street to traffic in one direction to compliment to the one-way system on the parallel Penrhyn Road. Along with the reinstation of short-term parking bays, it is believed that this will encourage shoppers back into the street.

9.56 Aside from pedestrianisation, there is a clear issue with attracting new traders into the street that also needs to be addressed, as well as buildings in need of intervention. These issues are particularly important on Station Road due to the role the street plays in the structure of the centre and within other potential regeneration efforts within Colwyn Bay. It is worth noting that there are a cluster of cafes and restaurants which do make use of outdoor space on Penrhyn Road. This indicates that these kinds of businesses are establishing themselves in the town, just not on Station Road despite the abundant outdoor space.

9.57 Whilst these discussions have been happening for decades, the current poor health of the street necessitates careful consideration of the potential effects of reintroducing traffic. Pedestrianisation is an increasingly popular policy within regeneration schemes and has been shown to be successful in areas with good levels of footfall and traders in place who can take advantage of the outdoor space.

9.58 Similarly, reintroduction of traffic and parking may not provide an immediate boost to the street due to the current lack of reasons to shop there rather than the Bay View centre or elsewhere. A flexible approach may be needed which allows for calm traffic and gives businesses the option to utilise their frontage space for parking, seating, or outside stalls.

9.59 The street finds itself in a middling state in 2022, with no real selection of traders justifying pedestrianisation by using the space, but also with no real shopping offer for those who may want to drive and park up on the street. Either way, interventions to attract traders are required, as well as consideration of the role street should play in the centre and whether some reversal of pedestrianisation would help to facilitate this revival.

Improve linkages between the train station, Station Road, the Bay View centre, and the promenade

9.60 The main shopping area of Colwyn Bay includes Station Road, the Bay View Shopping Centre, and the pedestrianised section of Princes Drive outside the Bay View Centre. This area connects Colwyn Bay station with Abergele Road and the rest of the centre, whilst the promenade is accessed via a walkway leading from the station and under rail line.

9.61 Currently there is a lack of coherence between the centre itself and the train station. The area outside the station (which sits on an overpass above the A55) is currently dominated by a small car park, with curbs, raised pavements which differ from those used in the main shopping area, and no clear pathways or crossings leading pedestrians to/from the centre. The area outside the station also features very little greenery, again in contrast with the centre immediately on the other side of the road. This contrast makes the area feel unattractive with a clear vehicle priority.

9.62 This area also serves as the link between the centre and the walkway which takes pedestrians to and from the promenade. As such this route again feels disconnected from the main shopping area, with no obvious draw for visitors to stroll from the centre to the seafront or vice versa.

9.63 The area outside the station including a section of the B5113 road would benefit from redevelopment which removes the raised curbs and changes in surface to give greater parity between drivers and pedestrians. This would still allow for parking, drop off points and calmed traffic, but would give greater cohesion with the centre and an improved pedestrian experience when heading to/from Station Road and Princes Drive. Equally, this could allow for extensions to the surfacing used on Station Road and Princes Drive, creating an obvious pedestrian route from the centre past the station and to the promenade walkway, highlighted with improved lighting and greenery.

9.64 The signposting of the seafront from the centre is also relatively poor, making it very easy to miss that the promenade can be accessed from the centre at all for those not familiar with the area. This is not the case the other way, with clear signposting of the centre from the promenade, and could be rectified with new signage.

9.65 Finally on this issue, the Ivy Street car park that sits in between Station Road and the Bay View centre currently stands an underutilised, isolated and unattractive part of the town which is known to have issues with anti-social behaviour. Whilst there are difficulties, like maintaining vehicular access to the rear of shops and residencies, this site offers another potential opportunity to become part of a wider regeneration of this part of the centre. This is further explored in the site-specific development opportunities section for Colwyn Bay.

Maximise the use of Coed Pella

9.66 Coed Pella, the Council's £58 million state-of-the-art office in Colwyn Bay, was built as a key pillar of the regeneration of Colwyn Bay. The new offices would provide a centralised point of contact with the council and would support increased footfall within Colwyn Bay during weekdays. Commercial agents have also reported that the announcement of Coed Pella acted as a catalyst for heightened confidence in the market and increased investment in the town, with new traders opting to take a chance on opening in Colwyn Bay and existing ones investing in improved shop frontages.

9.67 Council staff are now returning to Coed Pella following an extended period of homeworking due to the Covid-19 pandemic. However, with hybrid working likely to continue it is unlikely that all 520 desks will be taken up by Council staff and as such the building is likely to operate with significant spare capacity.

9.68 The situation at Coed Pella should be closely monitored, and on this basis a strategy formed for the future use of the building. It may be that more workers return to the office in the near future, however it should also be considered that alternative uses for some of the floorspace may need to be investigated. Similarly, the Council may wish to review its estates portfolio and further consolidate its operations into Colwyn Bay.

9.69 A Library and Information Strategy is currently under development which explore the options for relocating Colwyn Bay Library into Coed Pella, although the proposal has been met with serious public opposition through almost 1,800 signatures on a petition calling against the move. Other options might include forming partnerships with other organisations to take up some of the building, or potentially exploring the options for drop-in co-working space or short-term leases for small traders and start-ups who require flexibility.

Wider Environmental Improvements

9.70 The draft TEP Green Infrastructure Conwy Project recommends that for Colwyn Bay Town Centre there should be a particular focus on the focus on the Town Centre approach, the railway station gateway and the main active travel route towards the seafront. Recommendations are summarised in the Figures below, but include:

- **Conway Road/Abergele Road Gateway:** This Gateway to the Town Centre requires a greater sense of arrival and pedestrian and cycle priority through traffic calming and greening. This would also involve increasing walkways, rationalise parking bays and introduce tree and rain garden planting to create a green gateway through the town, connect existing parks and Nature Reserve. Introduce dedicated cycle provision and traffic calming.
- **Penrhyn Road Connection:** Green street and enhance Active Travel connection between Conway Road and Waterfront. Reduce road width to single lane and remove parking on one side of road to create space for tree and rain garden planting and dedicated cycle route. Provide opportunities for outdoor dining areas through movable planters.

Figure 9.5 TEP Draft Green Infrastructure Masterplan for Penrhyn Road to Colwyn Bay Railway Station

Source: TEP (2022): Transforming Towns Green Infrastructure Project – Conwy Opportunities

Figure 9.6 TEP Draft Green Infrastructure Masterplan for Penrhyn Road

Source: TEP (2022): Transforming Towns Green Infrastructure Project – Conwy Opportunities

Figure 9.7 TEP Draft Green Infrastructure Masterplan for the Former Market Hall

Source: TEP (2022): Transforming Towns Green Infrastructure Project – Conwy Opportunities

- **Station Road and Sea View Road:** Green street through further use of raised planters with coastal planting to connect to waterfront. Reduce opportunities for parking through use of street furniture and large planters with trees and ornamental grasses/shrubs.

Figure 9.8 TEP Draft Green Infrastructure Masterplan for the Station Forecourt

Source: TEP (2022): Transforming Towns Green Infrastructure Project – Conwy Opportunities

- **Railway Station Gateway:** Create a green gateway to the town through repurposing hardstanding to green space with opportunities for tree planting, SuDS with rain garden planting, ornamental grasses and shrubs. Enhance public realm and create a public square incorporating gateway feature to define space. Enhance connectivity between town and promenade and provide greater pedestrian and cycle priority across B5113 through carriageway narrowing and raised table at crossing. Incorporate tree planting.

Site Specific Development Opportunities

Ivy Street Car Park

9.71 The Ivy Street car park is a c.0.2 ha site between Station Road and the Bay View centre, it offers around 33 parking spaces and currently includes a public toilet building which is set to be demolished. The roughly triangular site is bound by the rear of shops facing Station Road on the western side, as well as two retail units facing onto the car park itself. The western side is also bound by rear access for shops facing the Bay View centre along with vehicle access for several residential properties. On the southern boundary is a building used as a recycling centre and the main access to the car park via Bay View Road.

9.72 Despite being a large and central site, the site is underutilised as a car park, offering few spaces for its size. Aside from the vehicle access, the car park is only accessible via two small alleyways and is known to have issues with attracting anti-social behaviour due to its isolation from the surrounding area. For these reasons, the site should be considered for improvement or potential redevelopment as part of a wider regeneration scheme for the area.

9.73 The site suffers from constraints however, in that vehicular access may need to be maintained for the shops and residencies on either side. An alternative area for retail bin storage and the recycling centre would need to be identified. Opening up the space and improving pedestrian access via Princes Drive and Abergele Road would also necessitate partial or full demolition of some surrounding buildings. Finally, the two shop frontages facing into the car park would need to be considered.

9.74 In its current state the car park is a recognised problem area for the town, which has partially led to the decision to demolish the existing public toilets. As a car park, the efficiency of the space could be improved, and other issues tackled by improved lighting and pedestrian access.

9.75 If the site were to be considered for a more significant redevelopment, it would have the potential to act as another pedestrian through-route linking Station Road, Abergele Road and the Bay View centre. The site could also be developed into a new square or outdoor events space with high levels of greenery and seating. The site is unlikely to come forward for major redevelopment however without forming part of a wider regeneration plan for the area and would require significant funding due to the constraints listed above. There of course would also be the issue of losing central car parking spaces which would need to be addressed.

3-8 Bay View Road

9.76 Along Bay View Road, which sits south of the Bay View shopping centre, lies a row of four- and five-storey residential properties. These buildings are in various states of repair, with most in use as apartments. To the western side of the street are two large vacant residential properties, with a small industrial unit in between where a third property has presumably been demolished. These plots (3-8 Bay View Road) were identified as a potential development site in late 2021.

9.77 From discussions with commercial agents, Lichfields understands that these properties have been purchased by Wales and West Housing, who submitted a planning application in June 2021 (0/48566). The description of development is as follows:

"Demolition of existing buildings and erection of a supported living affordable housing development (Use Class C3), access, parking, landscaping and communal courtyard, drainage infrastructure and associated development."

9.78 As of July 2022, the application has not been granted permission but is moving forward, with the plans being tweaked based on consultation responses.

9.79 Whilst this site is no longer available for development, there may be opportunities in the future to consolidate the existing accommodation on Bay View Road with a view to refurbishing or redeveloping some of the more dilapidated properties for further new housing.

Land adjacent to Wetherspoons, Princes Drive

9.80 This c.0.16 ha site lies on Princes Drive adjacent to The Picture House JD Wetherspoons with the A55 running to the rear at a lower elevation. The site comprises previously developed land and was earmarked as a potential new car park site before being advertised as a development site by the Council.

9.81 The site was also originally allocated for office development within the emerging Replacement Local Development Plan but was subsequently removed. The remainder of the site is unlikely to come forward for significant development and would suit the originally intended use as an additional car park for the town. This may allow for the reduction of car parking in front of Colwyn Bay station or at the Ivy Street car park.

10.0 Conwy Town Centre

Introduction

10.1 Conwy is designated as one of five Town Centres in the Conwy Replacement Development Local Plan – Preferred Strategy. It was also designated as a Town Centre in the Adopted LDP. It is a second-tier centre in the hierarchy of centres in the County Borough, below the Sub-Regional Shopping Centre at Llandudno.

Figure 10.1 Conwy Castle

10.2 The walled market town lies on the river Conwy and is famous for its spectacular Castle and town walls built at the instruction of Edward I in 1283 as well as the Conwy Suspension Bridge designed by Thomas Telford and built in 1826. The town features sloped cobbled streets and a wealth of independent retailers and pubs. Other notable attractions include Aberconwy House, the Conwy Railway Bridge and the house named in the Guinness Book of World Records as the smallest house in Great Britain located along the quay, measuring just 3.05 x 1.8 meters.

10.3 Conwy's main centre lies within the town walls and includes the quayside just outside. The main retail areas lie along the main road of Berry Street and adjoining cobbled streets of High Street and Chapel Street. Rose Hill Street runs around the perimeter of the centre to the south east and south west sides and features pubs/bars as well as some retail and commercial use. A rail line forms the south western boundary of the centre. A small part of the walled town extends beyond the rail line to the south west but is a residential area. Aberconwy House sits in the middle of Berry Street, Rose Hill Street and High Street and forms a central point for the town.

Figure 10.2 Conwy town centre and potential development/improvement sites

Source: Lichfields

Conwy as a retail and service destination

10.4 Conwy town centre has 99 retail and service units. In terms for the number of units Conwy is the third largest centre in the County Borough. The diversity of uses within the centre is set out in Table 10.1, compared with the Goad Plan UK average and the average for all centres in Conwy County Borough.

Table 10.1 Mix of shops/service uses in Conwy town centre

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	35	35.4	31.9	29.0
Convenience goods retail	16	16.2	8.7	9.7
Financial/professional services	4	4.0	7.7	9.0
Restaurants/cafés	14	14.1	10.7	10.0
Pubs/bars	7	7.1	4.6	4.9
Hot food takeaways	4	4.0	5.7	6.2
Other non-retail services	10	10.1	17.4	16.5
Vacant	9	9.1	13.4	14.7
Total	**99**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021

10.5 Conwy has a high proportion of retail units. The proportion of comparison goods and convenience goods retail uses are both above the UK and County Borough averages. There is also a high proportion of restaurants/café and pubs/bars, but a low proportion of other non-retail services. This mix of uses reflects the centre's role as a major tourist destination. There were 9 vacant retail units within the centre at the time of Lichfields' survey (October 2021), a vacancy rate that is lower than the UK and County Borough averages.

10.6 Conwy has a reasonable selection of comparison shops (35 outlets). Most of the Goad comparison categories are represented, but the choice of outlets in most categories is limited (three or fewer outlets). Table 10.2 provides a breakdown of comparison units by category. Conwy has a good provision of clothing/footwear and gift shops for a centre of its size.

Table 10.2 Mix of comparison goods shops – Conwy town centre

Type	Number of units	% units	UK average
Clothing and footwear	10	28.6	21.5
Furniture, carpets and textiles	1	2.9	7.7
Books, arts, cards and stationers	1	2.9	6.1
Electrical, music and photography	0	0.0	9.3
DIY, hardware and homeware	2	5.7	6.9
China, glass and gifts	7	20.0	5.5
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	3	8.6	12.0
Variety, department and catalogue	0	0.0	1.7
Florists, nurserymen and seedsmen	2	5.7	2.2
Toys, hobby, cycle and sports	2	5.7	5.5
Jewellers	2	5.7	5.1
Charity and second-hand shops	2	5.7	10.0
Other comparison goods retailers	3	8.6	5.2
Total	**35**	**100.0**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021

10.7 Conwy has a small selection of multiple comparison retailers (excluding charity shops), including Fat Face, Mountain Warehouse and Rowlands Pharmacy. Most of the outlets are independent traders.

10.8 The centre has a reasonable range of service uses (39 in total), as shown in Table 10.3. The representation of most categories differs from the national average. There are high proportions of restaurants/cafés and pub/bars, which caters for tourist visitors as well as local residents. Conversely there are low proportions of some other non-retail services, e.g. banks/financial services.

Table 10.3 Mix of service uses – Conwy town centre

Type	Number of units	% units	UK average
Restaurants/cafés	14	38.9	24.0
Fast food/takeaways	4	11.1	14.9
Pubs/bars	7	19.4	11.8
Banks/other financial services	0	0.0	8.4
Betting shops/casinos/amusement	0	0.0	3.8
Estate agents/valuers	3	8.3	7.8
Travel agents	1	2.8	1.5
Hairdressers/beauty parlours	7	19.4	26.3
Launderettes/dry cleaners	0	0.0	1.7
Sub-total	**36**	**100.0**	**100.0**
Other	3		
Total	**39**		

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021

Retail catchment area

10.9 The household survey results indicate nearly 44% of respondents across the study area had used shops and services in Conwy during the last year, the third highest figure for the six main centre, behind Llandudno and Colwyn Bay. The centre achieved a relatively high market share across all study area zones. However, only 0.4% of study area respondents indicated that they do most of their non-food shopping in Conwy, which suggests residents across the County Borough visit Conwy on an occasional basis.

10.10 The retail capacity analysis suggests Conwy attracts only 22% of its trade from the local Zone 4 - West. A high proportion (62%) is estimated to comes from tourist visitors.

10.11 The household survey results indicate about 52% of respondents using the centre stay for more than an hour and the average length of stay is 78 minutes. Conwy has the second longest average length of stay in the County Borough, only behind Llandudno (98 minutes).

Shop rental levels

10.12 The VOA's latest Zone A retail rents indicate the highest prime pitch Zone A rents achieved in Conwy town centre are £250 per sq.m. This rental level is achieved along the High Street and Castle Street. In peripheral parts of the centre Zone A rents range from £130 to £225 per sq.m, providing more affordable for small independent traders.

Public Transport Linkages

10.13 Conwy Rail Station is located within the town walls to the south of the centre and lies on the Crewe to Holyhead North Wales Coast Line. There is a two-hourly service each way Monday to Saturday which increases to an hourly service at peak morning/afternoon times. This service runs between Holyhead and Chester and then southwards to Cardiff Central or Birmingham International. Sunday services are infrequent and run to either Crewe, Cardiff Central, Wolverhampton or Manchester Piccadilly.

10.14 There are bus stations on Castle Street, Rose Hill Street and Town Ditch Road just outside the town walls. Services run westwards towards Bangor or connect with Llandudno Junction before running north towards Llandudno or east along the coast towards Colwyn Bay. Services also run southwards towards Llanrwst and Betws-y-Coed.

Car parking

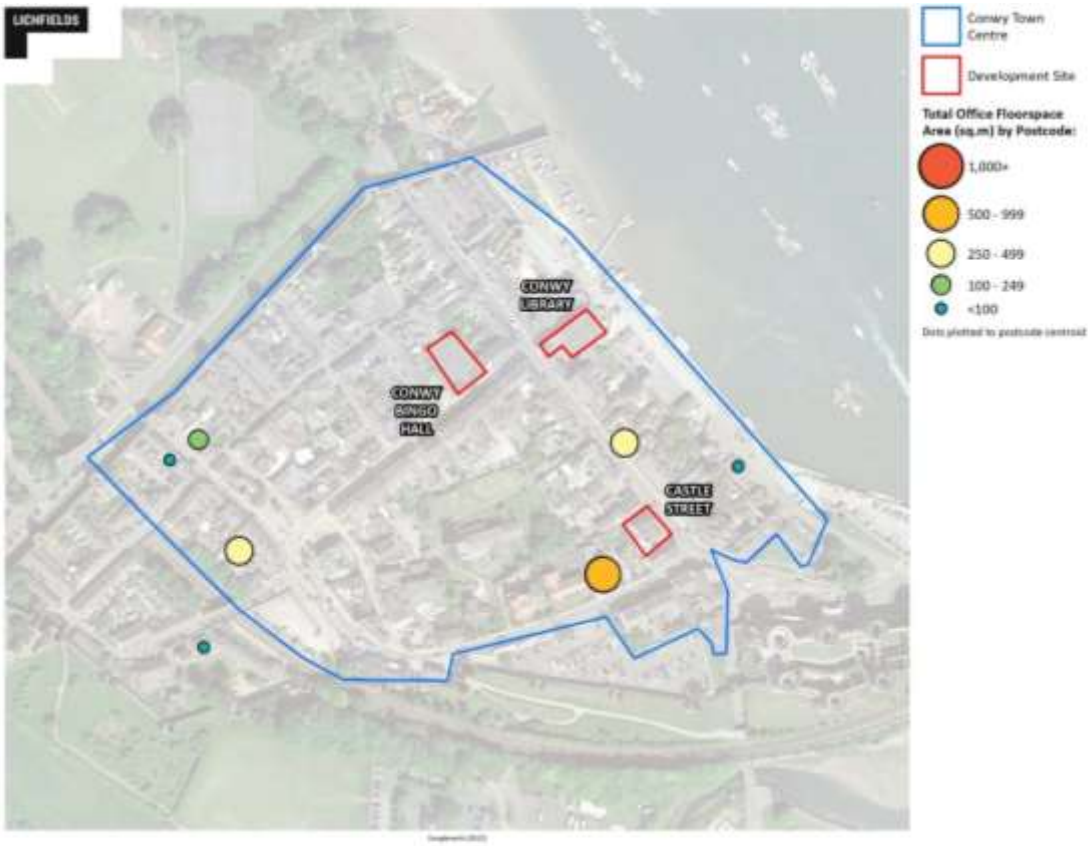
10.15 There are seven car parks in Conwy offering a total of 585 spaces. However, 124 of these spaces at Bodlondeb Car Park have limited availability from Monday to Friday. Prices range from £1.20 per hour to £5.20 for 24 hours. Bodlondeb Car Park offers slightly cheaper parking at weekends and bank holidays starting from 60p for one hour.

Levels of crime

10.16 There were 442 crimes reported in Conwy in the year to March 2022, indicating a crime rate of 108.5 crimes per 1,000 people. This is lower than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period but is the 7th highest rate of crime of the towns assessed in this study[5].

Conwy as an Employment Centre

Figure 10.3 Provision of office floorspace in Conwy



Source: VOA / Lichfields

Quantum, Types and Quality of Existing Floorspace

10.17 There is little office use within Conwy's main retail and commercial centre. VOA data indicates around 1,800 sqm of space within the centre, with this being spread across a several properties. These include the Old Municipal Buildings (1st and 2nd floors) on Castle Street, Regent House (1st

[5] https://www.ukcrimestats.com/Neighbourhood/5984

floor) on Castle Street, the J.W. Hughes & Co. Bank House on Lancaster Square, the old Post Office building on Bangor Road, and the Guild Hall and Muriau Buildings on Rose Hill Street.

10.18 The office offer in Conwy is centred on Riverside Business Park, a former Fisheries Laboratory facility which is now substantially occupied by private commercial office operations. The site is located on Benarth Road, around ten minutes walking distance of the Town Centre beyond the town walls, which benefits from dedicated car parking. The VOA indicates that there is around 1,150 sqm of office space within the Business Park.

Representation of Businesses

10.19 Office use in Conwy Town Centre primarily stems from solicitors, financial advisory firms, and estate agents with office space above retail frontages.

Stock Vacancy and Turnover

10.20 CoStar data and a visit to Conwy did not reveal any vacant office units, indicating that vacancy rates are at or close to zero within the main centre.

Rental Levels

10.21 CoStar indicates an average rent of around £115 per sqm in the town centre, against a ten-year average of £100 per sqm. A review of commercial agent websites also did not reveal any space available within the town.

Public Services

10.22 The public services within Conwy are housed mainly at Bodlondeb Park. Bodlondeb is the second largest facility of administration within the Authority and has dedicated parking.

10.23 There is a new Library facility on the edge of Park beyond the town walls and the existing facility within the main centre is being marketed for re-development.

Operator Requirements

10.24 In terms of retail, occupier requirements have been obtained by Lichfields from the Requirements List as of 26th May 2022. There are two potential occupiers for the town, seeking the following units:

- Grape health food store 1,250 sq.ft
- Amber Taverns 2,000 sq.ft

10.25 Otherwise, Richard Baddeley & Company considers that demand is limited, with many retailers comprising mainly outdoor leisure retailers who compete with the likes of Fat Face and Mountain Warehouse. There are currently no vacant units within the town.

Customer views

10.26 As part of the household survey, respondents were asked if they had used shops and services in Conwy in the last year. Of those who had used shops/services in the town, respondents were asked what they like and dislike about the town centre.

10.27 On balance levels of satisfaction were positive. Only 6% indicated there was nothing they like about the centre compared with 52% who indicated there was nothing they dislike about the centre. The different (46 percentage points) was the second highest behind Llanrwst (59), which suggest relatively high levels of satisfaction with the centre.

10.28 Over 35% of respondents like Conwy because of it has a nice shopping environment, consistent with its role as a major tourist destination. The main factors mentioned (5% of respondents or more) were:

- *factors liked*: nice shopping environment (35%), good independent shops (26%); good range of shops (14%); choice of places to eat/drink (12%); friendly atmosphere (11%) compact centre (7%); and.
- *factors disliked*: hard to find car parking (26%); car parking expensive (5%); too busy (5%).

10.29 Conwy rates most favourably in terms of environmental factors, independent shops and friendly atmosphere. It rates less favourable in terms of car parking.

Business Views

10.30 The business survey received eight responses from businesses located in Conwy, which were mostly positive about the town. Respondents stated that footfall is healthy, business are predominantly independent traders and the town has lots to offer to tourists.

10.31 Only minor comments on the need for improvements were made, mainly around parking, maintaining the exterior of historic buildings and managing anti-social behaviour in the evenings. One respondent suggested pedestrianisation to allow more outdoor eating and drinking would be a huge benefit for the town.

10.32 The Civic Hall, Bingo Hall and The Old Cockpit were highlighted as buildings that could be put to better use, with respondents mentioning food markets and more entertainment/activities as potential uses.

SWOT Analysis

Strengths

- Conwy Town Centre and the Castle are very important tourist destinations, attracting many visitors to the area.
- The centre has a good mix of shops and services. As a tourist destination the centre has a high proportion of gift shops, restaurants/cafés and pubs/bars.
- The centre has a good choice of independent shops.
- The shop vacancy rate is below the Welsh and UK averages.
- The centre has relatively high levels of customer satisfaction, particularly in terms of the shopping environment, choice of independent shops and place to eat/drink.
- Prime retail rents are the second highest in the County Borough, which, when combined with a lower than average vacancy rate, suggests demand for space is reasonably strong. There are more affordable properties in peripheral areas.
- Conwy has a relatively long average length of stay (78 minutes) for customers using the centre.
- The town has a relatively low crime rate compared with other towns in the County Borough.

Weaknesses

- Pedestrian and vehicular conflict and narrow pavements undermine the quality of the shopping environment.
- Conwy has a limit number of national multiple retailers.

- The provision of shops and services to meet the day to day needs of local residents is more limited than other town centres in the County Borough.
- The shop units are small and narrow due to the historic nature of the centre.
- There are limited opportunities for new development.
- Finding car parking spaces can be difficult at peak times and the cost of parking is viewed as expensive by some customers.

Opportunities

- As a popular tourist destination, there is an opportunity to improve and strengthen the evening/night-time economy.
- Increased 'staycation' demand could increase the number of tourist visitors to the town and seafront, providing spin off benefits to shop and services in the town centre.

Threats

- The historic character of the centre could restrict the ability to attract modern retailers/operators.
- The increase in tourist related facilities may undermine the availability of essential local shops and services for residents.

Conwy – Option Development

10.33 Of all the towns in this study, Conwy is the most self-sustaining and the least in need of intervention. The town has braved the Covid-19 pandemic well, returning to high levels of footfall, and what little vacancies the town has are typically quickly taken up by new operators. In most senses, what Conwy requires is more of the same, with a continued focus on protecting and enhancing its historic assets, a careful approach to building materials and the type of traders habiting units in the town, and maintenance of the centre's streets and public realm.

10.34 Whilst Conwy has no real issues with vacant retail properties, Conwy Civic Hall and the former Palace Cinema building are both historic listed buildings in prominent locations and in need of investment and repurposing.

Wider Environmental Improvements

TEP Green Infrastructure Project

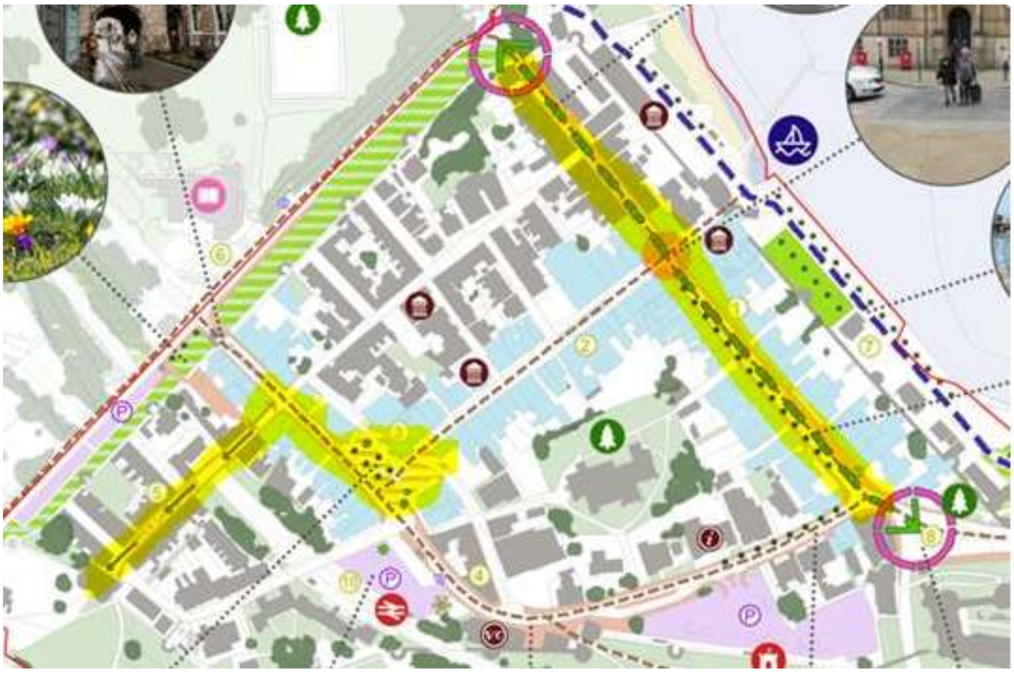
10.35 The draft TEP Green Infrastructure Conwy Project recommends that for Conwy Town Centre there should be a particular focus on the main route through the town centre and central square. Recommendations are summarised in Figure 10.4, but include:

Berry St and Castle St: Opportunity to narrow carriageway, widen footways and remove clutter to create more space for pedestrians and prevent unauthorised parking. Option to create build outs around parking areas to create more space for pedestrians and opportunities for raised table or change in surface crossing points and planting. Opportunity to calm traffic and create pedestrian priority at junction with High St through raised table, surface change and reduction in carriageway to improve pedestrian connectivity to Quay. On Castle Street rationalise parking to provide space for tree planting and SuDS rain garden planting to create green link between Bodlondeb Park and Castle

- **High Street:** Rationalise parking and create build outs around parking areas to create more space for footway and planting. Option for better signage to passageways/footpaths.

- Lancaster Square: Opportunity to enhance the square through improved public realm and planting with tree planting and raised planters. Coordinate street furniture to reduce clutter and remove parking spaces and move taxi rank to increase public realm.
- **Bangor Road and Rose Hill Street:** Opportunity to narrow carriageway and widen footways to create more space for pedestrians, improve crossing points and access for all from Morfa Bach car park. Active Travel route with proposed cycle and walking improvements. Opportunity to consider narrowing carriageway.
- **Upper Gate Street:** Opportunity to improve pedestrian access from Pool Lane including footway and crossing. Potential to make one way street and narrow carriageway.
- **Mount Pleasant and Town Ditch Road:** Opportunity to diversify amenity grass to castle walls with bulb planting, display meadow and tree planting. Opportunity to improve pedestrian access from car park to town centre.
- **Lower Gate Street:** Introduce tree and ornamental planting (potentially in raised planters in places) to soften Quayside. Rationalise hard standing/carriageway to remove opportunities for parking and replace with GI. Consider defining cycle path along Quayside.
- **Castle Square:** Define gateway to town centre through enhanced GI and pedestrian priority.
- **Conway Road:** Consider defining cycle path along promenade adjacent to Conway Road. Potential for dedicated route through amenity grass area.
- **Conway Railway Station:** Option for planting or green walls. Option for artwork to promote arrival space. Option to improve disabled access.

Figure 10.4 TEP Draft Green Infrastructure Masterplan for Conwy Town Centre



Source: TEP (2022): Transforming Towns Green Infrastructure Project – Conwy Opportunities

Site Specific Development Opportunities

Conwy Civic Hall

10.36 Conwy Civic Hall is a Grade II listed building currently listed as a development opportunity by the Council[6]. The building fronts onto Castle Street at the bottom of Chapel Street, Conwy's main shopping area. The rear of the building is situated on the quayside facing the estuary of the river Conwy. The building encompasses around 1,100 sqm over three floors and a mezzanine, with the ground floor still in use as a library. The upper floors were last used as a theatre with around 240 seats.

10.37 The building is listed with a guide price of £500,000 plus, with the Council stating that the building is suitable for a range of uses and uses such as residential retail and hotel would be welcomed.

10.38 It is understood from discussions with Council officers and commercial agents that a buyer had been identified for the property, with plans for using the building as a food hall, aparthotel and some residential use. However, there was concerns over the scale of the development which may have included adding an extra storey to the building in order to achieve viability. Due to these concerns the plans may only move forward if scaled back. As of July 2022, the property is still on the market.

Former Palace Cinema

10.39 The former Palace cinema sits in the middle of Church Street, occupying perhaps the most prime location in the town. The gothic building was built in 1935, having previously been a cinema and afterwards a bingo/concert hall which ceased operation in 2012.

10.40 Whilst there is an ice cream shop operating out of the front of the building and a successful restaurant on the top floor (The Jackdaw), the bulk of the building's interior remains empty, with the existing bingo hall stage and ground/circle seating still intact. It is understood from discussions from commercial agents that the interior of the building is in need of investment and suffers from damp. I was also noted that Wetherspoons, who have a history of successfully converting similar old cinema buildings, have shown interest. However, it is likely considered that Wetherspoons does not fit within the curated feel of Conwy's current offer, which features little to no chain stores and focuses on higher quality independent traders.

10.41 Having been vacant since its closure in 2012, it is clear that the scale of investment needed to bring the building back into full use is proving prohibitive and the project would require funding. The buildings history and prominent location within the centre however, makes it an attractive site for the right project, which would suit retail as well as food/drink uses.

[6] https://www.conwy.gov.uk/en/Business/Land-and-Property/assets/documents/Key/Particulars.pdf

11.0 Llandudno Junction Town Centre

Introduction

11.1 Llandudno Junction is a small Town Centre, designated as one of five in the Conwy Replacement Local Development Plan – Preferred Strategy. It was also designated as a Town Centre in the Adopted LDP. It is a second-tier centre in the hierarchy of centres in the County Borough, below the Sub-Regional Shopping Centre at Llandudno. Llandudno Junction is the smallest designated Town Centre in the County Borough, although there is significant out-of-centre retail and leisure provision nearby.

11.2 The main centre lies along Conway Road and includes both the train station and Asda Supermarket. The wider area, however, features a significant amount of out-of-town retail, leisure, office and industrial development supporting a large amount of employment. This makes the area the County Borough's primary non-tourism focussed employment area.

Figure 11.1 Llandudno Junction town centre and development/improvement sites

Source: Lichfields

11.3 There is no specific crime data for Llandudno Junction available, with data for postcodes along Conway Road falling within the Conwy administrative area. Conwy overall is the second safest town in Conwy County Borough with 55 crimes per 1,000 people recorded in 2021. However, data for postcodes along Conway Road indicate higher incidences of anti-social behaviour, arson and criminal damage, and violent offences than the Conwy average.

Llandudno Junction as a retail and service destination

11.4 Llandudno Junction has 41 retail and service units, including commercial uses outside and within walking distance of the designated shopping zone. The diversity of uses is set out in Table 11.1, compared with the Goad Plan UK average and the average for all centres in Conwy County Borough. Llandudno Junction has a higher proportion of convenience retail uses, hot food takeaways and other non-retail services compared with the UK and Conwy averages, reflecting the centres role as the local shopping and service destination. The centre has a significantly lower proportion of comparison retail uses. There were 4 vacant retail units within the centre at the time of Lichfields' survey (October 2021), a vacancy rate lower than the UK and County Borough averages. Table 11.2 provides a breakdown of comparison units by category.

Table 11.1 Mix of shops/service uses in Llandudno Junction

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	7	17.1	31.9	29.0
Convenience goods retail	5	12.2	8.7	9.7
Financial/professional services	2	4.9	7.7	9.0
Restaurants/cafés	3	7.3	10.7	10.0
Pubs/bars	2	4.9	4.6	4.9
Hot food takeaways	6	14.6	5.7	6.2
Other non-retail services	12	29.3	17.4	16.5
Vacant	4	9.8	13.4	14.7
Total	**41**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021

Table 11.2 Mix of comparison goods shops – Llandudno Junction

Type	Number units	% units	UK average
Clothing and footwear	0	0.0%	21.5
Furniture, carpets and textiles	1	14.3%	7.7
Books, arts, cards and stationers	1	14.3%	6.1
Electrical, music and photography	0	0.0%	9.3
DIY, hardware and homeware	2	28.6%	6.9
China, glass and gifts	0	0.0%	5.5
Cars, motorcycles and accessories	0	0.0%	1.3
Chemists, drug stores and opticians	1	14.3%	12.0
Variety, department and catalogue	0	0.0%	1.7
Florists, nurserymen and seedsmen	0	0.0%	2.2
Toys, hobby, cycle and sports	0	0.0%	5.5
Jewellers	0	0.0%	5.1
Charity and second-hand shops	2	28.6%	10.0
Other comparison goods retailers	0	0.0%	5.2
Total	**7**	**100.0%**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021

11.5 Llandudno Junction has a limited selection of comparison shops (7 outlets). Most of the Goad comparison categories are not represented and the choice of outlets in represented categories is limited (one or two outlets).

11.6 Asda, Co-op, Iceland and Boots are the only national multiple retailers (excluding charity shops). Most outlets area independent traders.

11.7 The centre has a reasonable range of service uses (25 in total), but the choice within each category is relatively limited, except for takeaway, as shown in Table 11.3. The mix of uses reflects the centre's primary role as a local shopping and service destination.

Table 11.3 Mix of service uses – Llandudno Junction

Type	Number units	% units	UK average
Restaurants/cafés	3	14.3	24.0
Fast food/takeaways	6	28.6	14.9
Pubs/bars	2	9.5	11.8
Banks/other financial services	1	4.8	8.4
Betting shops/casinos/amusement	1	4.8	3.8
Estate agents/valuers	1	4.8	7.8
Travel agents	0	0.0	1.5
Hairdressers/beauty parlours	5	23.8	26.3
Launderettes/dry cleaners	2	9.5	1.7
Sub-total	**21**	**100.0**	**100.0**
Other	4		
Total	**25**		

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021

Retail catchment area

11.8 The household survey results indicate nearly 41% of respondents across the study area had used shops and services at Llandudno Junction during the last year. This is a relatively high figure for a small centre, but may include nearby out of centre retail facilities e.g. the large Tesco superstore. Llandudno Junction attracted nearly 61% of respondents living in the local area (Zone 4 – West). The centre's lowest market share was less than 9% in Zone 2 – East West.. Only 0.6% of study area respondents indicated that they do most of their non-food shopping in Llandudno Junction

11.9 The retail capacity analysis suggests Llandudno Junction (excluding the out of centre stores) attracts 59% of its trade from the local Zone 4. Llandudno Junction predominantly serves a local catchment area in the west and central parts of the County Borough.

11.10 The household survey results indicate about 73% of respondents using the centre stay for less than an hour and the average length of stay is only 53 minutes. Llandudno Junction has the shortest average length of stay in the County Borough. Abergele is the next lowest average (59 minutes).

Shop rental levels

11.11 The VOA's latest Zone A retail rents indicate Zone A retail rents achieved in Llandudno Junction are £190 per sq.m. This rental level does not vary significantly within the centre.

Public Transport Linkages

11.12 Llandudno Junction Train station is located on the western side of the centre near Asda. The station is one of the busiest in North Wales, surpassed only by Bangor in terms of passenger numbers. There are regular services throughout the day including hourly services (each way) from Holyhead to Birmingham International / Cardiff Central and to Manchester Piccadilly / Manchester Airport. Six trains per day operate on the Conwy Valley Line to Blaenau Ffestiniog. Avanti West Coast run two trains each way per day from London Euston to Holyhead. Services are reduced on Sundays.

Car Parking

11.13 There is one car park servicing the main centre on Osbourne Road which offers 33 spaces. Prices range from 60p for 1 hour up to £4.20 for 24 hours. There is, however, on-street parking along parts of Conway Road and most of the residential streets nearby.

Levels of Crime

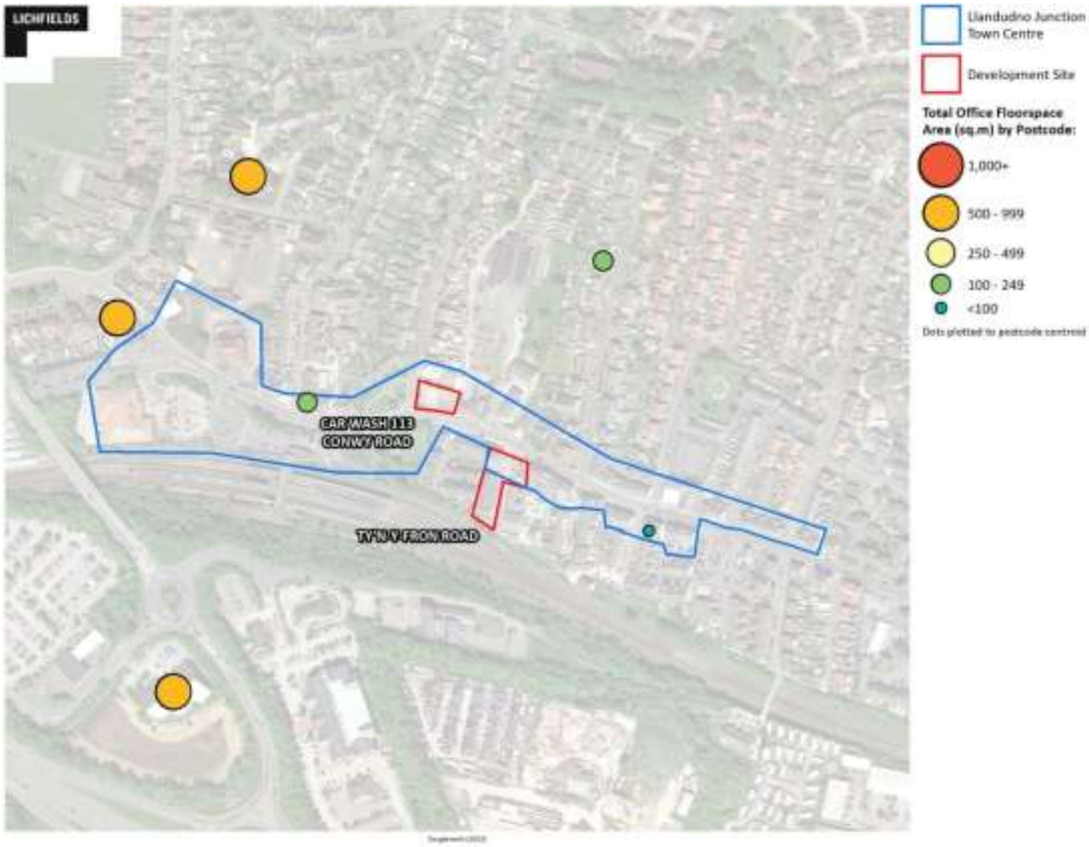
11.14 There were 930 crimes reported in Llandudno Junction in the year to March 2022, indicating a crime rate of 99.5 crimes per 1,000 people. This is lower than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period and is the 8th highest rate of crime of the towns assessed in this study[7].

[7] Based on the LL31 postcode area which also includes Deganwy. https://www.ukcrimestats.com/Postcode_Districts/LL31

Llandudno Junction as an employment centre

Quantum, Types and Quality of Existing Floorspace

Figure 11.2 Provision of office floorspace in Llandudno Junction



Source: VOA / Lichfields

11.15 There is very little office use within Llandudno Junction's main centre. VOA data shows total office floorspace of around 540 sqm across 5 units along Conway Road. Three of these units are freestanding small office buildings serving car hire/taxi/car sales businesses. One is above a retail unit and one is over both floors of a converted small residential property.

11.16 There is however significant office space outside the centre, with the VOA indicating around 10,100 sqm of space in out-of-town business parks. A majority of this is accounted for by the c.7,500 sqm Welsh Government Building on Sarn Mynach located approx. 0.6 km to the east of the centre. There is also around 1,000 sqm at Conwy Business Centre south of the centre over the rail line, and around 700 sqm at Anson House approx. 0.8km north east of the centre. Plas Bodwell on Broad Street also offers around 730 sqm just north of the centre on Broad Street.

11.17 CoStar indicates that all office space within the main centre is rated as 2-star quality or below.

Representation of Businesses

11.18 Along Conway Road in the main centre there are freestanding office buildings servicing Avis Rent-a-Car, Castle Cabs and North Wales Motors, as well as a financial advisor and cleaning services office. The nearby Plas Bodwell is occupied by the North Wales Housing Association. Conwy Business Centre houses a number of firms including architects, construction offices, a communications agency and a marine fuels trader head office.

Stock Vacancy and Turnover

11.19 The limited CoStar data indicates no vacant office space within Llandudno Junctions' main centre and there were no obvious vacant office units within the main centre based on a visit in December 2021. Furthermore, a review of commercial property sites found no units within the main centre or any of the out-of-town locations. This would suggest a vacancy rate of zero or close to zero, and certainly below the Conwy and Wales average rates.

Rental Levels

11.20 CoStar data indicates rents of around £110 per sqm in the main centre along Conway Road, rising to around £140 in some of the more modern out-of-town units.

Public Services

11.21 There are no public services in the centre of the town.

Operator Requirements

11.22 Richard Baddeley & Co. is not aware of any operator requirements for the town for retail or office use. There were no requirements identified from Lichfields' assessment of the Requirements List as of 26th May 2022.

Customer views

11.23 As part of the household survey, respondents were asked if they had used shops and services in Llandudno Junction in the last year. Of those who had used shops/services in the town, respondents were asked what they like and dislike about the town centre.

11.24 On balance levels of satisfaction were mixed. About 33% indicated there was nothing they like about the centre. However, 70% of respondents did not mentioned factors they dislike about the centre. These results suggest levels of satisfaction are neither positive nor negative, but are mixed.

11.25 Over 22% of respondents like Llandudno Junction because of it is close to home, which emphasises the importance of the centre's local role. The main factors mentioned (by 5% of respondents or more) were:

- *factors liked*: good range of supermarkets (11%); good range of shops (6%); car parking easy to find (5%); and.
- *factors disliked*: poor range of shops (5%); hard to find car parking (5%).

11.26 These results confirm the mixed customer views on the centre. The availability of food stores appears to be the main favourable attribute.

Business Views

11.27 The business survey received three responses from business located in Llandudno Junction.

- There were some mixed feelings on parking within the centre. Whilst there is usually parking available, one respondent indicated that the new 50p per hour charge on the Osbourne Road car park means people who would otherwise stop to do some quick shopping now go elsewhere. The charge was also said to cause people to park down residential streets. Another respondent stated an issue with people parking up in the area before disappearing on the train, sometimes for days.

- A respondent stated that the centre is often maligned by road/utilities works that are started but never finished in a reasonable time.
- It was suggested that there is no longer much of a reason to come to the area due to parking issues and availability of supermarkets elsewhere. New shops such as greengrocers and butchers may bring locals back into the centre to shop.

SWOT Analysis

Strengths

- The centre has a good provision of food supermarkets, with the Asda and Iceland stores being a short walk from the centre.
- The centre has a reasonable range of non-retail services, in particular takeaways and hairdressers/beauty parlours.
- The shop vacancy rate is relatively low when compared with other centres in the County Borough.
- The centre has good public transport links including the railway station.
- The main public car park is accessible at the heart of the centre.

Weaknesses

- Llandudno Junction is the smallest of the designated town centres in terms of the number of retail and service uses.
- The shopping area is relatively fragmented.
- The centre has a low proportion of comparison goods outlets and a limited number of national multiples.
- The centre has the shortest average length of stay (53 minutes) for customers using the centre.
- The centre has a relatively localised catchment area.
- The shopping environment along Conway Road suffers from relatively high levels of through traffic, although pavements are reasonably wide.
- Shop units are primarily small period buildings.
- On balance, the centre has mixed levels of customer satisfaction.

Opportunities

- There is an opportunity to improve shops and services by utilising vacant premises.
- Future population and expenditure growth provides an opportunity to strengthen shops and services to improve Llandudno Junction's local shopping/service role.

Threats

- The polarisation of investment toward larger centres could reduce demand for premises.
- The quality and age of retail premises in the centre could restrict the ability to attract modern retailers/operators.
- The longer-term impact of Covid-19, Brexit and now the cost of living crisis may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies.

Llandudno Junction – Option Development

11.28 Llandudno Junction is a long, linear centre which sees high volumes of traffic serving as a link between the A55, Conwy and Llandudno. The centre itself predominantly serves the local population with no tourism presence and consists of disjointed clusters of retail units along a long stretch of Conway Road. The centre also sees high level of traffic due to the abundance of employment and leisure uses on surrounding business parks, as well as Asda and Tesco supermarkets. This includes the cinema leisure complex to the south of the rail line, as well as a large area to the immediate east of the town centre boundary which is dominated by car showrooms and servicing centres.

11.29 Llandudno Junction does not currently feel or operate like a town centre, with only small clusters of retail and food/drink units along a long stretch of road. The centre also has low footfall as shoppers have a range of supermarket options nearby that has diluted the convenience offer on the High Street. Allowing flexibility in uses away from retail has helped to ensure that the centre has a relatively low level of vacancy and this should continue. In addition, there are a number of properties and shop frontages within the centre that require investment to improve the look and feel of the centre.

Site Specific Development Opportunities

Car Wash, 113 Conwy Road

11.30 This former petrol station site is sits on Llandudno Junctions main street and is currently in use as a hand car wash. According to commercial agents the site is well known as a potential development site but has not come forward due to flood risk issues. Flood risk mapping shows that the site falls within an area of low flood risk, along with many of the surrounding small units and the residential properties along the eastern side of Marl Drive. The site is currently on the market. There is a Labour Club and car park to the rear of the site which could become part of a larger development opportunity. If flooding issues are resolved the site would be suitable for residential or mixed-use development.

12.0 Llanrwst Town Centre

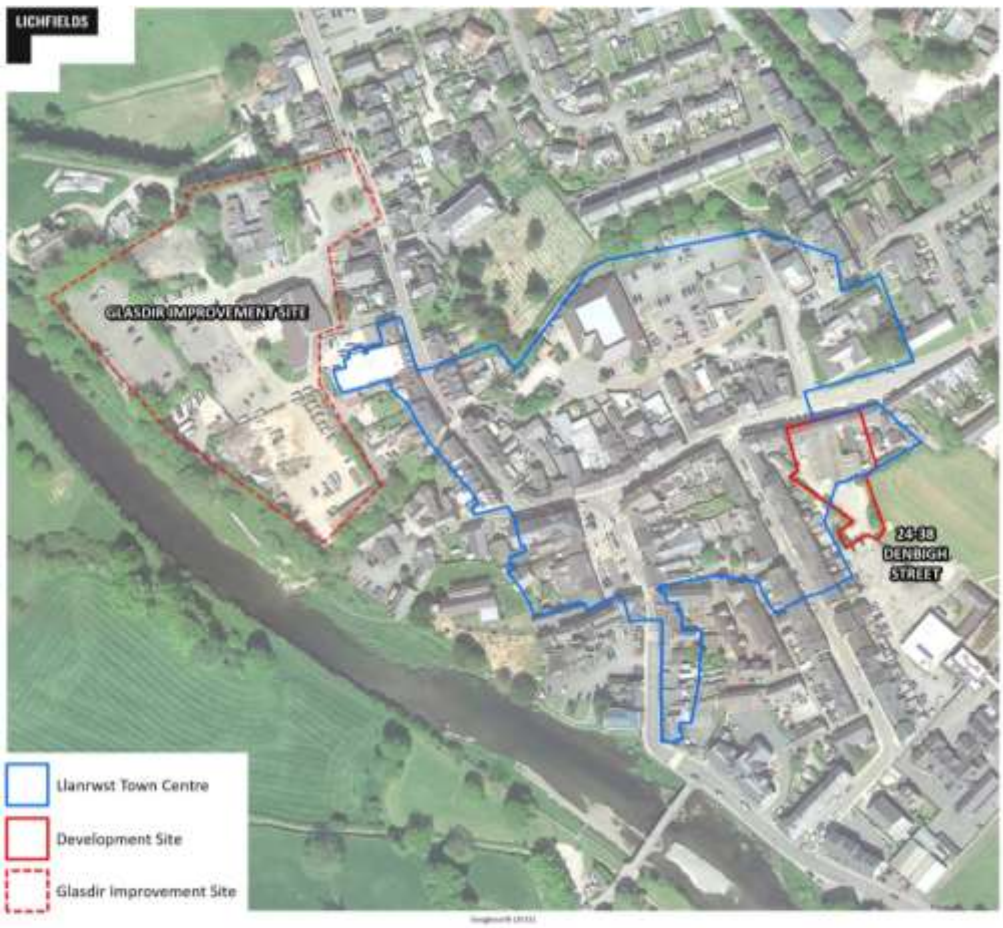
Introduction

12.1 Llanrwst town centre is one of five designated Town Centres in the Conwy Replacement Local Development Plan – Preferred Strategy. It was also designated as a Town Centre in the Adopted LDP. It is a second-tier centre in the hierarchy of centres in the County Borough, below the Sub-Regional Shopping Centre of Llandudno.

12.2 Llanrwst is a small historic market town located towards the heart of the County Borough along the river Conwy. Being less than a mile from the edge of Snowdonia, the town benefits from tourism.

12.3 The town's main centre is based around Ancaster Square and has expanded along the main streets of Station Road (A470), Denbigh Street (A548), Bridge Street and Watling Street. There is Co-op supermarket to the north of the centre, as well as a public library and swimming pool just outside the centre boundary.

Figure 12.1 Llanrwst town centre and potential development/improvement sites



Source: Lichfields

Llanrwst as a retail and service destination

12.4 Llanrwst has 82 retail and service units. The diversity of uses is set out in Table 12.1, compared with the Goad Plan UK average and the average for all centres in Conwy County Borough.

Table 12.1 Mix of shops/service uses in Llanrwst

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	22	26.8	31.9	29.0
Convenience goods retail	7	8.5	8.7	9.7
Financial/professional services	8	9.8	7.7	9.0
Restaurants/cafés	6	7.3	10.7	10.0
Pubs/bars	2	2.4	4.6	4.9
Hot food takeaways	3	3.7	5.7	6.2
Other non-retail services	13	15.9	17.4	16.5
Vacant	21	25.6	13.4	14.7
Total	**82**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021

12.5 The mix of uses is broadly consistent with the UK and Conwy averages. However, the food/beverage sector (restaurants/cafés/takeaways/pubs/bars) is below average. There were 21 vacant retail units within the centre at the time of Lichfields' survey (October 2021), a vacancy level that is nearly double the UK and County Borough averages.

12.6 Llanrwst has a small selection of comparison shops (22 outlets). Not all Goad comparison categories are represented and the choice of outlets in represented categories is limited (five or less outlets). Table 12.2 provides a breakdown of comparison units by category.

Table 12.2 Mix of comparison goods shops – Llanrwst

Type	Number units	% units	UK average
Clothing and footwear	0	0.0	21.5
Furniture, carpets and textiles	5	22.7	7.7
Books, arts, cards and stationers	3	13.6	6.1
Electrical, music and photography	0	0.0	9.3
DIY, hardware and homeware	1	4.5	6.9
China, glass and gifts	1	4.5	5.5
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	3	13.6	12.0
Variety, department and catalogue	0	0.0	1.7
Florists, nurserymen and seedsmen	1	4.5	2.2
Toys, hobby, cycle and sports	3	13.6	5.5
Jewellers	1	4.5	5.1
Charity and second-hand shops	3	13.6	10.0
Other comparison goods retailers	1	4.5	5.2
Total	**22**	**100.0**	**100.0**

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021

12.7 Llanrwst has a good provision of furniture/carpets/textile shops for a centre of its size. Boots, Co-op, Londis and the Spar are the only national multiple retailers, (excluding charity shops). Most outlets are small independent traders.

12.8 The centre has a reasonable range of service uses (32 in total), but the choice of outlets is limited in each category apart from hairdressers / beauty parlours, as shown in Table 12.3.

Table 12.3 Mix of service uses – Llanrwst

Type	Number units	% units	UK average
Restaurants/cafés	6	20.7	24.0
Fast food/takeaways	3	10.3	14.9
Pubs/bars	2	6.9	11.8
Banks/other financial services	5	17.2	8.4
Betting shops/casinos/amusement	0	0.0	3.8
Estate agents/valuers	3	10.3	7.8
Travel agents	1	3.4	1.5
Hairdressers/beauty parlours	9	31.0	26.3
Launderettes/dry cleaners	0	0.0	1.7
Sub-total	**29**	**100.0**	**100.0**
Other	3		
Total	**32**		

Source: Lichfields' land use survey October 2021 and Experian Goad Plan UK average 2021.

Retail catchment area

12.9 The household survey results indicate only 19% of respondents across the study area had used shops and services in Llanrwst during the last year, which was the lowest market share of the six main centres in the County Borough. The centre attracted 67% of respondents living in the local area (Zone 3 – Rural). The centre's lowest market share was only 5% in Zone 2 – East. Only 0.6% of the study area respondents indicated that they do most of their non-food shopping in Llanrwst.

12.10 The retail capacity analysis suggests Llanrwst attracts 65% of its trade from the local Zone 3 – Rural. Llanrwst predominantly serves a local catchment area in the south and west of the County Borough.

12.11 The household survey results indicate about 60% of respondents using the centre stay for less than an hour and the average length of stay is 66 minutes. Llanrwst has the third longest average length of stay in the County Borough, behind Llandudno (98 minutes) and Conwy (78 minutes).

Shop rental levels

12.12 The VOA's latest Zone A retail rents indicate the highest prime pitch Zone A rents achieved in Llanrwst are only £145 per sqm, lower than the other main centres in the County Borough. This rental level is achieved in the heart if the centre around Ancaster Square. In peripheral parts of the centre Zone A rents range from £80 to £125 per sqm.

Public Transport Linkages

12.13 Llanrwst Train Station is located just to the east of the main centre and lies on the Conwy Valley Line from Llandudno Junction to Blaenau Ffestiniog. North Llanrwst Station is also located just 0.5km north of the centre. Six trains run each way Monday to Saturday (approximately every three hours), with four trains each way on Sundays.

12.14 There are bus stops on Denbigh Street, Watling Street and Bridge Street. Services run north towards Llandudno Junction/Llandudno and Cerrig, and south to Betws-y-Coed.

Car Parking

12.15 The centre's main car park is on Watling Street and offers 49 spaces. Prices range from 60p for one hour up to £4.20 for 24 hours. There is however free parking just outside the centre behind the public library with around 214 spaces available. There is also some on-street parking along Watling Street.

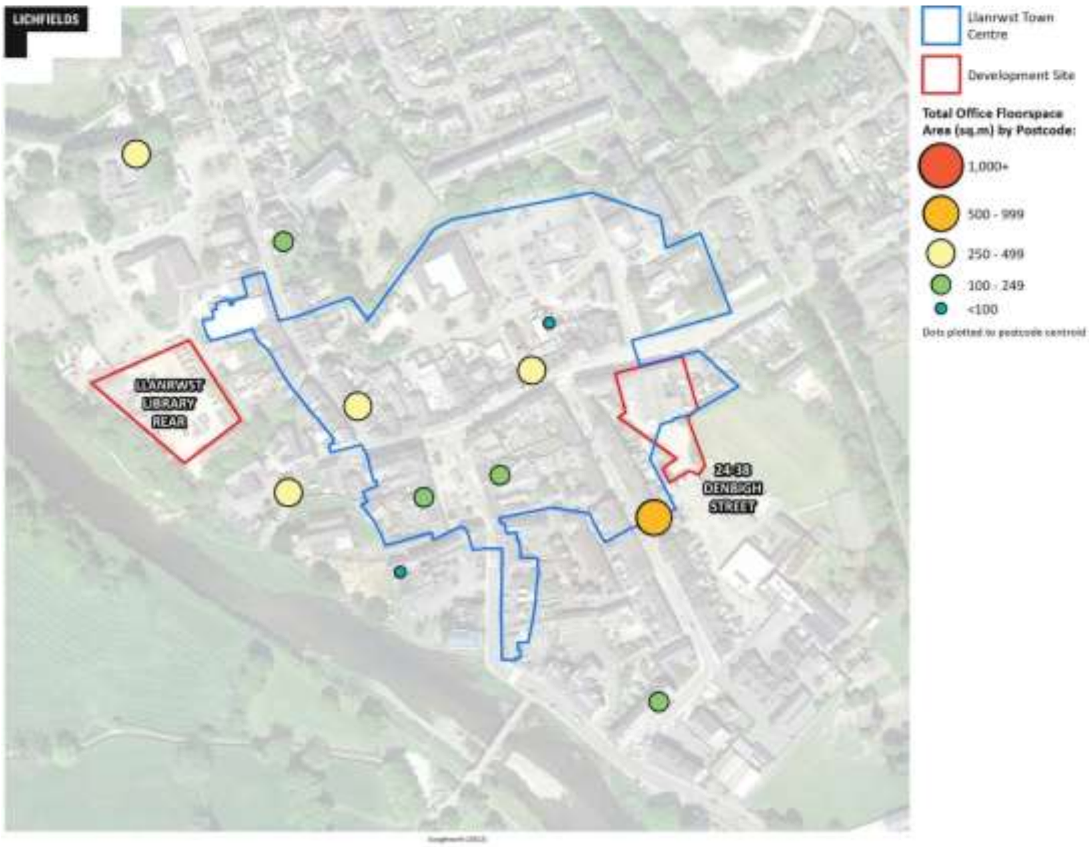
Levels of crime

12.16 There were 269 crimes reported in Llanrwst in the year to March 2022, indicating a crime rate of 80.9 crimes per 1,000 people. This is lower than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period and is the 11th highest rate of crime of the towns assessed in this study[8]. Only Llanfairfechan and Deganwy had lower rates of crime.

Llanrwst as an Employment Centre

Quantum, Types and Quality of Existing Floorspace

Figure 12.2 Provision of office floorspace in Llanrwst



Source: VOA / Lichfields

12.17 VOA data indicates around 3,100 sqm of office floorspace within the main centre across 21 units. These units are predominantly on the first and second floors of terraced buildings, typically with retail or hospitality on the ground floor. The largest of these are the Zip World

[8] https://www.ukcrimestats.com/Subdivisions/PRW/20647/

Base Camp on Denbigh Street (470 sqm), the first floor of the new Library building 'Glasdir' on Station Road (just outside the centre boundary, 400 sqm) and both floors of the Old Tannery Building on Willow Street (combined 280 sqm). There are six units on Ancaster Square including the Town Council offices, four on Station Road, four on Watling Street, with the rest dotted on smaller streets within the centre. CoStar indicates that office space is generally of 2/3 star quality.

12.18 There is some out-of-town office provision including around 650 sqm of office space at an office block at Parc Ty Gwyn 1.3 km south of the centre alongside a few offices uses on Nebo Road and School Bank Road including an NHS office.

Representation of Businesses

12.19 Businesses using office space in Llanrwst are predominantly solicitors, accountants and financial advisors. There is also a Town Council Office and the head office of Zip World.

Stock Vacancy and Turnover

12.20 There were numerous vacant units within the centre during a visit in December 2021, however they were typically retail units with office above. There were also vacant buildings that looked suitable to conversion to office use including a former dental surgery on Station Road and a former bank building on Station Road and the Llanrwst Institute building on Denbigh Road. A review of commercial property websites in March 2022 showed multiple units in the library building are available for rent, ranging from 50 – 150 sqm in size. Overall, this would indicate a medium level of vacancy within the centre.

12.21 There are vacant offices and warehousing on the outskirts of the town which were constructed in 2019 but agents state that there has been no demand for this accommodation to date.

Rental Levels

12.22 CoStar data indicates average office rents of around £110 per sq.m in the centre with a 10-year average of around £100 per sq.m.

Public Services

12.23 Glasdir, the local library building owned by the Local Authority houses a range of community services and the Coleg Llandrillo Menai College. Llanrwst swimming pool sits behind the units along Watling Street.

Operator Requirements

12.24 Richard Baddeley & Co. is not aware of any operator requirements although it considers that if the Council yard located behind Glasdir currently used as a gritting facility became available there could be interest from convenience retailers. However, the Council has previously struggled to find alternative sites for the relocation of the facility. There would also be interest in the livestock market site on Parry Road, although this is well outside the centre.

12.25 There were no requirements identified in Lichfields' assessment of the Requirements List as of 26th May 2022.

Customer views

12.26 As part of the household survey, respondents were asked if they had used shops and services in Llanrwst in the last year. Of those who had used shops/services in the town, respondents were asked what they like and dislike about the town centre.

12.27 On balance levels of satisfaction were positive. Only 13% indicated there was nothing they like about the centre compared with 72% who indicated there was nothing they dislike about the centre. The different (59 percentage points) was the highest in the County Borough, suggesting a high level of overall satisfaction with the centre.

12.28 About 23% of respondents like Llanrwst because of it is close to home, which emphasises the importance of the centre's local role. The main factors mentioned (5% of respondents or more) were:

- *factors liked*: friendly atmosphere (18%); nice shopping environment (14%), good independent shops (11%); good range of shops (9%); habit/familiarity (8%); good market (5%); and.
- *factors disliked*: too many vacant shops (6%); poor range of supermarkets (5%).

12.29 Llanrwst rates most favourably in terms of environmental factors, independent shops and friendly atmosphere.

Business Views

12.30 The business survey received nine responses from businesses based in Llanrwst or 9.8% of the total responses. A summary of the main points raised is provided below:

- In terms of improving premises, one business stated that they are endeavouring to make better use of their limited space, whilst another seeks to make more general improvements to their working environment as well as the appearance and aesthetics of their premises.
- Asked about factors currently affecting business performance in the town, respondents were positive about the increased level of staycations and more people shopping locally.
- Respondents were less positive about poor weather affecting the town and the ensuing issues with flooding.
- The closure of banks was purported as a major reason for falling footfall by one respondent.
- On strengths and weaknesses, a number of comments about the Council were made, including that the council is too restrictive, and businesses do not feel supported. One respondent stated that they are aware of several premises that have been refused permission for café/restaurant use in the town. Another said they had attempted to open a shop but were told it must be located inside the town centre, which ultimately was too prohibitive, and the business was shut down as a result.
- It was noted that low rents make the town attractive, but there are often issues in achieving permission for certain uses by the council.
- The number of vacant properties and the need to improve this was highlighted by multiple respondents.
- Businesses were positive about the natural beauty of the area, the strong local community and sense of safety in the town.
- Difficulty in finding skilled staff within the locality, particularly for managerial or technical roles, was mentioned as a key difficulty by one firm.

12.31 Llanwrst received more suggestions for improvements and making better use of properties than any other town in the study, showcasing the highly engaged local business community. These suggested improvements include:

- A local dog park. It was suggested that the land next to the café over the Pont Fawr bridge would be ideal for this and would require relatively little investment.

- Improvements to the playground in Gwydir Park to attract families.
- The foundations of the old bowling club could be repurposed as a bandstand/outdoor events space.
- A sheltered picnic area with grilling space by the river.
- Improvements to the square including more greenery, prioritisation of pedestrians/cyclists including bike racks and possible pedestrianisation and seating.
- Continuation and better signposting of free parking.
- Better signposting of the town and wayfinding within the town. For example, it was suggested that many people drive past the Glasdir car park due to poor signposting but being unable to easily turn around simply carry on through to Betws-y-Coed rather than stop.
- It was indicated that the small amount of parking available in the square is not put to good use as locals often park up there all day which can restrict access for tourists and make the square less attractive.
- Improvements to public toilet facilities, footpaths, shop frontages and better seating.
- Changes to allow for increased outdoor eating and drinking – partial pedestrianisation, traffic easing or widened pavements.
- The almshouse should be returned to public use.
- Bringing vacant properties back into use – particularly those around the square.
- A museum and more cultural and historic signposting within the town.
- A dedicated coach drop off and pick up point.

SWOT Analysis

Strengths

- Llanrwst has a loyal local customer base and has a comparatively large catchment area and rural hinterland.
- For a small centre, Llanrwst has a good mix of shops and services, in particular restaurants/cafés and hairdressers/beauty parlours.
- The Co-op store is the key anchor for the centre, catering for main and bulk food shopping.
- It is a compact centre with an attractive central square, river and stone bridge, with important historic buildings.
- There is reasonable provision of off-street car parking.
- On balance, the centre has relatively high levels of customer satisfaction, particularly of terms of atmosphere, shopping environment and the presence of independent shops.

Weaknesses

- Llanrwst is a relatively small-town centre with a limited number of national multiples.
- The centre has a very high retail vacancy rate, suggesting the supply of premises is higher than operator demand. Flood risk along Station Road in particular is contributing towards a cluster of vacant and hard to let properties.
- Vacant units have an adverse impact on the quality of the shopping environment.

- The shopping environment throughout the centre suffers from relatively high levels of through traffic and narrow pavements in places.
- Shop units are primarily small period buildings with many requiring conversion and/or extensive refurbishment to bring them up to modern standards.

Opportunities

- There are several potential redevelopment opportunities on the periphery of the centre.
- Increased 'staycation' demand and visits to nearby Snowdonia National Park could increase the number of tourist visitors to the town, providing spin off benefits to shop and services in the town centre.
- There is an opportunity to improve shops and services by utilising vacant premises.
- Future population and expenditure growth provides an opportunity to strengthen shops and services to improve Llanrwst's role.

Threats

- The polarisation of investment toward larger centres could reduce demand for premises.
- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators.
- The longer-term impact of Covid-19, Brexit and now the cost of living crisis may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies.

Llanrwst – Option Development

12.32 As evident from the responses to the business survey, there is a highly engaged community in Llanrwst with a raft of positive suggestions for improving the town for both locals and visitors. However, consultees also indicate that there is also a strong community which are wary of major changes to the town.

12.33 The primary issue facing the town is vacant properties. Llanrwst suffers from the highest level of vacant retail units in this study at 21, or 25.6% of all 82 retail units in the centre. Due to the size of the centre, the abundance of empty shops is clear to visitors and detracts from the potentially bustling feel of the centre.

12.34 Llanrwst is known as a tourist location and attracts visitors looking to explore Snowdonia and other attractions in North Wales but competes in this regard with other similar locations such as Betws-y-Coed. The town should therefore look to diversify the tourism offer and more effectively market itself as a gateway to Snowdonia.

12.35 The centre is located on the banks of the river Conwy with picturesque views of Snowdonia, however there is an opportunity to better capitalise on this location and make better use of the riverside setting.

12.36 Finally, there are opportunities to improve the look and feel of the centre, and in particular Ancaster Square to provide a better experience for both locals and visitors.

12.37 Objectives for Llanrwst are as follows:

- Develop a strategy for filling vacant units;
- Diversify the tourism offer; and,
- Improve the look and feel of the centre.

Develop a strategy for filling vacant properties

12.38 As noted above, Llanrwst has the highest share of vacant properties of any town within this study. A north-western area of the centre falls within a high flood risk zone which will affect market attractiveness and limit uses, however there are many vacant properties throughout the centre and a strategy to attract new tenants and work with owners to bring properties back into use should be considered.

12.39 In this regard it was noted by survey respondents that whilst the town is attractive due to low rents, a lack of flexibility in allowing change of use can detract potential investment. In addition, the town centre boundary is large, and consolidation of the boundary should be considered to concentrate the retail offer around Ancaster Square.

12.40 It may also be worth exploring how to attract more operators such as Zip World, who require office 'base camp' premises for attractions around Snowdonia.

Diversify the tourism offer

12.41 Due to the natural beauty and range of things to do in Snowdonia, small rural towns such as Llanrwst often serve as stayover locations for those travelling, or as bases for those looking to explore a range of activities over a few days. This trade brings with it a demand for B&Bs, pubs and restaurants, as well as weekend day activities such as local markets. In this regard, Llanrwst has fallen behind some of its neighbouring towns such as Betws-y-Coed in terms of visitor numbers.

12.42 Suggestions from local businesses included increasing the signage and prominence of heritage and cultural assets within the town; improving the facilities at Gwydir Park; redeveloping the bowling club site into an events space; and establishing a picnic and grilling area along the riverside. In addition, the introduction and or/improvement of local activities such as walking routes, mountain bike trails, playgrounds and camping/glamping facilities would increase the opportunities for attracting overnight visitors and families to the town.

12.43 As also noted by a respondent to the business survey, Llanrwst has no dedicated drop off/pick up point for coaches, which limits its potential as a day trip location, particularly for elderly tourists.

12.44 Llanrwst features a riverside walk along the river Conwy, which runs the length of the centre and northwards to the pedestrian suspension bridge at Gower Road. Whilst part of this route is on a raised wooden path, most of it is a single-track dirt path. The route is also poorly linked and signposted from the centre making it easy to miss. Improving the route itself as well as the links through to the centre and signage would help take full advantage of the town's riverside setting. This may also tie into to the potential improvement around Glasdir, where new links with the riverside could be established.

Improve the look and feel of the centre

12.45 There are opportunities to improve the look and feel of Llanrwst, particularly around Ancaster Square and by allowing for increased pedestrian and cyclist priority.

12.46 Ancaster Square sits at the centre of the town and features a range of attractive 16th century buildings around its perimeter. The square currently features a small car park with 6 spaces and a small, paved area around the clocktower. The A470 (Bridge Street) runs through the square and at its widest point could accommodate four cars side-to side. In addition, at this point there are also two car parking spaces next to the road which further eat into the pedestrian area. Whilst Bridge Street is an A-road, it is by far at its widest in Ancaster square, being much narrower elsewhere in the centre, and its junction with Denbigh Street (A548) in the north-eastern corner of the square is also very wide, especially considering this short stretch of Denbigh Road is one-way.

12.47 Overall, the width of the road, the junction and the car parking spaces remove any sense of pedestrian priority from the square and limits its use as an events space. Road narrowing and traffic calming measures such as the removal of curbs and paving of the road level with pedestrianised areas could restore the market square feel of the area and improve the experience of pedestrians and cyclists. This would also allow for improved greening through planters, more benches, and more opportunities for outdoor eating/drinking and events. Consolidation of the parking in the square should also be considered, as it was suggested by survey respondents that this parking is often not used by short-stay shoppers but by locals parking there for long periods.

12.48 Another thing noted by survey respondents was the poor signposting of the town, its attractions and parking for those coming in via the A458. In particular, there is no real gateway into the town and it was suggested that many people have driven past the centre's main car park at Glasdir and arrive in the centre of town before any obvious signposting, meaning many do not attempt to turn around and simply carry on through to Betws-y-Coed.

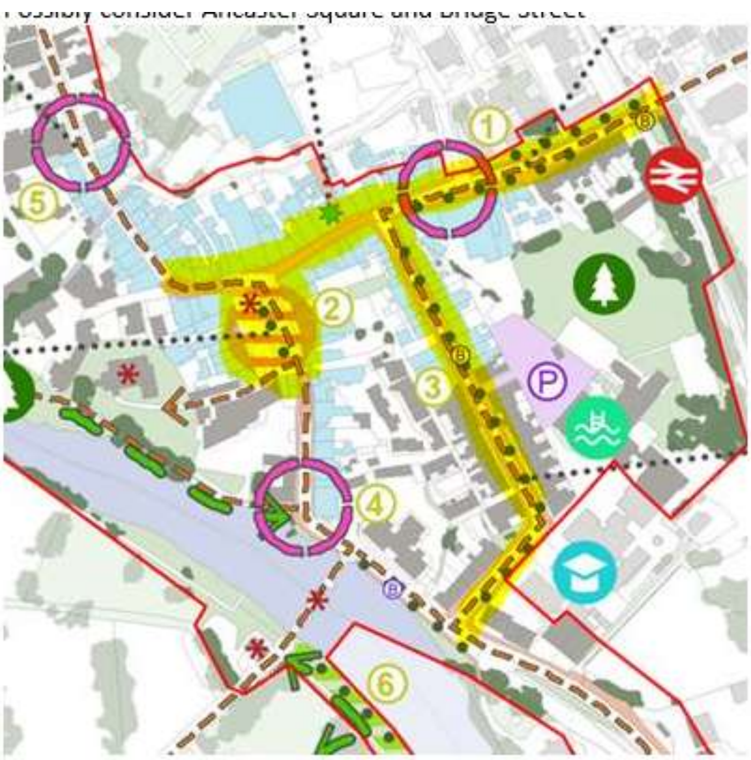
12.49 In general, there are opportunities around Llanrwst centre to improve the experience for pedestrians and cyclists by improving pavements and consolidating parking. The town also could benefit from more outdoor eating and drinking space to encourage visitors in good weather. Local businesses within the centre should also be encouraged and supported to maintain the aesthetics of their premises, and as stated above, efforts made to fill vacant properties.

12.50 The draft TEP Green Infrastructure Conwy Project recommends that for Llanrwst Town Centre there should be a particular focus on the key route from railway to school and town centre public realm. Recommendations are summarised in Figure 12.3, but include:

- **Denbigh Street Gateway:** Create a green link from the railway station to the town centre with tree and hedgerow planting to existing green space boundary adjacent to flats on Heol Scotland and businesses on Plough Street. On southern section of Denbigh Street consider narrowing carriageway and defining parking bays and carriageway with different surfacing to create pedestrian priority between Watling Street and Bridge Street.
- **Ancaster Square:** Key nodal point at the heart of the town. Enhance public space through surfacing and street furniture and provide more opportunities for tree planting and raised planters. Extend the square across Bridge Street and create greater pedestrian priority through carriageway narrowing, introducing informal raised crossings and surfacing changes to the road. Consider removing the layby and replacing it with tree and rain garden planting. Encourage further outdoor dining and introduce movable raised planters to define seating areas.
- **Watlington Street Connection:** Key connection to school, swimming pool and car park and Active Travel route. Enhance environment for pedestrians and cyclists to improve links through creation of wider footways and improved on road cycle facilities.
- **Bridge Street Approach:** Southern town centre gateway. Define entrance to the town through raised table, change in carriageway surfacing and carriageway pinch point with tree planting or bollard to slow vehicle speeds. Widen footways where possible to improve pedestrian environment and accessibility for all.
- **Station Road Approach**. Northern town centre gateway. Define entrance to the town through raised table, change in carriageway surfacing and carriageway pinch point with tree planting or bollard to slow vehicle speeds.

- **Riverside Link:** Green link through the town with opportunity to enhance waterfront access and encourage interaction. Improve footpaths, seating, signage and street furniture.

Figure 12.3 TEP Draft Green Infrastructure Masterplan for Llanrwst Town Centre



Source: TEP (2022): Transforming Towns Green Infrastructure Project – Conwy Opportunities

Site Specific Development Opportunities

<u>Glasdir/Riverside Improvement Area</u>

12.51 In 2021, Llanrwst's library relocated to Glasdir, a building which sits just outside the north-western town centre boundary. To the west of Glasdir there is a large car park and overspill car park which also serves as the primary car park for visitors to Llanrwst. To the south of this is an area currently used as a road gritting depot by the Council. To the north of Glasdir is the headquarters of North Wales Police in Llanrwst, along with further car parking.

12.52 With the relocation of the Library to Glasdir and a use for the remining floorspace in the building yet to be found, it is worth considering a consolidation of other public services in Llanrwst, such as the police, into the building. This would create a public services hub, as well as freeing up the site of the current police building. Similarly, the site of the road maintenance depot could become available if the depot were to be moved to another, out-of-centre site.

12.53 This whole area, incorporating the possible public services hub at Glasdir, could form a large improvement area which could be utilised to improve the gateway into the centre when travelling from the north, as well as providing improved public realm and linkages to the riverside.

<u>24-30 Denbigh Street</u>

12.54 This site comprises a row of former retail units within historic residential properties. The rear of the properties has been extended with warehouse/storage space, whilst residential units occupy the top floors above the retail space. Commercial agents confirmed that this site was sold in late 2021.

12.55 The site has been subject to several planning applications for conversion of the warehouse/storage space to the rear into further residential apartments. These applications include:

- 0/47818 – Manchester house 24 Denbigh Road - *Conversion of retail area to provide entry level accommodation to existing upper-level residential accommodation* – Approved with conditions Oct 2020
- 0/48255 – 26 – 30 Denbigh Street - *Conversion of warehouse and storage areas to form two residential dwellings (with home office), replacement of asbestos roof with insulated sheeting, re-cladding of external walls and elevational amendments* – Approved with conditions 18/06/22.

12.56 A visit in 2022 showed that all ground floor retail units are now vacant, with the exterior of the building newly painted and shop frontages refurbished.

13.0 Deganwy Local Centre

Introduction

13.1 Deganwy is designated as a Local Centre in both the adopted Conwy LDP and the Replacement LDP – Preferred Strategy. It is a third-tier centre in the hierarchy of centres in the County Borough, below the Sub-Regional Shopping Centre at Llandudno and designated Town Centres.

Figure 13.1 Deganwy's main centre (right) and the River Conwy (left)

13.2 Deganwy's centre lies along the banks of the River Conwy on a 400m stretch of Station Road (A456). To the south/west side of the road lies Deganwy Station and car park, the rail line, and then a promenade and beach. On the north / east side of the road is a long parade of residential and retail units looking out onto the river.

Deganwy as a retail and service destination

13.3 Deganwy has 31 retail and service units. The diversity of uses within the centre is set out in Table 13.1, compared with the Goad Plan UK average and the average for all centres in Conwy County Borough.

Table 13.1- Mix of shops/service uses in Deganwy local centre

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	7	22.6	31.9	29.0
Convenience goods retail	1	3.2	8.7	9.7
Financial/professional services	2	6.5	7.7	9.0
Restaurants/cafés	7	22.6	10.7	10.0
Pubs/bars	2	6.5	4.6	4.9
Hot food takeaways	2	6.5	5.7	6.2
Other non-retail services	7	22.6	17.4	16.5
Vacant	3	9.7	13.4	14.7
Total	**31**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

13.4 The centre has a much higher proportion of restaurants / cafés and other non-retail services than the UK and Conwy averages. Retail outlets occupy only 25.8% of units in the centre compared with the County Borough average of 40.6%. This mix of uses reflects the centre's dual role as a local shopping/service and tourist destination. There were three vacant retail unit within the centre at the time of Lichfields' survey (January 2022) and the vacancy rate is below the UK and County Borough averages.

13.5 The centre has a limited selection of comparison shops (7 outlets). Only 5 of the 14 Goad comparison categories are represented and the choice of outlets in represented these categories is limited (1 or 2 outlets). Table 13.2 provides a breakdown of comparison units by category. Co-op is the only national multiple retailer. All other outlets are small independent traders.

Table 13.2 - Mix of comparison goods shops – Deganwy local centre

Type	Number units	% units	UK average
Clothing and footwear	1	14.3	21.5
Furniture, carpets and textiles	1	14.3	7.7
Books, arts, cards and stationers	0	0.0	6.1
Electrical, music and photography	0	0.0	9.3
DIY, hardware and homeware	0	0.0	6.9
China, glass and gifts	1	14.3	5.5
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	2	28.6	12.0
Variety, department and catalogue	0	0.0	1.7
Florists, nurserymen and seedsmen	0	0.0	2.2
Toys, hobby, cycle and sports	0	0.0	5.5
Jewellers	0	0.0	5.1
Charity and second-hand shops	0	0.0	10.0

Type	Number units	% units	UK average
Other comparison goods retailers	2	28.6	5.2
Total	**7**	**100.0**	**100.0**

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

13.6 Deganwy has a small range of service uses (20 in total). The local centre has more service uses than the other local centres at Llanfairfechan, Penmaenmawr and Kinmel Bay. Despite the reasonable number of service uses for a centre of its size, the choice of outlets in each category is limited, with the exception of restaurants/cafés and hair/beauty parlours, as shown in Table 13.3.

Table 13.3- Mix of service uses – Deganwy local centre

Type	Number units	% units	UK average
Restaurants/cafés	7	38.9	24.0
Fast food/takeaways	2	11.1	14.9
Pubs/bars	2	11.1	11.8
Banks/other financial services	0	0.0	8.4
Betting shops/casinos/amusement	0	0.0	3.8
Estate agents/valuers	1	5.6	7.8
Travel agents	1	5.6	1.5
Hairdressers/beauty parlours	5	27.8	26.3
Launderettes/dry cleaners	0	0.0	1.7
Sub-total	**18**	**100.0**	**100.0**
Other	2		
Total	**20**		

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

Retail catchment area

13.7 The retail capacity analysis suggests Deganwy attracts 58% of its trade from the local Zone 4 - West. Most of the remaining trade comes from tourist visitors.

Shop rental levels

13.8 The VOA's latest Zone A retail rents indicate the highest prime pitch Zone A rents achieved in Deganwy are £175 per sq.m, which is relatively high when compared with other smaller centres in the County Borough.

Public Transport Linkages

13.9 Deganwy's centre lies along the North Wales Coast Line and has its own station, lying in between Llandudno and Llandudno Junction stations. The station is serviced by a regular shuttle between the two, which provides connections with the train schedule from Llandudno Junction. There is one bus stop on either side of Station Road, with services again connecting to Llandudno and Llandudno Junction.

Car Parking

13.10 Deganwy Station Road car park, along with its overspill, offers around 100 spaces. Prices range from £1.00 for one hour to £4.70 for 24 hours.

Levels of Crime

13.11 There were 149 crimes reported in Deganwy in the year to March 2022, indicating a crime rate of 37.9 crimes per 1,000 people. This is lower than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period and is the lowest rate of crime of the towns assessed in this study[9].

Deganwy as an Employment Centre

Quantum, Types and Quality of Existing Floorspace

Figure 13.2 Provision of office floorspace in Deganwy

Source: VOA / Lichfields

13.12 Due to its size and predominantly hospitality-based offer, there is only a single unit within Deganwy centre classified as in office use by the VOA. This unit is around 75 sqm and sits above an estate agent. The unit is currently occupied by an Architects Firm.

13.13 Other than this, there is an industrial equipment supplier housed in a two-storey building to the north of the commercial centre boundary. This c.950 sqm unit is not classified as office space by the VOA but some ancillary office use was apparent from outside. There is also around 400 sqm of office space located at Deganwy Marina approx. 400m from the centre which appears to

[9] https://www.ukcrimestats.com/Neighbourhood/5988

house residential agents and offices servicing the marina itself. No data on the quality of office in Deganwy is available but based on the other centres in Conwy a visit to the centre suggests that office in this location would be located in buildings of 2- or 3- star quality.

Representation of Businesses

13.14 As previously stated, there is extremely limited office use within Deganwy, with only an architect present within the main centre.

Stock Vacancy and Turnover

13.15 Based on a visit to the centre and a review of commercial property websites, there is zero office vacancy within Deganwy.

Rental Levels

13.16 CoStar does not hold any data on rental levels within Deganwy, nor are any examples available on commercial property websites. Estimated office rents in this location would be around the lower end of rents in Conwy centre, so around £100 per sqm.

Public Services

13.17 There are no public services in Deganwy. The former Post Office and Library were both closed some years ago.

Operator Requirements

13.18 Richard Baddeley & Co. is not aware of any operator requirements for Deganwy and there were no requirements identified from Lichfields' assessment of the Requirements List as of 26th May 2022.

Customer Views

13.19 No household survey results relating to customer views available for this small centre.

Business Views

13.20 Just one response was received from a business in Deganwy, with little detail provided. The only suggestion for improvement was the need for a local convenience store and post office within the centre.

SWOT Analysis

Strengths

- Deganwy has a dual role serving both local residents and tourist visitors to Deganwy Beach and Marina.
- The centre is well connected to the railway station.
- Deganwy Station car park provides accessible off-street car parking.
- For a centre of its size, there is a good provision of restaurants / cafés and hairdressers / beauty parlours.

Weaknesses

- Deganwy is the second smallest designated local centre in terms of the number of retail and service units.
- There is a limited selection of comparison and convenience shops.
- The Co-op store is relatively small and does not adequately cater for main and/or bulk food shopping.
- Traffic along the A546 has an adverse impact on the shopping environment.
- Shops and services in Deganwy are fragmented. The Co-op is poorly connected to the main concentration of facilities.
- The centre has limited development opportunities.

Opportunities

- Increased 'staycation' demand could increase the number of tourist visitors to the beach and marina.

Threats

- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers / operators.
- The longer-term impact of Covid-19, Brexit and now the cost of living crisis may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies.

Deganwy – Option Development

13.21 Deganwy is the smallest of the centres within this study and is a well performing and self-sustaining centre that caters to local residents as well as passing tourists. The selling point of the town are the scenic views it offers over the River Conwy estuary. The centre has a pleasant feel with a high number of cafes relative to its size.

13.22 Whilst the main row of shops itself is attractive, with Victorian parade style roofs, few vacancies and well-kept residential properties above, there are potential improvements to be made to the train station and car parks that sit between the A546 and the River Conwy.

Maintain train station, car parks and public realm

13.23 Whilst Deganwy benefits from stunning views over the River Conwy, from Station Road this view includes the train station and crossing bridge, as well as the station car parks. The station itself is basic, with a shelter on each platform and a notice board. The attractive original crossing bridge is the most prominent feature and should be regularly painted. Lighting along the platforms should be updated or better maintained, with some lamp posts missing lamps and all in need of fresh painting.

13.24 There are two car parks in front of the station which join in the middle. The northern car park is paved and features stone walls and planting around the perimeter in keeping with the rest of the centre. The southern part of the car park stretches for around 150m along station road and consists of uneven and unsurfaced land, parts of which are overgrown.

13.25 Overall, this part of the car park looks poorly maintained compared to the northern car park and the rest of the centre. Efforts should be made to bring it in line with the rest of the car park by introducing surfacing and maintained planting. In addition, there may be potential to bring the section of the car park directly in front of the crossing bridge into better use through new surfacing, planting and pedestrian links to create a station gateway area that better integrates the station with the centre and still allows cars to pass between the two car parks.

14.0 Kinmel Bay Local Centre

Introduction

14.1 Kinmel Bay is designated as a Local Centre in the Conwy Replacement Local Development Plan – Preferred Strategy. It was previously designated as a District Centre in the Adopted Conwy LDP. Based on the Replacement Local Development Plan it is a third-tier centre in the hierarchy of centres in the County Borough, below the Sub-Regional Shopping Centre at Llandudno and designated Town Centres.

Figure 14.1 Kinmel Bay promenade and beach

14.2 Kinmel Bay's main centre lies primarily around the intersection of Foryd Road and St Asaph Avenue. On the southern side of Foryd Road and either side of St Asaph Avenue there is a small row of retail units on a small side street called The Square. To the east of these shops is the Kinmel Bay Library and the Towyn and Kinmel Bay Town Council offices. On the north side of Foryd Road there is small car park and a pharmacy to the east and Caravan Dealership to the west. The centre is dominated however by an Asda superstore which lies on the west of St Asaph Avenue between the man intersection and the promenade, which is c.350m from the intersection. There are also two small clusters of retail / hospitality units approximately 500m either way from the intersection along Foryd Road. In this sense the centre is slightly disjointed and not as neatly definable as some other centres. Aside from north of the Asda, the centre immediately adjoins residential streets.

Kinmel Bay Place Plan

14.3 The community of Towyn and Kinmel Bay [TKB] is currently preparing a Place Plan for Kinmel Bay that will ultimately build a framework for planning and development. Initial work undertaken on behalf of the Town Council by Chris Jones Regeneration identified the following emerging themes:

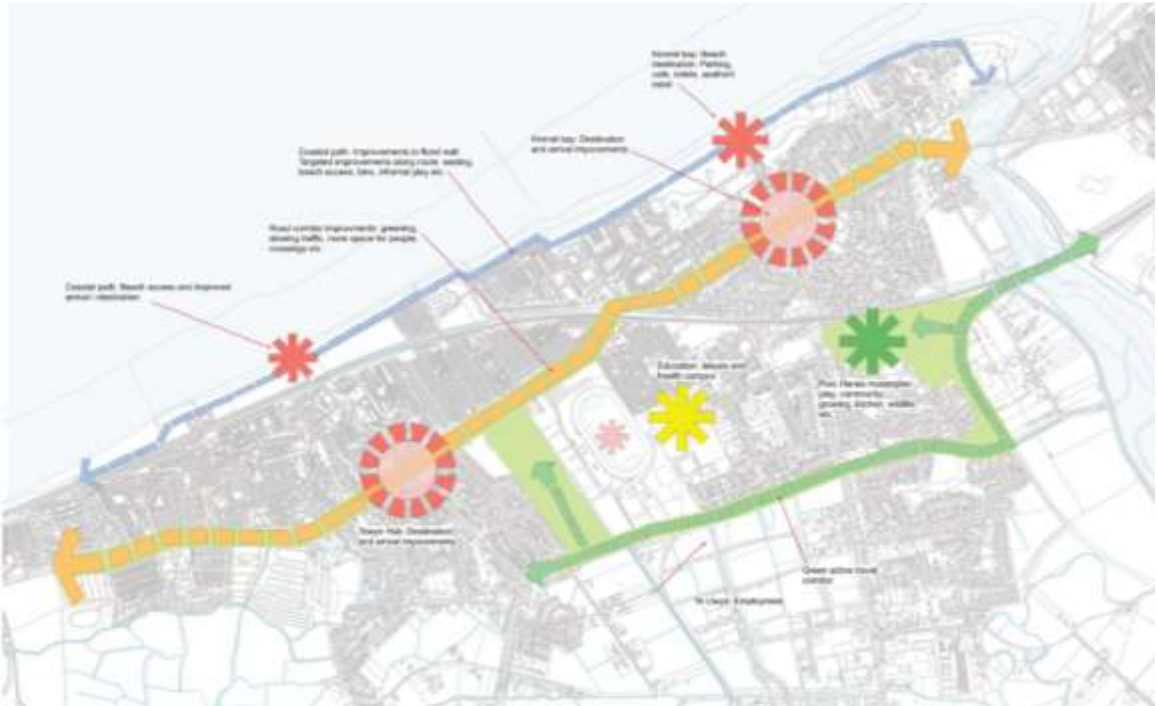
- **A Balanced TKB:** social, health, cultural, local services and educational infrastructure that is underpinned by environmental resilience and climate change agenda;
- **A Greener TKB**: green infrastructure and practice with people at the heart of it, that includes open spaces, parks, play streets, paths, trails and biodiversity corridors that complements the wider place agenda;
- **An Active TKB**: to develop a connected community that is mobile and active with recreation, sports and well-being accessible to all, with roads becoming more people-orientated;
- **An Enterprising TKB:** to enable local economic development that supports young people, entrepreneurs and established businesses to grow and to play a role in a sustainable economy; and,
- **TKB – A Destination for All:** to create a balanced place to live and visit with the need to improve the quality of the destination experience but through local solutions that meet community needs and appeal to visitors.

14.4 The emerging Vision is for Towyn and Kinmel Bay to be a cohesive place that can be explored from the sea to its streets to its green space with a string of communities that is active, enterprising and healthy.

14.5 This involves balancing the needs of residents whilst respecting the heritage of tourism and the economy; becoming a resilient place where coast meets land and where essential infrastructure is provided; a place of well-being for all that is accessible and inclusive; and community passion that is about getting things done.

14.6 The emerging Spatial Focus in the TKB Place Plan is illustrated below:

Figure 14.2 Spatial Focus



Source: Chris Jones 2022.

Kinmel Bay as a retail and service destination

14.7 Kinmel Bay has only 24 retail and service units and is a small designated local centre in terms of the number of units. The diversity of uses within the centre is set out in Table 14.1, set against the Goad Plan UK average and the average for all centres in Conwy County Borough.

Table 14.1- Mix of shops/service uses in Kinmel Bay

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	4	16.7	31.9	29.0
Convenience goods retail	2	8.3	8.7	9.7
Financial/professional services	0	0.0	7.7	9.0
Restaurants/cafés	2	8.3	10.7	10.0
Pubs/bars	3	12.5	4.6	4.9
Hot food takeaways	4	16.7	5.7	6.2
Other non-retail services	7	29.2	17.4	16.5
Vacant	2	8.3	13.4	14.7
Total	**24**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey March 2022 and Experian Goad Plan UK average 2021.

14.8 Kinmel Bay has a higher proportion of pubs/bars, hot food takeaways and other non-retail services. The provision of comparison good shops is much lower than the County Borough and UK averages. This mix of uses reflects the centre's dual role as the local shopping/service and tourist destination. There were just two vacant shop units within the centre at the time of Lichfields' survey (January 2022) and as a result the vacancy rate is just below the UK and County Borough averages.

14.9 The centre has a poor selection of comparison shops (just four outlets). Only two of the Goad comparison categories are represented. Table 14.2 provides a breakdown of comparison units by category. Boots Pharmacy, Co-op and Spar are the only national multiple retailers (excluding charity shops). Most outlets are small independent traders.

Table 14.2 - Mix of comparison goods shops – Kinmel Bay

Type	Number units	% units	UK average
Clothing and footwear	0	0.0	21.5
Furniture, carpets and textiles	0	0.0	7.7
Books, arts, cards and stationers	0	0.0	6.1
Electrical, music and photography	0	0.0	9.3
DIY, hardware and homeware	0	0.0	6.9
China, glass and gifts	0	0.0	5.5
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	2	50.0	12.0
Variety, department and catalogue	0	0.0	1.7
Florists, nurserymen and seedsmen	0	0.0	2.2
Toys, hobby, cycle and sports	0	0.0	5.5
Jewellers	0	0.0	5.1
Charity and second-hand shops	0	0.0	10.0
Other comparison goods retailers	2	50.0	5.2
Total	**4**	**100.0**	**100.0**

Source: Lichfields' land use survey March 2022 and Experian Goad Plan UK average 2021.

14.10 Kinmel Bay has a limited range of service uses (15 in total), which is the highest provision within the local centres in the County Borough. There is a reasonable choice of fast food takeaways and pubs/bars, as shown in Table 14.3.

Table 14.3- Mix of service uses – Kinmel Bay

Type	Number units	% units	UK average
Restaurants/cafés	2	16.7	24.0
Fast food/takeaways	4	33.3	14.9
Pubs/bars	3	25.0	11.8
Banks/other financial services	0	0.0	8.4
Betting shops/casinos/amusement	0	0.0	3.8
Estate agents/valuers	0	0.0	7.8
Travel agents	0	0.0	1.5
Hairdressers/beauty parlours	3	25.0	26.3
Launderettes/dry cleaners	0	0.0	1.7

Type	Number units	% units	UK average
Sub-total	**12**	**100.0**	**100.0**
Other	4		
Total	**16**		

Source: Lichfields' land use survey March 2022 and Experian Goad Plan UK average 2021.

Retail catchment area

14.11 The retail capacity analysis suggests Kinmel Bay attracts 37% of its trade from the local Zone 2 - East. Over 60% is estimated to comes from tourist visitors.

Shop rental levels

14.12 The VOA's latest Zone A retail rents indicate the highest prime pitch Zone A rents achieved in Kinmel Bay are £130 per sq.m, which is relatively low when compared with other smaller centres in the County Borough.

Public Transport Links

14.13 Kinmel Bay does not have its own train station, with the nearest being Rhyl station approx. 2.5km to the east. There is a bus stop on both sides of Foryd Road near the main intersection. Services run eastwards to Rhyl, southwards to Bodelwyddan and westwards to Pensarn and along the coast.

Car Parking

14.14 Kinmel Bay's main car park is on the promenade and has 54 spaces. Prices range from 60p for 1 hour to £4.20 for 24 hours. In addition, there is a free short-stay car park on Foryd Road with around 15 spaces and around 30 free spaces servicing the shops on The Square. There is also on-street car parking on the surrounding residential streets, as well as the large Asda car park which has around 450 spaces.

Levels of Crime

14.15 There were 829 crimes reported in Kinmel Bay in the year to March 2022, indicating a crime rate of 136 crimes per 1,000 people. This is higher than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period and is the 4th highest rate of crime of the towns assessed in this study[10].

Kinmel Bay as an employment centre

14.16 There are no real office uses within Kinmel Bay. The VOA lists a single 15 sqm space within the Community Resource Centre on The Square as the only office use within or near the main centre. The nearest office use is at Tir Llwyd Industrial Estate approx. 1.5 km south of the centre, where the VOA lists around 250 sqm of office space across five small units which are ancillary use within larger industrial units.

Public Services

14.17 In terms of public services, there is a community centre, clinic, and public library within a single facility on the south side of Foryd Road, and a medical centre on the north side.

[10] https://www.ukcrimestats.com/Neighbourhood/5838

Operator Requirements

14.18 Richard Baddeley & Co. is not aware of any operator requirements for retail or office use in the town. There were no requirements identified from Lichfields' assessment of the Requirements List as of 26th May 2022.

Customer Views

14.19 No household survey results relating to customer views available for this small centre.

Business Views

14.20 No responses to the business survey were received from companies located in Kinmel Bay.

SWOT Analysis

Strengths

- Kinmel Bay has a dual role serving both local residents and tourist visitors to Kinmel Bay Beach and caravan parks.
- The Asda superstore is a significant anchor for the centre, catering for main and bulk food shopping.
- The Asda store car park provides significant levels of off-street car parking.
- For a centre of its size, there is a good provision of pubs/bars and hot food takeaways.

Weaknesses

- Kinmel Bay is the smallest designated local centre in terms of the number of retail and service units.
- There is a very limited selection of comparison and convenience shops.
- Traffic along the A548 has an adverse impact on the shopping environment and restricts pedestrian movement between the beach and Asda and the main parade of shops/services.
- Shops and services in Kinmel Bay are fragmented.
- The centre has limited development opportunities.

Opportunities

- Increased 'staycation' demand could increase the number of tourist visitors to the centre and seafront, providing spin off benefits to shop and services in the town centre.
- Improved linkages to and from the beach could help attract more tourist visitors to the centre.

Threats

- The longer-term impact of Covid-19, Brexit and now the cost of living crisis may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies.

Kinmel Bay – Option Development

14.21 Kinmel Bay is the smallest centre within the study but has a relatively high scope for improvement. Like some other centres in this study, the centre is anchored around an intersection, as well as the Asda Superstore. Together, the A548, its intersection with St Asaph

Avenue and the Asda Superstore dominate the centre. There is very little in the way of pedestrian priority and no cycle infrastructure. The Asda also overshadows the connections with the attractive promenade and beach, which themselves are poor from the perspective of pedestrians. Overall, there is scope to make the centre more attractive, reduce the visual impact to the Asda, and create a better experience for those walking and cycling to/from the shops and the beach.

14.22 The draft TEP Green Infrastructure Conwy Project recommends that for Kinmel Bay Town Centre there should be a particular focus on the main through road to create better pedestrian environment. Recommendations are summarised in Figure 14.3, but include:

- **Foryd Road Connection:** Reduce carriageway width and increase width of walkways and consider scope to introduce dedicated cycle route. Introduce tree avenue, hedgerow, SUDs rain garden planting within existing amenity grass verges. Introduce median strip to visually narrow carriageway, with tree planting if feasible.
- **Foryd Road/St Asaph Avenue Junction:** Key nodal point with underutilised green space. Increase tree planting, shrub planting and rain garden planting within existing amenity grass.
- **Sandy Cove Connection (St Asaph Avenue North):** Create green link to waterfront, coast path and LNR. Tree planting and coastal shrubs within existing raised planters on either side of road, although may be outside land ownership. Introduce traffic calming and consider greater interventions to the boundary with ASDA supermarket to remove raised planters and create useable public realm and green walking and cycling link to the sand dunes and seafront.
- **Charlesville Road Park:** Introduce additional tree planting, hedgerows to boundaries, rain garden planting/SuDS and diversify amenity grassland with areas of meadow and bulb planting. Enhance pedestrian and cycle connection through the open space.

Figure 14.3 TEP Draft Green Infrastructure Masterplan for Kinmel Bay Town Centre

Source: TEP (2022): Transforming Towns Green Infrastructure Project – Conwy Opportunities

15.0 Llanfairfechan Local Centre

Introduction

15.1 Llanfairfechan is designated as a Local Centre in the Conwy Replacement Local Development Plan – Preferred Strategy. It was previously designated as a Town Centre in the Adopted LDP. Based on the Replacement Local Development Plan it is a third-tier centre in the hierarchy of centres in the County Borough, below the Sub-Regional Shopping Centre at Llandudno and designated Town Centres.

Figure 15.1 Station Road, Llanfairfechan

15.2 Llanfairfechan's main centre is based around the high street of Village Road / Station Road and is split into upper and lower parts by the intersection with Aber Road / Penmaenmawr Road.

15.3 The upper area has a relatively new Co-op food store, a small number of retail units, an infant school and a further small convenience store. The lower part contains a historic terrace of shops containing professional offices, a carpet store, antique shops, and hot food takeaway and adjoins the waterfront recreation areas.

15.4 There is a vacant Pub / Hotel, The Village Inn, on Penmaenmawr Road which is currently for sale for £525,000 (early 2022).

Figure 15.2 Llanfairfechan town centre

Source: Lichfields

Llanfairfechan as a retail and service destination

15.5 Llanfairfechan has 44 retail and service units. The diversity of uses within the centre is summarised in Table 15.1, compared with the Goad Plan UK average and the average for all centres in Conwy County Borough.

Table 15.1- Mix of shops/service uses in Llanfairfechan centre

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	11	25.0	31.9	29.0
Convenience goods retail	4	9.1	8.7	9.7
Financial/professional services	4	9.1	7.7	9.0
Restaurants/cafés	3	6.8	10.7	10.0
Pubs/bars	1	2.3	4.6	4.9
Hot food takeaways	2	4.5	5.7	6.2
Other non-retail services	9	20.5	17.4	16.5
Vacant	10	22.7	13.4	14.7
Total	**44**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

15.6 The centre has a much higher proportion of other non-retail services than the UK and Conwy averages, particularly hair and beauty salons. Retail outlets occupy only 34.1% of units in the centre compared with the County Borough average of 40.6%. The proportion of financial/professional services is also relatively high. This mix of uses reflects the centre's primary role as the local shopping and service destination. There were 10 vacant shop unit within the centre at the time of Lichfields' survey (January 2022) and the vacancy rate is much higher than the UK and County Borough averages.

15.7 The centre has a small selection of comparison shops (11 outlets). Only 4 of the 14 Goad comparison categories are represented. The centre has a particularly good provision of furniture/carpet and textile shops. Table 15.2 provides a breakdown of comparison units by category. Co-op and Nisa Local are the only national multiple retailers. All other outlets are small independent traders.

Table 15.2 - Mix of comparison goods shops – Llanfairfechan

Type	Number units	% units	UK average
Clothing and footwear	0	0.0	21.5
Furniture, carpets and textiles	5	45.5	7.7
Books, arts, cards and stationers	0	0.0	6.1
Electrical, music and photography	0	0.0	9.3
DIY, hardware and homeware	0	0.0	6.9
China, glass and gifts	1	9.1	5.5
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	0	0.0	12.0
Variety, department and catalogue	0	0.0	1.7
Florists, nurserymen and seedsmen	1	9.1	2.2
Toys, hobby, cycle and sports	0	0.0	5.5
Jewellers	0	0.0	5.1
Charity and second-hand shops	0	0.0	10.0
Other comparison goods retailers	4	36.4	5.2
Total	**11**	**100.0**	**100.0**

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

15.8 Llanfairfechan has a small range and choice of service uses (19 in total), which is the third lowest provision within the six local centres in the County Borough. The choice of outlets in each category is limited, with the exception of hair and beauty parlours, as shown in Table 16.3.

Table 15.3- Mix of service uses – Llanfairfechan

Type	Number units	% units	UK average
Restaurants/cafés	3	21.4	24.0
Fast food/takeaways	2	14.3	14.9
Pubs/bars	1	7.1	11.8
Banks/other financial services	1	7.1	8.4
Betting shops/casinos/amusement	0	0.0	3.8
Estate agents/valuers	1	7.1	7.8
Travel agents	0	0.0	1.5
Hairdressers/beauty parlours	6	42.9	26.3

Type	Number units	% units	UK average
Launderettes/dry cleaners	0	0.0	1.7
Sub-total	**14**	**100.0**	**100.0**
Other	5		
Total	**19**		

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

Retail catchment area

15.9 The retail capacity analysis suggests Llanfairfechan attracts 30% of its trade from the local Zone 4 - West. Most of the remaining trade is estimated to comes from tourist visitors.

Shop rental levels

15.10 The VOA's latest Zone A retail rents indicate the highest prime pitch Zone A rents achieved in Llanfairfechan are only £125 per sqm, which is relatively low when compared with other smaller centres in the County Borough.

Public Transport Linkages

15.11 Llanfairfechan's train station is on the North Wales Coast Line around an 800m walk to the north of the centre. The station is serviced by regular two-hourly trains to Chester via Colwyn Bay, with most trains then going on to Cardiff Central or Birmingham International. There are train services to Bangor, which is accessible for commuting and shops/services. There is also a limited Sunday service to/from Crewe.

15.12 There are bus stops along Village/Station Road and Aber/Penmaenmawr Road. Services run south west into Gwynedd towards Bangor, or north east towards Penmaenmawr and Conwy.

Car Parking

15.13 Llanfairfechan has a large car park on the promenade with around 120 spaces), a small car park at the station with 14 spaces (both approx. 600m from the centre), and a further car park within the main centre on Station Road with around 30 spaces. All car parking is free. There is also on street parking along Station Road and Village Road.

Levels of Crime

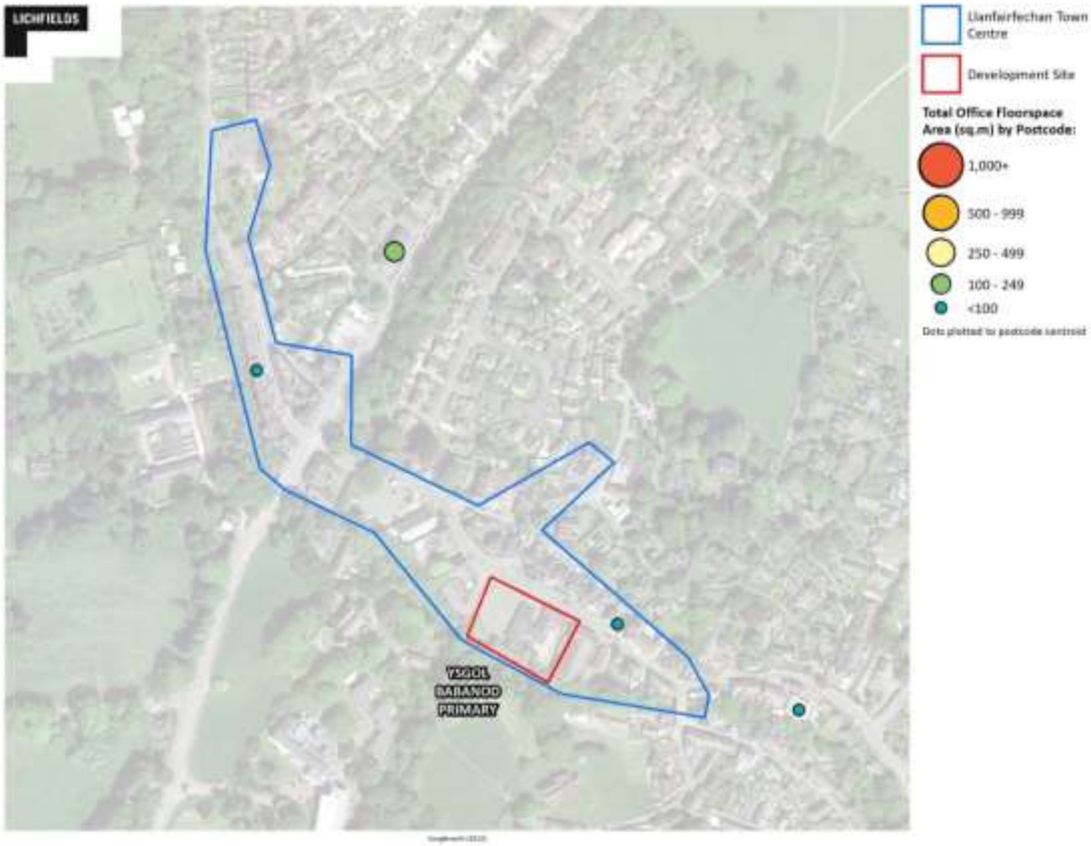
15.14 There were 264 crimes reported in Llanfairfechan in the year to March 2022, indicating a crime rate of 72.4 crimes per 1,000 people. This is lower than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period and is the second lowest rate of crime of the towns assessed in this study[11]. Only Deganwy had a lower crime rate of the towns in this study.

[11] https://www.ukcrimestats.com/Subdivisions/PRW/20754/

Llanfairfechan as an Employment Centre

Quantum, Types and Quality of Existing Floorspace

Figure 15.3 Provision of office floorspace in Llanfairfechan



Source: VOA / Lichfields

15.15 There is very little office space within Llanfairfechan Town Centre, with VOA data showing around 100 sqm of space across three units. These include an office space within the Community Centre, space above a retail unit and a small space within Alton Villa on Bryn Road just outside the centre. There is also around 170 sqm of office space within the Plas Menai health centre on Penmaenmawr Road approx. 250m from the centre. No data on the quality of offices in Llanfairfechan is available but based on the other centres in Conwy a visit to the centre suggests that offices in this location would be in buildings of 2- or 3- star quality.

Representation of Businesses

15.16 A visit to the centre and other information available does not suggest the presence of any purely office-based businesses within Llanfairfechan. The small unit on Bryn Road is attached to a Podiatry/Chiropody practice. The Community Centre space is likely in flexible use or servicing the centre itself. The use of the retail unit office space was not clear from a visit. The larger space on Penmaenmawr Road outside the centre is attached to a health centre and pharmacy.

Stock Vacancy and Turnover

15.17 Based on a visit to the centre and a review of commercial property websites, there is zero office vacancy within Llanfairfechan.

Rental Levels

15.18 CoStar does not hold any data on rental levels within Llanfairfechan, nor are any examples available on commercial property websites. Estimated office rents in this location would be around the same as other small centres in Conwy such as Llanrwst and Penmaenmawr, so around £85 per sqm.

Public Services

15.19 Ysgol Y Babanod Infant School sits within an old school building in the upper part of the town and is earmarked for relocation to an out-of-centre site, which would free up the current premises for potential office/commercial use.

Operator Requirements

15.20 Richard Baddeley & Co. is not aware of any operator requirements for retail or office use in the town. There were no requirements identified from Lichfields' assessment of the Requirements List as of 26th May 2022.

Customer Views

15.21 No household survey results relating to customer views available for this small centre.

Business Views

15.22 The business survey received only two responses from businesses based in Llanfairfechan.

- Highlighted strengths of the town included the natural beauty of the area and local experiences such as Zip World and Surf Snowdonia which help to extend the season beyond summer.
- Key weaknesses included the lack of variety in shops and the number of empty premises on the high street. Parking was also mentioned as an issue.
- It was indicated that many people park up in the town, visit one shop or pick up some food from a takeaway and then leave, rather than browse the high street or visit multiple shops due to the lack of things like butchers, grocers, and cafes with seating.
- A retail business stated that they wished to move to larger premises ideally in Llanfairfechan, but that choice within the town is limited, with larger premises requiring unviable levels of investment to become suitable.
- It was noted that there are several buildings which require renovation as they are unsightly and/or not in use.
- In terms of empty properties or those with potential, several were mentioned including the old Tasty Bake shop which receives lots of negative comments from locals; the empty funeral home and adjacent building on Station Road, an old shop in a dangerous state of disrepair opposite the Town Hall; and the former Co-Op unit which could be a prime high street property if renovated. A respondent stated there is rumours that the old Co-Op will be used as storage, which would be a huge missed opportunity for the high street.

SWOT Analysis

Strengths

- Llanfairfechan is the third largest designated local centre in terms of the number of retail and service units.

- The centre has a dual role serving both local residents and tourist visitors to Llanfairfechan Beach.
- For a centre of its size, there is a good provision of furniture shops and hairdressers/beauty parlours.

Weaknesses

- The Co-op and Nisa stores are relatively small and do not adequately cater for main and bulk food shopping.
- The centre is poorly connected to the seafront.
- The centre has limited off-street car parking.
- The structure of the centre is long and linear and the centre is dissected by the Aber Road/Penmaenmawr Road, which restricts pedestrian movement.
- The shop vacancy rate is much higher than the County Borough and UK averages, which suggests demand for premises is relatively low.
- The centre has limited development opportunities.

Opportunities

- Increased 'staycation' demand could increase the number of tourist visitors to the centre and seafront, providing spin off benefits to shop and services in the town centre.
- Improved signage to and from the seafront could help attract more tourist visitors to the centre.

Threats

- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators.
- The longer-term impact of Covid-19, Brexit and now the cost of living crisis may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies.

Llanfairfechan – Option Development

15.23 Llanfairfechan is a relatively self-sustaining town with a strong community feel which serves as a retail centre for the indigenous population as well as having a minor tourism presence during the high season. The centre suffers from a high share of vacant properties relative to its size, as well as several properties in poor states of repair along the high street.

15.24 The intersection of Aber/Penmaenmawr Road and Station Road stands in the centre of the high street and is the main point of entry into the town. There is potential to improve signposting of the town and high street for those travelling by car as well as improving the aesthetics of this intersection to feel more like a focal point and gateway to the centre.

15.25 Llanfairfechan's train station and seafront sit 400-500m away from the centre down Station Road. Linkages between the centre, the station and the seafront could be improved to encourage visitors to explore the area and increase the length of stay.

15.26 Finally, there is potential to improve the look and feel of the centre, particularly on the southern part of station road, to better take advantage of the traditional narrow shopping street and original shop frontages.

15.27 The objectives for Llanfairfechan include:

- Develop a strategy to fill vacant shops;
- Improve the main intersection;
- Improve linkages between the centre and station/seafront; and,
- Improve the look and feel of the centre.

Develop a strategy to fill vacant properties

15.28 Llanfairfechan has a high number of vacant properties for its size with over fifth of retail units empty in late 2021. Some of these units look to have been vacant for some time and include whole properties with prominent high street locations. The town benefits from a large number of homes in the surrounding suburbs and is one of the most desirable areas in the County Borough. This should be capitalised on by diversifying the range of shops on offer to encourage more residents to spend more time on the high street rather than simply visiting the new Co-Op. Secondly, an action plan should be formed to tackle the long-term and whole property vacants, working with owners to bring these properties back to the market and into productive use.

15.29 The Village Inn on Station Road is currently on the market and sits in a key location, being highly visible for those travelling by car. The Inn also has a large outdoor space that could be improved to form a pleasant beer garden – something which the town and many other towns of comparable size in Conwy currently lacks. The Inn and outdoor space could also be used for private functions and public events such as a small market or beer festival. The reopening of the Inn therefore represents a key opportunity to draw visitors into the town and establish a focal point for the community.

Improve the main intersection

15.30 The intersection of Aber/Penmaenmawr Road and Station Road currently does little to signpost the centre and serves as a visual barrier between the upper and lower parts of Station Road. Similarly, there is little to draw people up Station Road towards from the junction as the shape of the road and large trees block this upper part of the centre from view.

15.31 The old signpost on the corner of the junction is attractive but is dwarfed by the less attractive modern signpost next to it and is easy to miss. Similarly, there are mismatched benches on this corner of the junction as well as only small and poorly kept planters. On all corners of the junction are galvanised steel railings which detract from the traditional feel of the built environment. The junction itself also feels overly large, being three lanes wide running east/west.

15.32 Overall, there is potential to improve the junction to establish more of a gateway to the town, better signpost the high street and increase the continuity between the upper and lower parts of the centre. Options to improve signage and introduce more attractive street furniture, planting and barriers should be explored. Similarly, the potential to consolidate the junction into a mini roundabout and replace the crossings with zebra crossings, or even introduce traffic calming measures such as a paved junction to increase pedestrian priority should be considered.

Improve linkages between the centre and station/seafront

15.33 Currently, there is little signposting of the seafront from the centre and the two areas feel distinct. Better signposting from the centre would encourage longer stays for visitors and use of consistent street furniture and planting along Station Road would help bring the two areas together. Similarly, the attractiveness of the rail bridge could be improved with something like a mural, which again would help the continuity of the centre with the seafront.

Improve the look and feel of the centre

15.34 The upper part of Llanfairfechan centre has a light, open and almost village-like feel, whilst the lower part is a narrow shopping street running downhill with traditional shop fronts on either side. The town is already attractive, with both parts having a different feel, however small steps could be made to make the two parts feel like a whole and improve the streetscape particularly in lower Station Road.

15.35 Introducing more colour into the centre through more greenery and flowers would heighten the picturesque nature of the town. This could be achieved through new planters around the intersection and on the wider pavement sections in upper Station Road, or through window boxes on upper floors in the lower part of the town. The narrow nature of lower Station Road should be taken advantage of using bunting, strings of lights or other decoration running between buildings, even if only during the high season, turning lower Station Road into an ideal photo opportunity for visitors.

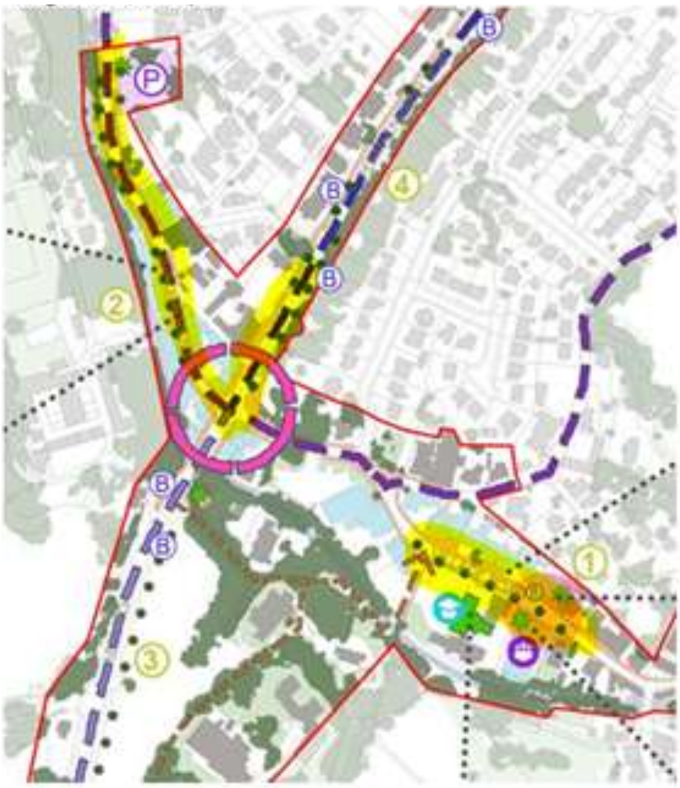
15.36 More major initiatives may be required in cleaning up and better maintaining some of the more tired buildings in the lower part of town, the public realm around the see front, and ensuring shop fronts are of a consistent quality. Efforts could also be made to soften some of the harsher, more modern buildings through careful consideration of shop frontage materials and some of the streetscape measures listed above such as window boxes.

15.37 General tidying up of pavements through cleaning and weeding is required in some locations. Rationalisation of parking alongside resurfacing or paving in areas such as outside the community centre would also allow for new street furniture and planting to create focal areas.

15.38 The draft TEP Green Infrastructure Conwy Project recommends that for Llanfairfechan Town Centre there should be a particular focus on the main shopping areas and the approach to the town. Recommendations are summarised in Figure 15.4, but include:

- **Village Road:** Opportunity to narrow carriageway and widen footpaths where possible to create build outs around parking areas and create space for tree and rain garden planting. Consider rationalising parking bays and repurpose hardstanding outside the community centre as GI with tree and shrub planting.
- **Station Road Public Realm:** Opportunity to create more pedestrian focused environment with wider footways, improved cycle connection and enhance crossing points/traffic calming. Potential to define build outs around parking areas, change surfacing to parking bays and create space for planting and footways.
- **Southern Approach Aber Road:** Opportunity for cycle provision, tree and hedge planting to east side of road within open space to reinforce entrance to town and connection to proposed school site. Opportunity for footpaths on both sides. Opportunity to enhance area around memorial and increase planting and seating.
- **Northern Approach Penmaenmawr Road:** Main approach to town centre and needs better definition and signage. Diversify existing grass verges with tree planting, bulb planting and display meadow to enhance and soften entrance to town. Option to create build outs around parking areas and use existing ones to create space for tree planting and SuDS rain garden planting. Opportunity to improve crossings / footpaths around bus stop.

Figure 15.4 TEP Draft Green Infrastructure Masterplan for Llanfairfechan Town Centre



Source: TEP (2022): Transforming Towns Green Infrastructure Project – Conwy Opportunities

16.0 Old Colwyn Local Centre

Introduction

16.1 Old Colwyn is designated as a Local Centre in the RLDP – Preferred Strategy. It was previously designated as a District Centre in the adopted Conwy LDP. Based on the RLDP it is a third-tier centre in the hierarchy of centres in the County Borough, below the Sub-Regional Shopping Centre at Llandudno and designated Town Centres.

Figure 16.1 Abergele Road, Old Colwyn

16.2 Old Colwyn is, as the name suggests, the oldest part of Colwyn Bay and contains some historic buildings within the centre of the village. Old Colwyn's centre lies along an 800m stretch of Abergele Road/A547 approx. 1.2km east of Colwyn Bay's centre. On the western side there are builders' merchants, an old hotel, fast food takeaways and some residential units. The main part of the centre has retail and hospitality units on either side as well as a Co-op petrol station. The eastern boundary of the centre is marked by a new Aldi supermarket and adjacent car wash.

Old Colwyn as a retail and service destination

16.3 Old Colwyn has 72 retail and service units. The diversity of uses within the centre is set out in Table 16.1, with the Goad Plan UK average and the average for all centres in Conwy County Borough provided for comparative purposes.

Table 16.1- Mix of shops/service uses in Old Colwyn

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	15	20.8	31.9	29.0
Convenience goods retail	12	16.7	8.7	9.7
Financial/professional services	2	2.8	7.7	9.0
Restaurants/cafés	2	2.8	10.7	10.0
Pubs/bars	6	8.3	4.6	4.9
Hot food takeaways	7	9.7	5.7	6.2
Other non-retail services	16	22.2	17.4	16.5
Vacant	12	16.7	13.4	14.7
Total	**72**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

16.4 The centre has a higher proportion of pubs/bars, takeaways and other non-retail services than the UK and Conwy averages. The proportion of convenience goods shops is also relatively high. There were 12 vacant shop units within the centre at the time of Lichfields' survey (January 2022) and the vacancy rate is above both the UK and County Borough averages.

16.5 Old Colwyn has a small selection of comparison shops (15 outlets). Only 7 of the 14 Goad comparison categories are represented and the choice of outlets in represented categories is limited (four or less outlets). The centre has a particularly good provision of furniture/carpet/ textile and DIY/hardware shops. Table 16.2 provides a breakdown of comparison units by category. Aldi, Co-op and Londis are the only national multiple retailers. Most outlets are small independent traders.

Table 16.2 – Mix of comparison goods shops – Old Colwyn

Type	Number units	% units	UK average
Clothing and footwear	0	0.0	21.5
Furniture, carpets and textiles	4	26.7	7.7
Books, arts, cards and stationers	0	0.0	6.1
Electrical, music and photography	0	0.0	9.3
DIY, hardware and homeware	3	20.0	6.9
China, glass and gifts	1	6.7	5.5
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	1	6.7	12.0
Variety, department and catalogue	0	0.0	1.7
Florists, nurserymen and seedsmen	0	0.0	2.2
Toys, hobby, cycle and sports	2	13.3	5.5
Jewellers	0	0.0	5.1
Charity and second-hand shops	2	13.3	10.0
Other comparison goods retailers	2	13.3	5.2
Total	**15**	**100.0**	**100.0**

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

16.6 Old Colwyn has a reasonable range of service uses (33 in total), which is the second highest provision within the six local centres in the County Borough. The centre has more service uses than the town centres at Llanrwst and Llandudno Junction. Despite the relatively high number of service uses for a centre of its size, the choice of outlets in each category is relatively limited, with the exception of hair/beauty parlours and takeaways, as shown in Table 16.3.

Table 16.3- Mix of service uses – Old Colwyn

Type	Number units	% units	UK average
Restaurants/cafés	2	7.4	24.0
Fast food/takeaways	7	25.9	14.9
Pubs/bars	6	22.2	11.8
Banks/other financial services	0	0.0	8.4
Betting shops/casinos/amusement	1	3.7	3.8
Estate agents/valuers	0	0.0	7.8
Travel agents	0	0.0	1.5
Hairdressers/beauty parlours	10	37.0	26.3

Type	Number units	% units	UK average
Launderettes/dry cleaners	1	3.7	1.7
Sub-total	**27**	**100.0**	**100.0**
Other	6		
Total	**33**		

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

Retail catchment area

16.7 The retail capacity analysis suggests Old Colwyn attracts about half of its trade from the local Zone 1 – Central. About a third of its trade is estimated to comes from tourist visitors.

Shop rental levels

16.8 The VOA's latest Zone A retail rents indicate the highest prime pitch Zone A rents achieved in Old Colwyn only £100 per sq.m, which is relatively low when compared with other smaller centres in the County Borough.

Public Transport Linkages

16.9 Old Colwyn does not have its own train station, with the closest being Colwyn Bay station which is approx. 1.8km from Old Colwyn. There are bus stops along Abergele Road, with services running eastwards to Abergele and Rhyl, and westwards towards Llandudno along the coast or inland towards Llandudno Junction.

Car Parking

16.10 The Victoria Road car park is within the centre and offers free parking with around 35 spaces. There is limited on-street parking along Abergele Road, although on street parking is available on surrounding residential streets.

Levels of Crime

16.11 There were 935 crimes reported in Old Colwyn in the year to March 2022, indicating a crime rate of 114.7 crimes per 1,000 people. This is very slightly lower than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period and is the 6th highest rate of crime of the towns assessed in this study[12].

[12] https://www.ukcrimestats.com/Subdivisions/PRW/22347/

Old Colwyn as an Employment Centre

Quantum, Types and Quality of Existing Floorspace

Figure 16.2 Provision of office floorspace in Old Colwyn

Source: VOA / Lichfields

16.12 There is very little office space within Old Colwyn centre. VOA data indicates a total of around 300 sqm of office use within the centre of Old Colwyn across four units, all of which are on the main high street of Abergele Road. Two of these are converted retail units, one is within a former residential dwelling, and one is a freestanding single-storey office building.

16.13 There is, however, around 5,600 sqm of office space at the North Wales Police Headquarters and 1,300 sqm of office space within Alexandra House, both of which sit just outside the western edge of the town centre Boundary. At the same site, the former Civic Offices, Glan-y-Don was vacated by the Local Authority approximately three years ago. The property is on the open market currently.

16.14 Alexandra House is rated as three-star quality by CoStar with the Police Headquarters likely to be of similar quality. Whilst no data is available on the smaller office uses, a visit to the centre indicated that these units would be of relatively poor 1- or 2-star quality, aside from the freestanding unit which looked to be of a higher quality.

Representation of Businesses

16.15 Linked to the Police HQ, the office space at Alexandra House is currently occupied by the North Wales Probation Service, whilst the town centre office in a former residential dwelling houses the North Wales Police Federation. The freestanding unit is occupied by a solicitor, whilst both converted retail units appeared vacant based on a visit to the centre.

Stock Vacancy and Turnover

16.16 Two of the converted retail units were vacant during a visit to the centre, which means around 80sqm of the 300 sqm present in the centre was vacant. The lack of space overall and the presence of two vacant units implies there is limited demand for office within the main centre, with the types and quality of units available a likely factor.

Rental Levels

16.17 CoStar estimates a rent per sqm of around £95 for Alexandra House, whilst the lower quality units in the main centre are likely to achieve a lower rent of around £85 per sqm.

Public Services

16.18 In terms of public services there is a GP surgery, two primary schools and a secondary school, Bryn Elian. Additionally, there is a community hospital providing a broad range of healthcare services.

Operator Requirements

16.19 Richard Baddeley & Co. is not aware of any operator requirements for retail or office use in the town. There were no requirements identified from Lichfields' assessment of the Requirements List as of 26th May 2022.

Customer Views

16.20 No household survey results relating to customer views available for this small centre.

Business Views

16.21 Two survey responses were received from businesses in Old Colwyn.

- Whilst it was noted that people are keen to get back to leisure activities following Covid-19, it was also suggested that people have less money to spend, and footfall is continuing to decline.
- It was said that there are many buildings in the town centre which require renovation and the town generally needs to be tidied up.
- Unfortunately, one respondent said that they were planning to close their retail business and move out of Conwy County due to the continued decline in footfall.

SWOT Analysis

Strengths

- Old Colwyn is the second largest designated local centre in terms of the number of retail and service units.
- The Aldi and Co-op stores are anchors for the centre, catering for main and bulk food shopping.
- The Aldi store provides off-street car parking.
- For a centre of its size, there is a good provision of convenience goods shops, pubs/bars, takeaways and hairdressers/beauty parlours.

Weaknesses

- The centre is poorly connected to the seafront.
- The structure of the centre is linear and the shops and services are fragmented, with a large presence of residential and empty units in the middle of the high street.
- Traffic along the A547 has an adverse impact on the shopping environment and restricts pedestrian movement.
- The shop vacancy rate is similar to the County Borough and UK averages.
- The centre has limited development opportunities.

Opportunities

- Increased 'staycation' demand could increase the number of tourist visitors to the centre and seafront, providing spin off benefits to shop and services in the town centre.
- Improved signage to and from the seafront could help attract more tourist visitors to the centre.

Threats

- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators.
- The longer-term impact of Covid-19, Brexit and now the cost of living crisis may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies.

Old Colwyn – Option Development

16.22 Like Llandudno Junction, Old Colwyn is a long and linear centre which is now anchored by the new Aldi to the eastern side and the Co-op filling station at the western side. As such the centre feels pulled in two directions, with a high number of vacant retail units as well as residential properties in clustered in the middle.

16.23 The centre has a high amount of long-term vacant retail units in need of refurbishment, including several small units which are unlikely to be fit for modern retail use.

16.24 The centre is heavily trafficked at certain times and features a wider carriageway in places whilst pavements can by narrow and poorly surfaced. The centre is lacking on-street parking along Abergele Road whilst the Victoria Road car park lacks adequate signposting and could benefit from improvement.

Consider encouraging increased flexibility of uses

16.25 The centre has a cluster of vacant properties as well as residential units in the middle, with retail being more focused towards either end of the centre. It may be worth considering consolidation of retail uses away from the middle by encouraging greater flexibility of use in this part of the centre. This consolidation may help to reduce the overall number of vacant properties whilst allowing for increased residential presence on the high street which can help increase footfall.

Improve the Victoria Street car park.

16.26 The car park on Victoria Street should serve as the centres main parking location for shoppers, however it is easily missed whilst driving due to a lack of signposting. Similarly, the car park needs investment, as it can appear like a group of cars parked on private land rather than the centres main free public car park. The effect of this is that visitors may choose to find parking down residential streets whilst there is space available on Victoria Street, in turn this can encourage inappropriate use of the car park with workers and residents parking there for long periods.

16.27 **Improve the look and feel of the centre**

16.28 Aside from vacant properties, many buildings along Abergele Road are in poor states of repair, particularly on the upper floors, whilst many of the vacant properties look to have been empty for a long time without being prepared for the market.

16.29 There is a small area with a rain shelter next to a pedestrian crossing that has been heavily planted and includes blooming flower boxes that add colour to the street. Efforts should be made to find other areas along Abergele Road where similar planting and flower boxes can be introduced to increase the coherence of the centre. The centre also features little in the form of a gateway into the town, which could be mitigated through better signposting and by consistent planting throughout.

16.30 The centre also features a wide road with narrow and sometimes poorly surfaced pavements, worsened by inefficient use of street furniture which should be addressed. Consideration should be given to narrowing of the carriageway and resurfacing of pavements, as well as introducing traffic calming measures such as zebra crossings rather than crossings with lights.

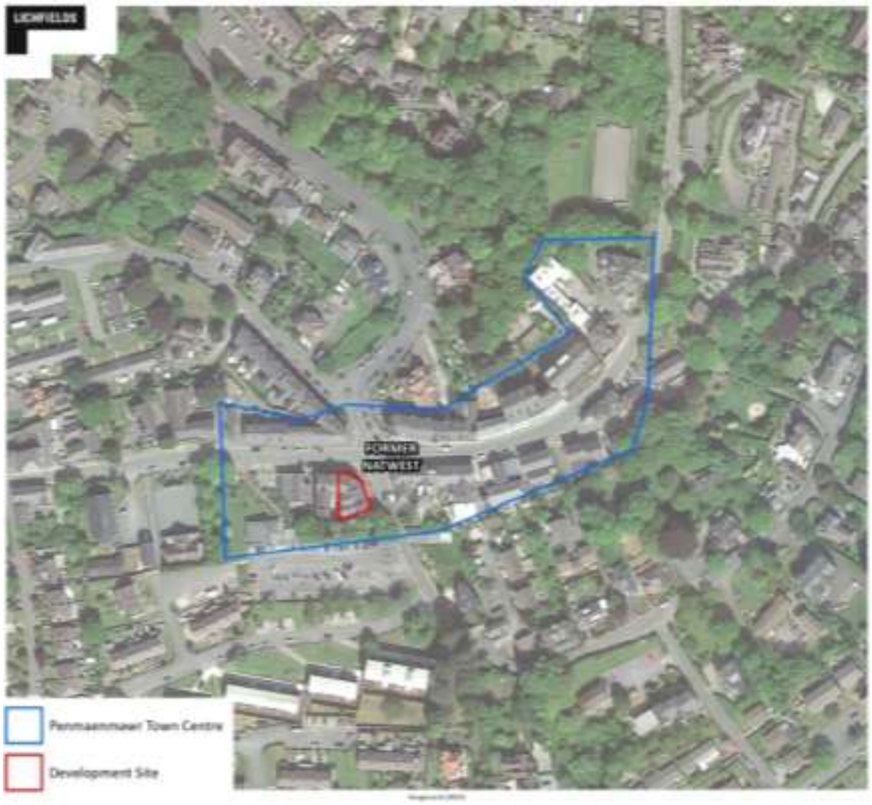
17.0 Penmaenmawr Local Centre

Introduction

17.1 Penmaenmawr is designated as a Local Centre in the RLDP – Preferred Strategy. It was previously designated as a District Centre in the adopted LDP. Based on the RLDP it is a third-tier centre in the hierarchy of centres in the County Borough, below the Sub-Regional Shopping Centre at Llandudno and designated Town Centres.

Figure 17.1 Bangor Road, Penmaenmawr

17.2 Penmaenmawr is one of the smaller centres within this study. It is based around the main street of Bangor Road / Pant-Yr-Afon and its intersection with Bynmor Terrace / Fernbrook Road. There are also some retail and office uses as well as a new Co-op outside the centre boundary westwards along Bangor Road.



Public Transport links

17.3 Penmaenmawr has its own train station approx. 300m from the centre which lies on the North Wales Coast Line. Services include a two-hourly train on weekdays and Saturdays running east along the coast towards Chester and west towards Holyhead. Chester provides links onwards to Birmingham International or Cardiff Central. There are additional trains at peak times to Crewe, and infrequent Sunday services to Crewe, Manchester Piccadilly, Cardiff Central and Wolverhampton.

17.4 There are bus stops just outside the centre on Bangor Road. Services run east towards Conwy or West towards Bangor via Llanfairfechan.

Car Parking

17.5 The centre's main car park lies on Fernbrook Road and has 82 spaces. Prices range from 60p for one hour to £4.20 for four hours. There is also on-street parking on many of the surrounding roads.

Levels of Crime

17.6 There were 379 crimes reported in Penmaenmawr in the year to March 2022, indicating a crime rate of 86.9 crimes per 1,000 people. This is lower than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period and is the 10th highest rate of crime of the towns assessed in this study[13].

[13] https://www.ukcrimestats.com/Subdivisions/PRW/20748/

Penmaenmawr as a retail and service destination

17.7 Penmaenmawr has 36 retail and service units. The diversity of uses within the centre is set out in Table 17.1, compared with the Goad Plan UK average and the average for all centres in Conwy County Borough.

Table 17.1- Mix of shops/service uses in Penmaenmawr

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	14	38.9	31.9	29.0
Convenience goods retail	2	5.6	8.7	9.7
Financial/professional services	2	5.6	7.7	9.0
Restaurants/cafés	5	13.9	10.7	10.0
Pubs/bars	0	0.0	4.6	4.9
Hot food takeaways	4	11.1	5.7	6.2
Other non-retail services	5	13.9	17.4	16.5
Vacant	4	11.1	13.4	14.7
Total	**36**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

17.8 Unusual for a lower tier centre, Penmaenmawr has a higher proportion of comparison goods retail uses than the UK and Conwy averages. The provision of restaurants/cafés and hot food takeaways is also above average. This mix of uses reflects the centre's dual role as the local shopping/service and tourist destination. There were four vacant shop units within the centre at the time of Lichfields' survey (January 2022) and the vacancy rate is just below the UK and County Borough averages.

17.9 Despite the relatively high proportion of comparison shops the range and choice of shops is limited (14 outlets). Only 7 of the 14 Goad comparison categories are represented and the choice of outlets in represented categories is limited (four or less outlets). The centre has a particularly good provision of furniture/carpet/textile and gift shops. Table 18.2 provides a breakdown of comparison units by category. Co-op and Spar are the only national multiple retailers, excluding charity shops. Most outlets are small independent traders.

Table 17.2 – Mix of comparison goods shops – Penmaenmawr

Type	Number units	% units	UK average
Clothing and footwear	1	7.1	21.5
Furniture, carpets and textiles	3	21.4	7.7
Books, arts, cards and stationers	1	7.1	6.1
Electrical, music and photography	0	0.0	9.3
DIY, hardware and homeware	0	0.0	6.9
China, glass and gifts	3	21.4	5.5
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	1	7.1	12.0
Variety, department and catalogue	0	0.0	1.7
Florists, nurserymen and seedsmen	0	0.0	2.2
Toys, hobby, cycle and sports	0	0.0	5.5

Type	Number units	% units	UK average
Jewellers	0	0.0	5.1
Charity and second-hand shops	2	14.3	10.0
Other comparison goods retailers	3	21.4	5.2
Total	**14**	**100.0**	**100.0**

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

17.10 Penmaenmawr has a small range and choice of service uses (14 in total), which is the second lowest provision within the six local centres in the County Borough. The choice of outlets in each category is limited, as shown in Table 18.3.

Table 17.3- Mix of service uses – in Penmaenmawr

Type	Number units	% units	UK average
Restaurants/cafés	5	35.7	24.0
Fast food/takeaways	4	28.6	14.9
Pubs/bars	0	0.0	11.8
Banks/other financial services	0	0.0	8.4
Betting shops/casinos/amusement	0	0.0	3.8
Estate agents/valuers	1	7.1	7.8
Travel agents	0	0.0	1.5
Hairdressers/beauty parlours	4	28.6	26.3
Launderettes/dry cleaners	0	0.0	1.7
Sub-total	**14**	**100.0**	**100.0**
Other	2		
Total	**16**		

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

Retail catchment area

17.11 The retail capacity analysis suggests Penmaenmawr attracts 43% of its trade from the local Zone 4 – West. Over half is estimated to comes from tourist visitors.

Shop rental levels

17.12 The VOA's latest Zone A retail rents indicate the highest prime pitch Zone A rents achieved in Penmaenmawr are £150 per sq.m, which is relatively high when compared with other smaller centres in the County Borough.

Penmaenmawr as an Employment Centre

Quantum, Types and Quality of Existing Floorspace

Figure 17.2 Provision of office floorspace in Llandudno

Source: VOA / Lichfields

17.13 There is almost no office use within the main centre of Penmaenmawr. The VOA shows just 50 sqm of office within the centre including a 20 sqm space in the Community Centre and a 30 sqm space in the Central Buildings on Pant-Yr-Afon. Further to this there is a vacant former bank within the centre and vacant spaces above retail units that could be converted to office use.

17.14 There are however some office uses just outside the centre. These include a number of units totalling around 200 sqm in the converted New York Cottages on Bangor Road; around 765 sqm at Plas Celyn on Bangor Road, a converted residential unit opposite the Co-op offering around 175 sqm and around 230 sqm in a converted dwelling on Brynmor Terrace. CoStar also indicates space at the Old School and former Council Depot on Bangor Road. Compared against the quality of office units in other centres, it is assessed that all units in Penmaenmawr are of 2- or 3-star quality.

Representation of Businesses

17.15 The only office use within the main centre consists of a small space in the Community Centre and a small space above a retail unit, although from a visit to the centre this was not obvious and it is unclear if the space is currently in use. Outside the centre boundary, the New York Cottages are currently occupied by a training provider and a and carpentry firm (non-office use), whilst units 1 and 4 are currently listed as available on rightmove.co.uk. The unit opposite the Co-op is occupied by the North Wales Regional Equality Network. The other out-of-centre office properties had no obvious occupiers.

Stock Vacancy and Turnover

17.16 Two units within New York Cottages are listed as available, with many of the out of centre office properties listed by the VOA apparently vacant. Within the centre there is also the vacant former bank and many spaces above retail units that could be put to office use. This suggests there is a high level of vacancy for office use in Penmaenmawr and there is no need for additional floorspace.

Rental Levels

17.17 The units in the New York Cottages listed as available on right move are listed for £6.84 per sq ft (£73.63 per sqm) and £5.81 per sq ft (£62.54 per sqm).

Operator Requirements

17.18 Richard Baddeley & Co. is not aware of any operator requirements for retail or office use in the town. There were no requirements identified from Lichfields' assessment of the Requirements List as of 26th May 2022.

Customer Views

17.19 No household survey results relating to customer views available for this small centre.

Business Views

17.20 A hospitality business was the only respondent to the business survey from Penmaenmawr.

- It was mentioned that people's desire to go abroad following the Covid-19 pandemic as well as rising costs in the UK is hurting tourism in the area.
- The town was said to benefit from a varied retail offer and a friendly village and community feel.
- Weaknesses included the lack of consistent opening hours and the lack of a real business community in the town.
- Offering free parking on the library car park and filling empty shops with local craft traders were suggested as possible interventions to improve the town.

SWOT Analysis

Strengths

- Penmaenmawr has a dual role serving both local residents and tourist visitors to Penmaenmawr Beach, although connections between the centre could be improved.
- For a centre of its size, there is a good provision of furniture shops, restaurants/cafés and takeaways.
- The Fernbrook Road car park provides off-street car parking.

Weaknesses

- Penmaenmawr is the third smallest designated local centre in terms of the number of retail and service units.

- The Co-op and Spar stores are relatively small and do not adequately cater for main and bulk food shopping.
- The centre is poorly connected to the seafront.
- Traffic along the Bangor Road has an adverse impact on the shopping environment and restricts pedestrian movement.
- The centre has limited development opportunities.

Opportunities

- Increased 'staycation' demand could increase the number of tourist visitors to the centre and seafront, providing spin off benefits to shop and services in the town centre.
- Improved linkages to and from the railway station and promenade could help attract more tourist visitors to the centre.

Threats

- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators.
- The longer-term impact of Covid-19, Brexit and now the cost of living crisis may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies.

Penmaenmawr – Option Development

17.21 Penmaenmawr is a small centre which for its size has a high share of gift/craft shops, and restaurants, cafes and takeaways. The centre is relatively self-sustaining and has few vacant units, although one of these is the prominent former Natwest Bank that closed in 2015.

17.22 The centre already has a pleasant feel with Victorian covered parades painted to match the roadside railings, attractive signage and lighting, well-kept buildings, and use of colour through bunting, planters and hanging baskets throughout.

17.23 Not much needs to change in Penmaenmawr. Filling and refurbishing the vacant Natwest Bank with an appropriate use such as a café or restaurant would add to the completeness of the centre. There is potential to narrow the carriageway or introduce traffic calming to allow for more space for pedestrians. Temporary street furniture could also be used to segment outdoor eating/drinking space. For example, the new Johnny Dough's restaurant could be allowed to utilise planters or dividers to allow for more outdoor tables on the pavement. Shops may also want to put displays outside to attract passers-by.

17.24 Signposting and waymarking of the pedestrian route to the station and through to the promenade could be improved from the centre, although the sea views make this less of an issue than in other centres.

17.25 Other than this, ongoing maintenance of the buildings, street furniture and planting should be ensured to protect the attractiveness of the centre.

TEP Green Infrastructure Project

17.26 The draft TEP Green Infrastructure Conwy Project recommends that for Penmaenmawr Town Centre there should be a particular focus on enhancing the town centre public realm and provide better connections to the railway and seafront. Recommendations are summarised in Figure 17.3, but include:

- **Bangor Road Approach:** Opportunity in places to narrow carriageway and introduce space for tree planting and SuDS rain garden planting along the main approach to the town centre from the west. Rationalise on-street parking and remove bus laybys and enhance and coordinate street furniture including planters, bollards and benches to reduce street clutter.
- **Pant-Yr-Afon Public Realm:** At main junction with Fernbrook Rd and Brynmor Terrace consider creating more pedestrian focused environment through reducing kerb radii, enhancing crossing points, possible build outs and raised table to define the entrance to the town centre Shopping Zone. At Town Centre Shopping Zone create pedestrian focused environment to calm traffic through reduction in carriageway width, enhanced crossings, define parking bays through build outs and surfacing change.
- **Fernbrook Road Car Park and Library:** Planting opportunities in car park and opportunities to enhance street furniture including planters and cycle parking.
- **Paradise Road Connection:** Opportunity to improve connection to railway station and seafront through enhanced street tree planting and SuDS rain garden planting. Opportunity to formalise parking along Paradise Road. Opportunity for better cycle provision.
- **Penmaenmawr Station:** Enhance railway station frontage with planting and public realm improvements. Opportunity to improve pedestrian connection between Paradise Road and the seafront with enhanced walkway. Opportunity for better cycle provision.

Figure 17.3 TEP Draft Green Infrastructure Masterplan for Penmaenmawr Town Centre

Source: TEP (2022): Transforming Towns Green Infrastructure Project – Conwy Opportunities

18.0 Rhos-on-Sea Local Centre

Introduction

18.1 Rhos-on-Sea centre is designated as a Local Centre in the Conwy RLDP – Preferred Strategy. It was previously designated as a District Centre in the adopted LDP. Based on the RLDP it is a third-tier centre in the hierarchy of centres in the County Borough, below the Sub-Regional Shopping Centre at Llandudno and designated Town Centres.

Figure 18.1 Penrhyn Avenue, Rhos-on-Sea

18.2 Rhos-on-Sea is one of the most vibrant areas of Colwyn Bay and contains a broad range of food and beverage outlets and of retail shops. Rhos-on-Sea's main centre is based around its promenade and several streets including Penrhyn Avenue, Colwyn Avenue, Rhos Road(B5116) and Everard Road. Penrhyn Avenue serves as the main high street leading to the promenade, with Rhos Road and Colwyn Avenue also featuring retail and hospitality units. There is a new Co-op supermarket at the north western edge of the centre boundary on Penrhyn Avenue.

18.3 The area also has high demand for residential property given its location close to the waterfront and the buoyant local commercial centre.

Rhos-on-Sea as a retail and service destination

18.4 Rhos-on-Sea has 92 retail and service units and is the largest designated local centre in terms of the number of units. The diversity of uses within the centre is set out in Table 18.1, compared with the Goad Plan UK average and the average for all centres in Conwy County Borough.

Table 18.1: Mix of shops/service uses in Rhos-on-Sea

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	33	35.9	31.9	29.0
Convenience goods retail	6	6.5	8.7	9.7
Financial/professional services	9	9.8	7.7	9.0
Restaurants/cafés	12	13.0	10.7	10.0
Pubs/bars	5	5.4	4.6	4.9
Hot food takeaways	7	7.6	5.7	6.2
Other non-retail services	15	16.3	17.4	16.5
Vacant	5	5.4	13.4	14.7
Total	**92**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

18.5 Unusual for a lower tier centre, Rhos-on-Sea has a higher proportion of comparison goods retail uses than the UK and Conwy averages. The provision of restaurants/cafés and hot food takeaways is also above average. This mix of uses reflects the centre's dual role as the local shopping/service and tourist destination. There were five vacant shop units within the centre at the time of Lichfields' survey (January 2022) and the vacancy rate is significantly below the UK and County Borough averages.

18.6 The centre has a reasonable selection of comparison shops (33 outlets) for a centre of its size. Most of the Goad comparison categories are represented but the choice of outlets in represented categories is limited (four or less outlets). The centre has a particularly good provision of clothing/footwear and gift shops. Table 18.2 provides a breakdown of comparison units by category. Boots Pharmacy, Co-op and Spar are the only national multiple retailers (excluding charity shops). Most outlets are small independent traders.

Table 18.2 - Mix of comparison goods shops – Rhos-on-Sea

Type	Number units	% units	UK average
Clothing and footwear	7	21.2	21.5
Furniture, carpets and textiles	4	12.1	7.7
Books, arts, cards and stationers	0	0.0	6.1
Electrical, music and photography	1	3.0	9.3
DIY, hardware and homeware	1	3.0	6.9
China, glass and gifts	5	15.2	5.5
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	2	6.1	12.0
Variety, department and catalogue	0	0.0	1.7
Florists, nurserymen and seedsmen	1	3.0	2.2
Toys, hobby, cycle and sports	2	6.1	5.5
Jewellers	3	9.1	5.1
Charity and second-hand shops	3	9.1	10.0
Other comparison goods retailers	4	12.1	5.2
Total	**33**	**100.0**	**100.0**

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

18.7 Rhos-on-Sea has a reasonable range of service uses (48 in total), which is the highest provision within the local centres in the County Borough. The centre has more service uses than the town centres at Conwy, Llanrwst and Llandudno Junction. Despite the relatively large number of service uses for a centre of its size, the choice of outlets in some categories is limited, as shown in Table 19.3. There is a good choice of restaurants/cafés, takeaways, pubs/bars and hairdressers. Richard Baddeley & Co. considers that there is continual demand for commercial space in the centre.

Table 18.3- Mix of service uses – Rhos-on-Sea

Type	Number units	% units	UK average
Restaurants/cafés	12	30.0	24.0
Fast food/takeaways	7	17.5	14.9
Pubs/bars	5	12.5	11.8
Banks/other financial services	1	2.5	8.4
Betting shops/casinos/amusement	1	2.5	3.8
Estate agents/valuers	4	10.0	7.8
Travel agents	1	2.5	1.5
Hairdressers/beauty parlours	8	20.0	26.3

Type	Number units	% units	UK average
Launderettes/dry cleaners	1	2.5	1.7
Sub-total	**40**	**100.0**	**100.0**
Other	8		
Total	**48**		

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

Retail catchment area

18.8 The retail capacity analysis suggests Rhos-on-Sea attracts 25% of its trade from the local Zone 1 - Central. Over 54% is estimated to comes from tourist visitors.

Shop rental levels

18.9 The VOA's latest Zone A retail rents indicate the highest prime pitch Zone A rents achieved in Rhos-on-Sea are £225 per sq.m, which is the highest amongst the smaller centres in the County Borough.

Public Transport links

18.10 Rhos-on-Sea does not have a dedicated train station, with the nearest being Colwyn Bay station approx. 1.8km south east of the centre. There are numerous bus stops along the promenade, Penrhyn Avenue, Rhos road and Colwyn Avenue. Services run eastwards along the coast to Colwyn Bay, westwards along the coast towards Penrhyn Bay and Llandudno, and southwards through Mochdre to Llandudno Junction and Conwy.

Car Parking

18.11 The main car park for the centre is located just outside the boundary on Colwyn Avenue and has 64 spaces. Prices range from 60p for 1 hour to £4.20 for 24 hours. There is also on-street parking along the promenade, all streets within the centre and all the surrounding residential roads.

Levels of Crime

18.12 There were 969 crimes reported in Rhos-on-Sea in the year to March 2022, indicating a crime rate of 127.8 crimes per 1,000 people. This is higher than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period and is the 5th highest rate of crime of the towns assessed in this study[14].

[14] https://www.ukcrimestats.com/Subdivisions/PRW/22356/

Rhos-on-Sea as an Employment Centre

Quantum, Types and Quality of Existing Floorspace

Figure 18.2 Provision of office floorspace in Rhos on Sea

Source: VOA / Lichfields

18.13 There is very little office floorspace within Rhos-on-Sea. The VOA indicates just two units totalling around 100 sqm within the centre. Only one other small unit above a café was identified during our visit. All spaces within the centre are above retail units and are likely to be two- or three-star quality.

Representation of Businesses

18.14 Based on a visit to the centre, the only office uses apparent were occupied a business services firm and a construction contractors office.

Stock Vacancy and Turnover

18.15 A visit to the centre and a review of commercial property websites the only vacant unit suitable for office use is an ex-NatWest Bank on the corner of Rhos Road and Colwyn Avenue. However, this unit is currently listed as an investment opportunity packaged with three adjacent lock up shop units with permission for A3 use which may limit interest.

18.16 Richard Baddeley & Co. considers that there is no vacant office space within the town and any availability would be taken up reasonably quickly by occupiers.

Rental Levels

18.17 No data on office rental levels within Rhos-on-Sea is available; however it is expected that rents would be within the lower range of those in other town centres, therefore in the region of £85 - £100 per sqm.

Operator Requirements

18.18 Richard Baddeley & Co. is not aware of any operator requirements for retail or office use in the town. There were no requirements identified from Lichfields' assessment of the Requirements List as of 26th May 2022.

Customer Views

18.19 No household survey results relating to customer views available for this small centre.

Business Views

18.20 The business survey received four responses from businesses based in Rhos on Sea.

- Respondents noted the lack of footfall following the pandemic, leading to many businesses not operating regular hours.
- It was suggested that the centre could be made more attractive through more regular cleaning and planting of flowers/greenery.
- One respondent noted that Rhos-on-Sea does not take advantage of seasonal events like Christmas as well as other nearby towns and could benefit from higher spending on seasonal events.
- Better signage of the centre from the promenade could attract more people walking the seafront into the town.
- The connectivity and signage of the promenade through to Rhos-on-Seavillage could be improved to tie the two together and give tourists further to explore.
- Improvements to parking and encouragement of artisan traders in empty units and street markets were all suggested as potential interventions to unlock the town's potential.

SWOT Analysis

Strengths

- Rhos-on-Sea is the largest designated local centre in terms of the number of retail and service units.
- The centre has a dual role serving both local residents and tourist visitors to Rhos Promenade and beach.
- The centre is compact and is well connected to the sea front. The seafront is within short walking distance.
- For a centre of its size, there is a good provision of clothing, furniture and gift shops.
- There is a good selection of restaurants/cafés, pubs/bars and takeaways. hairdressers/beauty parlours.
- The shop vacancy rate is significantly below the Country and UK averages, suggesting the demand for premises is relatively strong.

Weaknesses

- The Co-op store is relatively small and does not adequately cater for main and bulk food shopping.
- The provision of off-street car parking is limited.
- The centre has a limited number of national multiples.
- The centre has limited development opportunities.

Opportunities

- Increased 'staycation' demand could increase the number of tourist visitors to the centre and seafront, providing spin off benefits to shop and services in the area.

Threats

- The polarisation of investment toward larger centres could reduce demand for premises. The centre proximity to Llandudno town centre in particular could reduce demand.
- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators.
- The longer-term impact of Covid-19, Brexit and now the cost of living crisis may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies.

Rhos-on-Sea – Option Development

18.21 Rhos-on-Sea is a successful and self-sustaining seaside destination, as evident by the low number of retail vacancies and high number of retail units for the size of the centre. The town benefits greatly from its layout which naturally draws visitors towards the attractive promenade.

18.22 Issues facing the town are relatively minor. There may be scope to rethink car parking in some areas, as most streets within the centre are lined with cars at busy times, which can detract from the feel of the town. Linked to this, the town has poor provision of outdoor eating and drinking space.

18.23 A pilot scheme for rethinking parking might include the removal of parking from one side of Colwyn Avenue and widening of the pavement to allow outdoor tables for eating and drinking. Alternatively, traders could be allowed to utilise car parking spaces for tables, separated by temporary street furniture and planters.

18.24 However, there is a balance to be struck as reducing parking space in the centre can push cars onto residential streets, something which is already an issue in Rhos-on-Sea. To help combat this, signage for the Colwyn Avenue car park could be improved and fares given consideration, as often there are spaces available on the car park whilst residential streets remain lined with cars.

18.25 A £14m coastal defence and promenade improvements scheme is currently underway in the town, which will see around 1 million tonnes of sand added to the existing sea wall as well as widening and modernising of the promenade. In addition, there are plans for the introduction of a partial one-way system along the west promenade, although these plans have been met with controversy and are currently out for public consultation.

19.0 Craig y Don Local Centre

Introduction

19.1 Craig y Don was previously designated one of five District Centres in the adopted LDP. The centre is designated as a local centre in the RLDP – Preferred Strategy. It was previously a third-tier centre in the hierarchy of centres in the County Borough, below the Sub-Regional Shopping Centre at Llandudno and designated Town Centres.

Figure 19.1 Intersection of Mostyn Avenue and Queen's Road, Craig-Y-Don

19.2 Craig-Y-Don centre is based around the intersection of Mostyn Avenue and Queen’s Road which is around 200m from Llandudno’s seafront and promenade. The centre is small, extending only around 150m in each direction from the intersection and is mostly surrounded by residential dwellings. The small number of retail units are clustered predominantly along Mostyn Avenue around the intersection and on Queen’s Road running towards the promenade.

19.3 To the west there is a short stretch of road with a Church and care home on either side, after which are the large retail parks on Llandudno’s eastern side. The boundary of Craig-Y-Don’s centre lies around 700m along Mostyn Avenue from the boundary of Llandudno.

Craig- y Don as a retail and service destination

19.4 Craig y Don has 59 retail and service units. The diversity of uses within the centre is set out in Table 19.1, compared with the Goad Plan UK average and the average for all centres in Conwy County Borough.

Table 19.1- Mix of shops/service uses in Craig Y Don

Type	Number units	% units	Conwy County Borough average %	UK average %
Comparison goods retail	16	27.1	31.9	29.0
Convenience goods retail	6	10.2	8.7	9.7
Financial/professional services	1	1.7	7.7	9.0
Restaurants/cafés	6	10.2	10.7	10.0
Pubs/bars	2	3.4	4.6	4.9
Hot food takeaways	4	6.8	5.7	6.2
Other non-retail services	23	39.0	17.4	16.5
Vacant	1	1.7	13.4	14.7
Total	**59**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

19.5 The centre has a much higher proportion of other non-retail services than the UK and Conwy averages, particularly hair and beauty salons. Retail outlets occupy only 37.3% of units in the centre compared with the County Borough average of 40.6%. The proportion of convenience goods shops and hot food takeaway is also relatively high. This mix of uses reflects the centre's primary role as the local shopping and service destination. There was only one vacant retail unit within the centre at the time of Lichfields' survey (January 2022).

19.6 Craig y Don has a small selection of comparison shops (16 outlets). Not all Goad comparison categories are represented and the choice of outlets in represented categories is limited (three or less outlets). The centre has a particularly good provision of furniture/carpet and textile shops. Table 19.2 provides a breakdown of comparison units by category.

Table 19.2 - Mix of comparison goods shops – Craig y Don

Type	Number units	% units	UK average
Clothing and footwear	0	0.0	21.5
Furniture, carpets and textiles	6	37.5	7.7
Books, arts, cards and stationers	1	6.3	6.1
Electrical, music and photography	0	0.0	9.3
DIY, hardware and homeware	0	0.0	6.9
China, glass and gifts	3	18.8	5.5
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	1	6.3	12.0
Variety, department and catalogue	0	0.0	1.7
Florists, nurserymen and seedsmen	1	6.3	2.2
Toys, hobby, cycle and sports	1	6.3	5.5
Jewellers	0	0.0	5.1
Charity and second-hand shops	2	12.5	10.0
Other comparison goods retailers	1	6.3	5.2
Total	**16**	**100.0**	**100.0**

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

19.7 Boots Pharmacy and the Co-op are the only national multiple retailers (excluding charity shops). Most outlets are small independent traders.

19.8 Craig y Don has a reasonable range of service uses (36 in total) and has more service uses than the designated centres at Llanrwst, Llanfairfechan, Llandudno Junction and Penmaenmawr. Despite the relatively large number of service uses for a centre of its size, the choice of outlets in each category is limited, with the exception of hair and beauty parlours, as shown in Table 19.3.

Table 19.3- Mix of service uses – Craig y Don district centre

Type	Number units	% units	UK average
Restaurants/cafés	6	19.4	24.0
Fast food/takeaways	4	12.9	14.9
Pubs/bars	2	6.5	11.8
Banks/other financial services	1	3.2	8.4
Betting shops/casinos/amusement	1	3.2	3.8
Estate agents/valuers	0	0.0	7.8

Type	Number units	% units	UK average
Travel agents	1	3.2	1.5
Hairdressers/beauty parlours	15	48.4	26.3
Launderettes/dry cleaners	1	3.2	1.7
Sub-total	**31**	**100.0**	**100.0**
Other	5		
Total	**36**		

Source: Lichfields' land use survey January 2022 and Experian Goad Plan UK average 2021.

Retail catchment area

19.9 The retail capacity analysis suggests Craig y Don attracts a limited amount of trade from the local Zone 3 - West. About two thirds of its trade is estimated to comes from tourist visitors.

Shop rental levels

19.10 The VOA's latest Zone A retail rents indicate the highest prime pitch Zone A rents achieved in Craig y Don are £170 per sq.m, which is relatively high for one of the smaller centres in the County Borough.

Public Transport Linkages

19.11 The nearest train station is Llandudno which lies approx. 1km to the west of the main centre. There are bus stops along Mostyn Avenue and Queen's Road. Services generally run eastwards along the North Wales Expressway via Colwyn Bay, Westwards via Llandudno and Conwy, or southwards via Llandudno Junction towards Betws-y-Coed.

Car Parking

19.12 There are no dedicated car parks within Craig-y-Don's main centre, although there is on-street parking along Mostyn Avenue, Queen's Road, the promenade, and most of the surrounding residential streets.

Levels of Crime

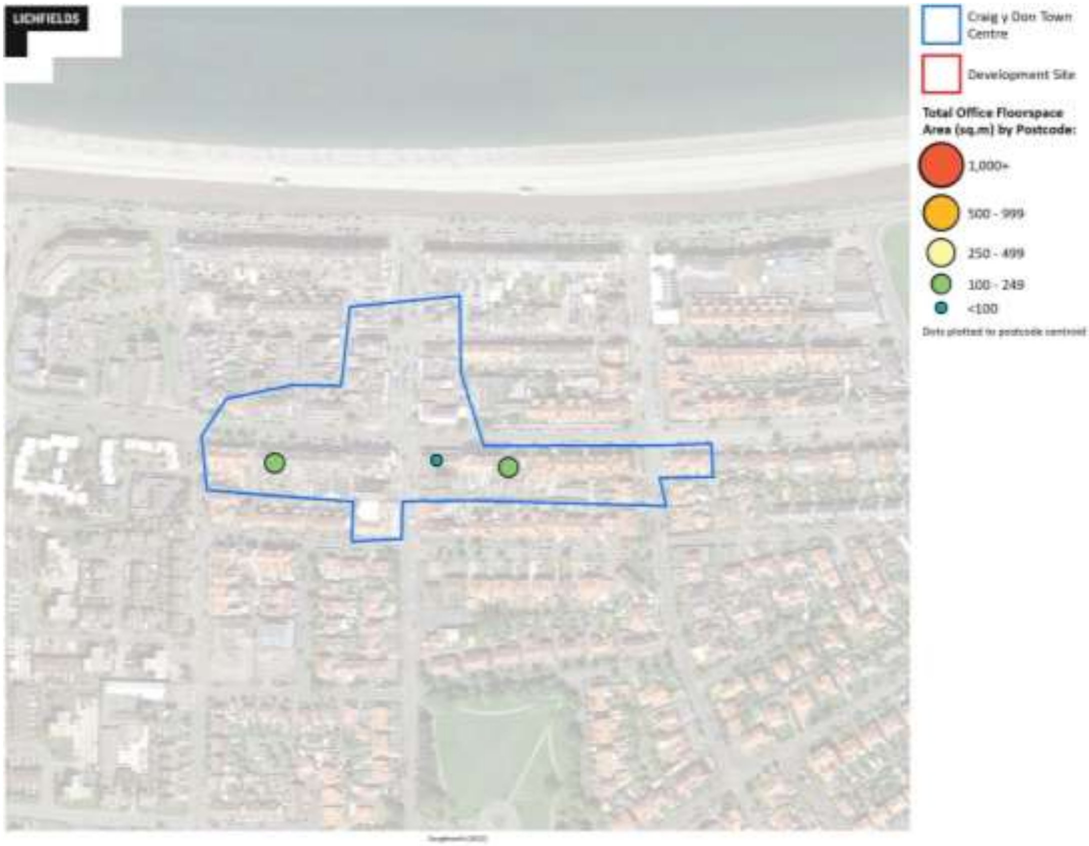
19.13 There were 331 crimes reported in Craig-y-Don in the year to March 2022, indicating a crime rate of 98.8 crimes per 1,000 people. This is lower than the Conwy County Borough crime rate of 115.8 crimes per 1,000 people over the same period and is the 9th highest rate of crime of the towns assessed in this study[15].

[15] https://www.ukcrimestats.com/Subdivisions/PRW/22356/

Craig y Don as an employment centre

Quantum, Types and Quality of Existing Floorspace

Figure 19.2 Provision of office floorspace in Craig-y-Don



Source: VOA / Lichfields

19.14 There is very little office space in the commercial centre of Craig-Y-Don, likely due to its small size and proximity to Llandudno. The VOA shows just three office units along Mostyn Avenue totalling around 400 sqm. One of these currently houses an accountant whilst two are above retail units and are not obvious from street level.

19.15 Whilst there is little office within the main centre, there is around 300 sqm of office split into multiple units in Tyldesley House on Clarence Road, which was built in 1982 and is approx. 200m from the centre. There is also around 650 sqm of office space at the Ysgol Y Gogarth and developmental care facility on Nant-Y-Gamar Road approx. 300m from the main centre.

19.16 Tyldesley House is the only office space which appears within CoStar data and is rated as 2-star quality. It is unlikely that the limited office space within the main centre exceeds this given the age of the buildings. Ysgol Y Gogarth however is a more modern facility having opened in 2014 and thus the office space is likely to be of a higher quality.

Representation of Businesses

19.17 The only visible office unit within the main centre houses an Accountancy Firm. Tyldesley House appears to be mostly occupied by North Wales Medical Trust, alongside a number of small financial and digital firms.

Stock Vacancy and Turnover

19.18 There were no obvious vacant units from a visit to the centre. A search of commercial property websites found one available unit of around 80 sqm within Tyldesley House.

Rental Levels

19.19 CoStar suggests rents of around £85 per sqm based on Tyldesley House.

Public Services

19.20 There are no public services present in the town as any provision is in nearby Llandudno.

Operator Requirements

19.21 Richard Baddeley & Co. is not aware of any operator requirements for retail or office use in the town. There were no requirements identified from Lichfields' assessment of the Requirements List as of 26th May 2022.

Customer Views

19.22 No household survey results relating to customer views available for this small centre.

Business Views

19.23 A new hospitality business was the only respondent to the survey from Craig-Y-Don, and as such they stated they had little experience of the town. Main concerns included filling vacant properties and keeping properties in a healthy state within the main centre. Other than this the business was also concerned with issues in Llandudno such as the empty Marks and Spencer's which they suggested would work well as a market space for independent traders.

SWOT Analysis

Strengths

- Craig y Don has a dual role serving both local residents in the eastern suburb of Llandudno and tourist visitors to Llandudno Bay.
- The centre has a relatively larger number of retail and services uses compared with designated local centres in the County Borough i.e. larger than Llanfairfechan, Penmaenmawr, Kinmel Bay and Deganwy.
- Craig y Don has a good provision of furniture/carpet/Textile shops and hairdressers/beauty parlours.
- The shop vacancy rate is significantly below the Country and UK averages, suggesting the demand for premises is relatively strong.
- It is a relatively compact centre located around the Mostyn Avenue and Queens Road junction. The seafront is within short walking distance.
- There are several attractive period buildings.
- The centre has relatively wide pavements, although planting and landscaping could be improved.

Weaknesses

- The Co-op store is relatively small and does not adequately cater for main and bulk food shopping.
- Traffic congestion at the Mostyn Avenue and Queens Road junction restrict pedestrian movement and has an adverse on the shopping environment.
- Th provision of off-street car parking is limited.
- The centre has a limited number of national multiples.
- The centre has limited development opportunities.

Opportunities

- Increased 'staycation' demand could increase the number of tourist visitors to the centre and seafront, providing spin off benefits to shop and services in the area.

Threats

- The polarisation of investment toward larger centres could reduce demand for premises. The centre proximity to Llandudno town centre in particular could reduce demand.
- The quality and age of retail premises in parts of the centre could restrict the ability to attract modern retailers/operators.
- The longer-term impact of Covid-19, Brexit and now the cost of living crisis may change customers' shopping habits which could reduce footfall in the town centre. This could lead to an increase in shop vacancies.

Craig-y-Don – Option Development

19.24 Craig-y-Don is a small centre which predominantly serves as a shopping location for residents and a quieter alternative to Llandudno for those looking for a coffee and some lunch. The centre has few vacant properties. The centre is relatively attractive, with the wide, boulevard-like Queen's Road heading to the seafront, some nice buildings and a good amount of trees and planting around the main intersection.

19.25 The centre appears relatively self-sustaining, benefitting from local shoppers and visitors to Llandudno and the North Shore Beach, and works well as a small and condensed centre if footfall is sustained. As such, there are only minor areas for improvement.

19.26 Whilst the centre is signposted from the promenade, the portion of Queens Road which leads from the seafront to the centre is the barest part of the town and lacks the visual draw present closer to the intersection. Extending the trees, planting and street furniture down to the promenade would help to rectify this. Similarly, this section of Queens Road is generally full of cars, with a poorly defined parking area and taxi drop-off spot in the middle of the road, which leads to cars being parked irregularly in this area. It should be considered if this small parking area is the best use of the street's width, which could instead be used to widen pavements to introduce more greenery and space for outdoor seating, whilst still maintaining parking on either side. If parking is deemed necessary, painted angled bays or defined cut-ins along the road would combat irregular parking and potentially include space for tree planting.

20.0 Strategic Recommendations

Introduction

20.1 This section draws together the analysis set out in previous sections relating to the property market reviews and option development. It provides strategic recommendations and explores how the potential distribution of future development could be accommodated, recognising the Welsh Government requires local authorities to allocate sites to meet identified needs over the plan period. It also reviews the current policy approach to offices, retail and town centres as set out in the Conwy Local Development Plan in the light of findings within previous sections of this study.

Property Market Review

20.2 The analysis of trends in Section 3 indicates the impact of the Covid-19 pandemic and Brexit uncertainties have accelerated underlying trends that have been affecting town centres for many years, including a rapid increase in online shopping and the reduction in demand for comparison goods retail floorspace. The short-term impact of increased home working has also been significant. However, recent information indicates levels of expenditure have now returned to pre-Covid levels and the impact on town centres in terms of an increase in vacant shop premises has not been as significant as previously feared. Similarly, whilst the long period of homeworking reduced footfall in many town centres causing businesses to struggle, workers are now returning to work, albeit many in a hybrid working system. A radical shift in the mix of uses within town centres is not recommended in response to these impacts, although a more flexible approach is recommended in some centres.

The Office Market

20.3 The office market in the County Borough is a mixed picture. Town Centre office accommodation tends to be poor quality smaller units, often above other uses, with over 95% of properties rated as three out of five-star quality or below, over 50% lower than two-star quality, and over 50% being built before 1950 according to CoStar data. This indicates that there is a lack of higher quality office available for businesses who require smaller spaces in central locations. Nevertheless, this existing office stock remains an important component of the market supporting smaller indigenous micro businesses by providing cheaper flexible spaces which can inherently meet these needs.

20.4 The October 2020 ELR indicated a need for 14-20ha of employment land over the RLDP period, with 35% of this (4.9 - 7ha) being for office use. However, discussions with consultees indicates that there is currently relatively little active demand for office space within Conwy, and particularly low levels of demand for office space in Town Centres. Whilst there seems to be friction between these points, current levels of demand have inevitably been affected by the Covid-19 pandemic and will pick up as firms start to encourage staff back into the office. In addition, the ELR assesses needs over the whole plan period including both central and out-of-centre office provision.

20.5 The demand that does currently exist within Conwy is primarily from existing firms looking to move to better-quality space, whether expanding or consolidating their workforce due to increased levels of home working.

20.6 Overall, the County Borough has a relatively high share of office space and low levels of vacancy, indicating that out of centre provision is playing a key role in supporting indigenous firms looking to upscale or move to more modern premises with parking facilities. The market for larger office accommodation is generally met by non-speculative out of centre developments. The market for speculative office development is currently not sufficiently strong because of lower returns. Whilst current levels of demand may be low, it is therefore important that sufficient land is protected in the longer term to ensure there is always a supply of available plots to allow for further non-speculative development.

20.7 There is a mismatch of supply and demand within the County Borough, with some existing businesses looking to consolidate into smaller but higher quality spaces of which there is a real lack in central locations. This is pushing demand into out-of-centre locations. This presents a challenge for Conwy, in that a large part of its office stock is in converted residential buildings or above retail units due to limitations present in town centres, but current limited demand and viability issues make conversions of central space and building new, purpose-built office in out-of-centre locations a hard proposition.

20.8 Overall, both market signals and discussions with commercial agents suggest that there is limited demand for office space in Conwy's town centres and no requirement for additional converted central space. Where viable and possible, conversion of lower quality office spaces in town centres to higher quality spaces or other uses may assist with attracting local businesses and reducing levels of town centre vacancy.

20.9 However, taking a longer-term view, the market's view is that the Council's focus should continue to be on stimulating inward investment to take up larger spaces in out of centre locations. This must however be balanced against PPW which places emphasis on a 'town centres first' policy, by recognising the continued importance of the town centres within the wider office market, forming a strategy to assist existing central firms with upgrading their current premises or converting existing vacant properties into modern offices. Whilst the market is currently slow, the County Borough still has a buoyant fundamentals, and should continue to plan positively for the future whilst exploring avenues to tackle the challenges with town centre conversions and speculative office space.

20.10 Table 20.1 shows the approximate amount of office floorspace within each centre (including nearby business parks) according to the VOA. Colwyn Bay stands as the main office location for the County Borough, with around 37% of all office space.

Table 20.1 Approximate provision of office floorspace across Conwy

Centre (including nearby business parks)	Approx. Office Floorspace (sqm)
Colwyn Bay	31,452
Llandudno	14,756
Llandudno Junction	11,952
Abergele	7,265
Old Colwyn	7,217
Llanrwst	4,749
Conwy	2,916
Penmaenmawr	1,429
Deganwy	1,409
Craig y Don	1,406
Llanfairfechan	272
Kinmel Bay	244
Rhos on Sea	108
Centres Total	**85,175**

Source: VOA / Lichfields

20.11 There are currently vacancies within both Colwyn Bay centre and within the larger out-of-centre office facilities. Whilst being mostly located within converted residential units or above shops, the available space in Colwyn Bay tends to be of a decent quality compared to some of the smaller centres. Along with encouraging the continued reoccupation of Coed Pella following the Covid-19 pandemic, this suggests that the focus for Colwyn Bay should be on bringing in new businesses or helping indigenous firms into new spaces.

20.12 Llandudno has a very low office vacancy rate, with good levels of demand for space in converted properties around trinity square. This would suggest that the town has a relatively self-sustaining office market. However, supply is constrained in Llandudno more support may be needed to convert remaining underutilised residential properties into further small office space in the future due to the costs being prohibitive in many instances.

20.13 Both Colwyn Bay and Llandudno could benefit from allowing increased flexibility of uses around office clusters, which may assist with bringing larger and trickier properties which are not viable for full office conversion back into use.

20.14 Llandudno Junction and Abergele both have out-of-centre business facilities which have eaten into the demand for the central, poorer quality spaces. As a result, both have central properties which are in poor states of repair and are unsuitable for modern office use or require preventative levels of investment.

20.15 Old Colwyn struggles with demand due to its proximity with Colwyn Bay, and as such also has several vacant properties and spaces above retail units that are unfit as office or for conversion to office. Again, greater flexibility in uses or council intervention may be beneficial in these instances.

20.16 Llanrwst has a small office market which includes some out-of-centre provision. There is currently space available in Glasdir in the centre, which is likely to be taken by an existing local business. There are a few vacant properties in the town centre suited to A2 use, although most properties in the centre are of poor quality and not suitable for the modern office market. Overall, there is no need for new office provision in Llanrwst until current vacancies have been filled.

20.17 Conwy only has small amounts of office within the centre but has a few buildings such as the Civic Hall, Police Station and Capel Carmel that could sustain partial office use but need investment. The town’s popularity and attractiveness would likely see smaller new office spaces taken up by local companies, although parking may be an issue.

20.18 The remaining centres have only small amounts of office space in central locations, see little demand for new office space and are relatively constrained in terms of conversion or development opportunities. As such there are no requirements for new office space, but improvement of currently available spaces should be considered.

Co-Working Office hub opportunities

20.19 Consultation with commercial agents, council officers and business owners have revealed some contrasting views on the demand for co-working space in Conwy County Borough. There is a strong sense that the modern co-working model offered by companies like WeWork would not be viable anywhere in the County Borough for several reasons. The fact that demand is uncertain, there is a general lack of the modern premises these companies typically look for within centres, and the low rental values on office space in Conwy County Borough are unlikely to make the model appealing for a large private operator.

20.20 It was also noted that workers and businesses who utilise these kinds of spaces often do so to also take advantage of other surrounding amenities such as gyms, shops, cafes, bars etc. that might be limited in many locations within Conwy County Borough and further reduce demand. A larger point is that Co-Working space is generally well served by public transport to suburban areas which again may limited the potential in many areas of Conwy where driving is likely the better option. This in turn raises the issue of parking in central locations, and whether this would also act as a deterrent in many central locations.

20.21 Commercial agents have suggested that there is no demand for co-working space coming in from business owners or potential operators, and as such the model is unlikely to succeed in the County Borough. However, a handful of respondents to the business survey suggested that they would like to see flexible drop-in spaces for working in town centres, and even smaller shared spaces available on short-term leases.

20.22 Mostyn Estates, who own a significant amount of property in Llandudno and take an active role in the direction of travel for the town, also had mixed thoughts. Mostyn operate two shared office buildings in Trinity Square which offered space on short-term leases. However, their experience is that what starts as businesses taking short leases on space in shared units evolves into more traditional longer-term leases for the whole unit. This is a success story which demonstrates how the availability of these kinds of spaces can enable businesses to start small and scale up as necessary but would be atypical of the usual co-working model.

20.23 Mostyn Estates also indicated that there is good take up of small business space when subsidised and offered for free, but these businesses rarely use the space and would likely drop out of the space if the subsidy ended.

20.24 Overall, consultees agreed that typical privately operated co-working space is unlikely to materialise anywhere in the County Borough for the reasons listed above. However, there was also a sense that if offered in the right locations, small local businesses would have interest in utilising short-term leases and workers in using drop-in office space in certain locations.

20.25 Ultimately, co-working space in Conwy County Borough would need to be a Council or Co-operative led project, potentially in partnership with other organisations that currently have space requirements or own suitable space themselves. Llandudno and Colwyn Bay, being the sub-regional centre and home to the Council respectively would be the primary contenders for co-working space.

20.26 Coed Pella, as highlighted by commercial agents, could serve as a unique opportunity to trial a shared office scheme and encourage further footfall within Colwyn Bay. It was suggested that in partnership with other public sector organisations such as Betsi Cadwaldr, Welsh Health Estates, local colleges etc. part of a floor of Coed Pella could be given over to one of these organisations to satisfy their floorspace requirements. In turn, this could contribute to subsidising the remainder of the floor as shared office space for local businesses.

Retail and Food/Beverage Development

20.27 The floorspace capacity projections up to the end of the RLDP period are summarised in Table 20.2. Overall, projections indicated modest potential for additional retail development, particularly for comparison goods retail. There is more potential for additional food/beverage uses and convenience goods retail in most parts of the County Borough.

20.28 The combined floorspace projections suggest an over-supply of floorspace in some towns primarily due to reduced demand for comparison goods retail floorspace across all centres. In other centres, the projected capacity growth for convenience goods retail and food/beverage floorspace exceeds the projected reduction in comparison good retail floorspace and there is a projected under-supply of floorspace at 2033.

20.29 The projections up to 2033, suggest the amount of comparison goods retail floorspace could reduce by about 5,100 sqm gross. Lichfields' land use survey information suggests the number of vacant units in the main centres in the County Borough is 170, as shown in Table 20.3.

Table 20.2 Retail and food/beverage floorspace capacity by 2033 (sq.m gross)

Area	Convenience retail	Comparison retail	Food/ beverage	Total
Zone 1 - Colwyn Bay	1,142	-469	454	1,127
Zone 1 - Old Colwyn	405	-27	116	494
Zone 1 - Rhos-on-Sea	-369	-77	174	-272
Zone 1 – Conwy Central sub-total	**1,179**	**-573**	**743**	**1,349**
Zone 2 - Abergele	-448	-110	176	-382
Zone 2 - Kinmel Bay	-2,366	-74	44	2,396
Zone 2 – Conwy East sub-total	**-2,814**	**-184**	**220**	**-2,778**
Zone 3 - Llanrwst	375	-71	171	475
Zone 3 - Other Conwy	-100	-38	328	190
Zone 3 – Conwy Rural sub-total	**275**	**-110**	**500**	**665**
Zone 4 - Conwy	419	-72	488	835
Zone 4 - Craig Y Don	-156	-36	50	-142
Zone 4 - Deganwy	28	-13	56	71
Zone 4 - Llandudno	-16	-3,597	770	-2,843
Zone 4 - Llandudno Junction	120	-23	150	247
Zone 4 - Llandudno Jctn, out of centre	790	-68	0	722
Zone 4 - Llanfairfechan	-152	-13	13	-152
Zone 4 - Penmaenmawr	-182	-13	20	-175
Zone 4 – Conwy West/ Creuddyn sub-total	**852**	**-3,835**	**1,547**	**-1,436**
Conwy County Borough total	**-509**	**-5,074**	**3,009**	**-2,574**

Source: Tables 5.1, 5.2 and 5.3.

Table 20.3 Retail vacancies within Conwy County Borough

Zone /centre	Total Units	Vacant units	%
Zone 1 – sub-total	**428**	**65**	**15.2%**
1 - Colwyn Bay	264	48	18.2%
1 - Old Colwyn	72	12	16.7%
1- Rhos-on-Sea	92	5	5.4%
Zone 2 – sub-total	**114**	**15**	**13.2%**
2 - Abergele	90	13	14.4%
2 - Kinmel Bay	24	2	8.3%
Zone 3 – sub-total	**82**	**21**	**25.62%**
3 - Llanrwst	82	21	25.6%
Zone 4 – sub-total	**656**	**69**	**10.5%**
4 - Llanfairfechan	44	10	22.7%
4 - Penmaenmawr	36	4	11.1%
4 - Llandudno (incl. RPs)	346	38	11.0%

4 - Llandudno Junction	41	4	9.8%
4 - Deganwy	31	3	9.7%
4 - Conwy	99	9	9.1%
4 - Craig-y-Don	59	1	1.7%
Conwy County Borough			**13.4%**

20.30 Total vacant shop floorspace is 8,500 sq.m gross, based on an average of 50 sq.m gross per vacant unit, distributed as follows:

- Zone 1 – Conwy Central 3,250 sq.m gross;
- Zone 2 – Conwy East 750 sq.m gross;
- Zone 3 – Conwy Rural 1,050 sq.m gross;
- Zone 4 – Conwy West/Creuddyn 3,450 sq.m gross.

20.31 The floorspace projections suggest convenience goods retail and food/beverage uses could occupy some of this vacant floorspace (about 5,300 sq.m gross by 2033), but this is likely to be counter balanced by the continued decline in comparison goods floorspace (about -4,700 sq.m gross).

20.32 The floorspace projections suggest the current amount of vacant floorspace in the main centres in the County Borough could increase from around 8,500 sq.m gross to over 14,000 sq.m gross by 2025, but this could reduce to around 13,300 sq.m gross in 2028 and 10,200 sq.m gross in 2033. Other non-retail uses would be required to significantly reduce existing vacancy levels in the main centres. The floorspace projections suggest, on balance, there is no need to identify site allocations for major new retail or food/beverage uses. The existing stock of premises should accommodate most if not all future growth and only small-scale developments are envisaged.

20.33 The priority centres in terms of developing Action Plans for vacant and under-utilised properties are:

- Colwyn Bay
- Llanrwst
- Llanfairfechan.

Town Centre Residential Market

20.34 Residential development can play an important role in ensuring the vitality of town centres and it may be appropriate to encourage residential development on suitable sites to increase the amount of people living in and therefore supporting the town centre's services and facilities. A lack of suitable sites suitable for new build market or affordable housing in their vicinity is a key barrier to growth.

20.35 Agents reported that there is little or no appetite for the conversion of the upper parts of retail space into apartments mainly due to the cost of complying with building and fire regulations and the return on investment. House prices vary across the County Borough and are generally higher in Conwy and Deganwy.

20.36 The increase in lower quartile affordability ratios since 2007 in the County Borough indicates that even the lower price houses may be unaffordable to those on lower incomes. In general, affordability ratios have decreased since 2007 although they have begun to increase again over the past year. High and increasing rents in an area are further a signal of stress in the housing market.

20.37 Colwyn Bay had the most properties available to let (11), but towards the bottom end in cost terms. Rental levels for 2-bed properties are highest in Llandudno, followed by Rhos-on-Sea and then Craig-y-Don, and lowest in Abergele. The handful of properties on the rental market offering 3 and 4 beds is too limited to draw any meaningful conclusions by centre.

20.38 In terms of care homes, the increase in the proportion of 65 and older residents in the County Borough would be a 5,200 increase by 2033, which could create opportunities for further care home provision. A number of care home providers are actively seeking opportunities across Wales, but there are no known requirements specifically in the County Borough. Care home providers generally require relatively large development sites capable of accommodating buildings ranging from 2,500 sq.m to over 10,000 sq.m.

Leisure Development

20.39 The fragmented and innovative nature of the leisure sector makes it difficult to precisely quantify the potential demand for these uses in the longer term. In global terms, future expenditure from residents and tourist visitors could support about 4,000 sq.m by 2033. The capacity analysis suggests there should be scope for 1,100 sq.m of additional leisure and cultural floorspace by 2025, increasing to 2,300 sq.m in 2028 and 4,000 sq.m in 2033. This additional floorspace could for example include:

- a medium sized health and fitness facility
- museums or art galleries
- a bingo club

20.40 These new uses are most likely to be provided in Zone 4 – Conwy West/Creuddyn or Zone 1 – Conwy Central, where the main concentrations of population and tourist visitors are located. The distribution of the 4,000 sq.m of new leisure and cultural floorspace by 2033 could be as follows:

- Zone 1 – Conwy Central 1,100 sq.m
- Zone 2 – Conwy East 700 sq.m
- Zone 3 – Conwy Rural 600 sq.m
- Zone 4 – Conwy West/Creuddyn 1,600 sq.m

20.41 There may be potential for some of this 4,000 sq.m of additional leisure and cultural floorspace to be accommodated in the 8,500 sq.m of vacant retail floorspace.

20.42 The development strategy for these uses should be flexible to respond to emerging opportunities for new leisure, entertainment and cultural related facilities, with priority given to the larger centres within the retail hierarchy such as Llandudno and Colwyn Bay.

Public Services

20.43 Discussions with agents revealed there is currently limited demand from public service organisations for space in Conwy County Borough, but also that the demand can come in waves. Recently, Betsi Cadwaldr University Health Board have enquired about taking some office space at Plas Eirias, whilst the Police have enquired about acquiring new training space albeit in St Asaph, Denbighshire rather than Conwy. Neither of these requirements have come to fruition despite engagement from the relevant estates teams. This does however indicate that options for new space have recently been explored.

20.44 There may therefore be an opportunity for the Council to take a more proactive approach, working with and providing options to these organisations in anticipation of future space requirements.

Recommendations

20.45 There are areas of over-arching policy interventions the County Borough should consider that affect all centre in the County Borough. The Replacement Local Development Plan – Preferred Strategy sets out an appropriate approach in seeking to ensuring the vitality and viability of town and local centres.

The Hierarchy of Centres

20.46 The network of town and local centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns. Llandudno is the largest and dominant town centre in the County Borough, consistent with its designation as a Sub-Regional Centre in the adopted and replacement plans. The other town and local centres all continue to play an important role as a focal point in their respective areas. As proposed in the Replacement LDP – Preferred Strategy it may be inappropriate to continue to differentiate between district centres and local centres because there is significant overlap in terms of size and function. The proposed downgrading of Llanfairfechan and Penmaenmawr from town centre to local centre status is consistent with other designations in terms of size and role i.e. these centres are smaller than Rhos-on-Sea and Old Colwyn. For the same reasons, the downgrading of Llandudno Junction from town centre to local centre status could also be considered by the Council.

Office Accommodation

20.47 Planning policies should be sufficiently flexible that they protect existing employment land sites suitable for offices and encourage the re-use and improvement of poor-quality upper floor accommodation in the centres. This should include flexibility on individual uses, not being overly protective of the loss of office to other economically beneficial uses, or residential to ensure that there is flexibility to maximise the beneficial use of this space and respond to market requirements. Agents reported that there is little or no appetite for the conversion of the upper parts of retail space into apartments mainly due to the cost of complying with building and fire regulations and the return on investment.

20.48 In particular, the Council should consider accepting in principle the conversion of office space to alternative uses in Llandudno Junction and Old Colwyn centres, as well as around the edge of Llanrwst.

20.49 The situation in Colwyn Bay should be closely monitored due to the availability of space within the centre, with a view to maintaining and strengthening the office cluster along and around Wynnstay Road. Similarly, the situation in Llandudno should be monitored with a view to maintaining and strengthening the office cluster around Trinity Square by encouraging office conversion in this area. A boundary and specific policy approach is not considered necessary to achieve this, however, supporting text in generic RLDP policies could guide development towards these existing clusters.

20.50 Office conversion in other centres should continue to be considered on an individual basis.

20.51 The Council should also consider direct intervention on façade and visual improvements where appropriate and targeted on wider environmental improvements in the key centres. Elsewhere they should work on encouraging existing owners / occupiers to make improvements, encouraging take-up of underutilised or vacant premises in Conwy County Borough.

Retail Need, Impact and Sequential Tests

20.52 Retail development on unallocated sites outside of designated centres should be considered against the retail need, impact and sequential tests. PPW indicates out of centre planning applications for retail development over 2,500 sq.m gross should, once a need has been established, be supported by a retail impact assessment. Planning authorities will need to determine whether an impact assessment is necessary for smaller developments, in which case these assessments should be proportionate to potential impacts.

20.53 PPW acknowledges the need to consider the impact of proposals below the 2,500 sq.m gross floorspace threshold. For example, development below the threshold may still be relatively large when compared with the size of a nearby centre, or likely to have a disproportionate effect or 'tip the balance' of a vulnerable centre.

20.54 The normal PPW minimum threshold of 2,500 sq.m gross may be an inappropriate threshold for the County Borough because this scale of retail development would exceed the overall long-term retail capacity projections for the County Borough. The low and in many cases negative retail capacity projections and uncertainties about the post-Covid recovery suggest some centres are now more vulnerable to out-of-centre developments.

20.55 Given the overlapping nature of catchment areas in Conwy County Borough, a consistent impact threshold could be applied across the authority area. However, policy should also indicate that impact assessments should be proportionate to the scale of development proposed.

20.56 The Council could consider introducing a lower impact threshold to 400 sq.m gross consistent with the Sunday trading threshold. All retail developments over 400 sq.m gross (combined) proposed outside or on the edge of designated centres would be required to prepare a proportionate impact assessment. The level of detail required in the impact assessment will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate.

20.57 The identification of centre boundaries is important when applying the sequential and needs tests, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required. The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis.

20.58 The relatively low floorspace retail capacity projections, the number of vacant shop units and assessment of potential development opportunity sites in centres suggest there is no need to extend the centre boundaries to accommodate future growth. The floorspace projections suggest an over-supply of retail floorspace, which implies the contraction of some centre boundaries could be considered. The expansion or contraction of centre boundaries should be considered on a centre-by-centre basis.

20.59 The extension of centre boundaries should only be necessary where there are existing retail/town centre uses, just outside the centre boundary, that are worthy of future protection. The contraction of centre boundaries could be considered where there is a concentration of non-town centre uses on the periphery of centres e.g. residential gaps in frontages or a concentration of vacant shop units. In most cases, the centre boundaries are relatively tightly drawn around the commercial areas and exclude surrounding residential areas.

Primary Shopping Areas and Shopping Zones

20.60 PPW (4.3.10) recommends that development plans identify the boundaries of retail and commercial centres. PPW recognises that retailing (A1) is only one of the factors that contribute to the vibrancy of town centres and policies should encourage a diversity of uses. Primary areas are typically characterised by a high proportion of A1 retail uses. Secondary areas typically contain a mix of uses. Development plans should describe the types of uses acceptable in primary and secondary areas. PPW (4.3.35) indicates where the right balance of use and activity is not being achieved, planning authorities should consider making changes to the acceptable uses in primary and secondary areas or change the centre boundaries.

20.61 The current adopted Conwy LDP defines PSAs in Llandudno and Colwyn Bay on the proposals map. Shopping Zones [SZ] are also designated in Llandudno and Colwyn Bay and some of the smaller town centres at Abergele, Conwy, Llandudno Junction, Llanfairfechan, Llanrwst and Penmaenmawr, but not in district or local/village centres. The Replacement LDP – Preferred Strategy suggests boundaries for PSAs and SZs will be identified for town centres at the Deposit stage, which presumably this will include Llandudno, Colwyn Bay, Conwy, Abergele, Llanrwst and Llandudno Junction.

20.62 The proposed redesignation of Llanfairfechan and Penmaenmawr from town centres to local centres will create an inconsistent policy approach if the Shopping Zone designations are not amended i.e. excluded from these two downgraded centres or expanded to cover other smaller centres.

20.63 Policy CFS/3 relates to the PSAs in Llandudno and Colwyn Bay town centres. This policy seeks to control the loss of Class A1 retail uses at ground floor level by restricting changes of use, subject to policy criteria. Changes of use from Class A1 are only permitted where the premises are no longer needed for retail use. To demonstrate this premises must be marketed for retail uses for at least 6 months. The change of use must also not have an unacceptable impact on the retail function or attractiveness of the primary shopping area. The supporting text to Policy CFS/3 suggested around 70% of units within the primary shopping areas of Llandudno and Colwyn Bay were in Class A1 use. Policy CFS/5 also seeks to safeguard large format retail uses at the retail parks in Llandudno.

20.64 Policy CFS/4 relates to the SZs in the eight town centres. This policy also seeks to control the loss of Class A1 retail uses at ground floor level by restricting changes of use. Changes of use are only permitted where the proposed use maintains or enhances the vitality, attractiveness and viability of the shopping centre. There are no requirements to demonstrate the premises are no longer required for retail use or to market the premises for at least six months.

20.65 Arguably, the policy criterion to maintain and enhance the vitality, attractiveness and viability of the shopping centre is more difficult to satisfy than the Policy CFS/3 criterion to prevent unacceptable impact. Policy CFS/4 could be interpreted as meaning any negative impact, significant or insignificant, would be contrary to policy because it would not maintain or enhance the centre. However, insignificant negative impacts could be acceptable under policy CFS/3.

20.66 The supporting text to these policies recognises that whilst it is necessary to protect the retail function within town centres, it is important to consider long term vacancy rates and that other uses may not harm the vitality, attractiveness and viability of centres. Reference is made to guidance in PPW relating to encouraging a diversity of uses in centres. The impact of the clustering of certain uses on the attractiveness of the centre also needs to be considered e.g. residential amenity, safety, noise and crime.

20.67 In addition to the LDP policies, further guidance was adopted in 2015 as set out in Supplementary Planning Guidance (SPG) LDP23: Change of use within town and neighbourhood centres. This SPG reiterates policies CFS/3 and CFS/4. The SPG sets out details of the appropriate marketing exercise required for Policy CFS/3. Continuous marketing is required for six months at a price that reasonably reflects the unit's value as retail premises. Details of advertising, the terms and conditions of the lease need to be provided. Evidence of any offers and expressions of interest must be disclosed. These requirements appear reasonable to ensure a valid marketing exercise has been undertaken.

20.68 The SPG also provides further information relating to retaining the retail function of the PSA and Shopping Zones, and unacceptable clusters of non-retail uses and dead frontages. Proposals should not have an unacceptable impact on residential amenity, public safety, noise and crime. The assessment of impact should be based on town centre health checks. The SPG provides clear guidance.

20.69 Policy CFS/6 safeguards community facilities outside of the main eight designated town centres where no similar facilities exist. Community uses include convenience goods shops, post offices es, petrol stations, village/church halls and public houses. The loss of these community uses will only be permitted where it can be demonstrated that the building is no longer viable for its existing use and there is no continuing community need for the facility. This policy will include facilities within designated district and local centres. However, community uses could be equally important in the smaller town centres such as Llandudno Junction, Llanrwst and Llanfairfechan.

20.70 The PSA and SZ designations need to be reconsidered in the context of the trends and changes; the centre health checks and the updated retail floorspace capacity projections. There are four broad policy approaches that could be considered for future policy, as follows:

1 strengthening policies to provide more control over the loss of Class A1 uses. This would usually involve extending the PSA/SZ and/or increasing the restrictions on uses permitted;

2 retaining the existing approach to control the mix of uses as currently set out in adopted policy;

3 relaxing existing policies to allow a more flexible approach to enable more non-retail uses. This would usually involve reducing the PSA/SZ and/or introducing more flexibility; or

4 a laissez-faire approach that does not seek to protect retail or other town centre uses, on the basis that the market will determine the appropriate mix of uses within centres.

20.71 Based on the current mix of uses and relatively high shop vacancy rate in some centres, strengthening the current policy restrictions may not be justified or appropriate i.e. implementation of these policies could stifle investment and exacerbate the high shop vacancy rate. Considering current and likely future market trends, the revised retail floorspace capacity projections, Option 1 may be unsound. Demand from retail occupiers has reduced and the updated comparison and convenience goods floorspace projections are much lower than previous projections. As a result of these recent changes and the current land use mix in some centres, Options 3 and 4 now appear to be the most appropriate approaches. Minor changes to the PSA/SZ to accommodate individual units where change of use has occurred may also be necessary.

Residential Conversion in Town Centres

20.72 Conwy County Borough's town centres and retail stores are suitable locations for residential and mixed-use development as they are generally very well served by public transport and supported by the co-location of employment uses and social infrastructure. The accelerated repurposing and downsizing of an element of retail space forecast in this report creates opportunities to bring forward of a wider range of uses including residential, community uses and more agile flexible spaces serving multiple functions to ensure that the County Borough's towns remain vibrant and attractive places to live and visit.

20.73 As demand for retail space recedes, it is more important than ever that CCBC's town centres become even more attractive places to live. As well as making an invaluable contribution to housing supply in the urban areas, maintaining a meaningful 24-hour population in town centres will in turn drive demand for services and facilities which contribute to the vitality and viability of the centres. This may require straightforward adjustments to policy, or it may require something more radical such as the removal of buildings and / or the contraction of centres.

20.74 This could be through increasing the numbers of new homes being delivered above a wider range of ground floor uses and on the edges of consolidated town centres including through build to rent provided alongside co-working space.

20.75 Approaches to support town centre living were discussed with a range of stakeholders and concerns were expressed regarding the viability of conversions, the safety and amenity of future residents and the security of existing ground floor businesses. As such, whilst it is recommended that the Council should allow an increased level of flexibility when considering retail to residential conversions in Conwy County Borough's own centres, there will remain a need to protect the safety and amenity of the residents and retain security of access for businesses. The Council's policies relating to design and residential amenity should be applied where appropriate to ensure that the development is not substandard.

20.76 The Council may also wish to explore a range of delivery options to ensure that such schemes remain viable, including the potential for an urban living / conversions grant assistance scheme to stimulate building conversions. Conversion of larger properties to Houses in Multiple Occupation [HMOs] may also be a potential way to deliver town centre housing. In order to facilitate this, it is recommended that residential development will be permitted in all the named centres on appropriate sites where a number of criteria such as the following are met:

- on upper floors within primary and secondary shopping frontages, where identified;
- on backland sites with no street level retail and ground floor commercial frontages including within defined Town and Local Centre boundaries;
- within any area that has been formally identified by CCBC for planned contraction of the Town Centre boundary;
- operations of existing and future businesses and community facilities are not adversely impacted by the proposed development/conversion.

Physical and Management Improvements

Public Realm

20.77 The provision of street furniture and landscaping in the main centre varies between centres and within different areas within the centre. Provision is not of the same standard. The use of more and improved street furniture and landscaping could improve the attractiveness of the streetscape and could make the public spaces more useable and pedestrian friendly.

20.78 The use of 'standard' street furniture, landscaping and public art could help to provide a distinctive identity for each centre. There are many opportunity areas to improve these elements The analysis of centres suggests the priorities for improvement are:

- Colwyn Bay;
- Llandudno Junction; and,
- Kinmel Bay.

20.79 The environmental improvements that have been implemented in centre do not aways extend into unattractive side streets and peripheral areas. These areas often have damaged paving which is poorly maintained and collect litter. Certain areas of the town centre, for example outside takeaways and around litter bins, are also untidy and could be cleaned more regularly.

20.80 The benefits of providing more and improved street furniture, landscaping, public art and litter bins should be considered in more detail within the priority centres. Existing cleaning and maintenance arrangements should be examined to consider if there are improvements that could be implemented. Untidy black spots may need to be cleaned on a more regular basis.

20.81 Public and occupier awareness regarding the benefits of keeping the town centre clean and well maintained should be improved. The introduction of town centre management initiatives could help to improve this.

Shop Frontages

20.82 The quality of some shop frontages in town centres could also be improved, which would help to improve the overall image of each centre. The quality of shop frontages and fascia varies considerably. Some frontages in peripheral areas are dated and others need repairs and redecorating. These frontages can detract from the overall image of the town centre for example in Colwyn Bay.

20.83 In many cases minor improvements such as the provision of new shop signs and repainting would significantly improve the appearance of rundown units, without the need for significant investment. Occupiers should be encouraged to keep their shop frontages well maintained.

20.84 The implementation of a Town Centre Loan scheme should assist in improving shop premises. The County Borough Council could consider the introduction of shop front awards, e.g. annual awards for the best “modern” or “traditional” shop fronts and the best window displays. This could help to build civic pride amongst occupiers and customers. Websites and leaflets with nomination forms for customers could promote this scheme. The County Borough Council should promote the benefits of improved shop frontages and provide guidance for occupiers/landlords, emphasising the need for:

- well maintained and repaired architectural features;
- limited use of posters stuck to windows;
- sympathetically designed shop-fronts;
- the use of materials in keeping with the rest of the character of the building and the streetscape; and
- the limited use of external plastic and internally illuminated plastic box type fascia.

20.85 This type of guidance could help to encourage owners and tenants to improve their signs and redecorate their shop-fronts.

Impact of Conservation Areas on Town Centres

20.86 Agents were not of the opinion that conservation areas have proven a noteworthy barrier to development or the reoccupation of vacant units, other than occasional instances where it may be argued that certain buildings are unreasonably listed. In general, aside from being an additional hoop to jump through, it was considered they are appropriate for maintaining the character of town centres.

20.87 The only potential issue raised was instances where the internal layout of properties cannot be significantly altered to suit a particular use. The example used was the vacant but newly renovated property at 7 Abergele Road, Colwyn Bay, where the protection of interior heritage elements during renovations limited the reconfiguration of the space and therefore the range of suitable uses. This is however down to the listed status of the building rather than conservation area policies.

20.88 Overall, it was felt that the current approach to conservation in town centres was generally appropriate and applications should continue to be considered on an individual basis against these criteria. However, Lichfields suggests that further research as to the effects of conservation areas on town centre regeneration be undertaken by the Council if these policies are to be reviewed in detail.

Marketing, Management and Promotional Activities

20.89 Most of the centres, with perhaps the exception of Llandudno and Colwyn Bay, are in our view too small to warrant a full-time town centre manager. However, the employment of a shared town centre manager could be explored. A more co-ordinated approach towards the maintenance and promotion of each centre in the future would assist the centre's vitality and viability. A review of the existing maintenance and management activities in each centre would be beneficial to explore how existing activities can be improved and the involvement amongst businesses improved.

20.90 The successful promotion of each centre requires the continued improvement to the physical fabric and the availability of range of shops/services. However, it will also require a co-ordinated approach from all those responsible for promoting and marketing each centre. Current activities appear to be limited in most centres and could be improved in two key areas:

- the introduction of promotional activities; and
- broadening the level of involvement amongst businesses and community groups.

20.91 The successful marketing of each centre could be achieved through the use of promotional brochures/websites and property registers. Property registers provide information on commercial properties available within each centre and can assist local agents to market opportunities as they arise. Websites and leaflets can also provide valuable details for customers relating to facilities available.

20.92 The availability of existing promotional information and town centre guides is relatively limited and fragmented. The quality of material should be improved. There is limited information on the shops and services available within centres across the County Borough. There is no comprehensive list of facilities and there are no detailed maps of the centres showing the location of shops, community facilities, pedestrian linkages, car parks and bus stops. The limited information regarding shops and services in each centre is unlikely to encourage residents to visit.

20.93 Future marketing material, either for potential customers or investors should build on the existing promotional material and could contain the following elements:

- a corporate identity for each centre with a consistent theme, which should be replicated in all other forms of marketing;
- clear plans illustrating the layout and format of the centre showing key occupiers;
- a summary of other attractions in the area;
- key statistics including the provision and location of car parking, public transport and catchment profile information; and,
- contact details.

20.94 The initial cost of producing high quality websites and leaflets can be modest and these can be used for on-going direct marketing campaigns to a range of potential occupiers and customers. Occupiers could consider the introduction of customer loyalty schemes, allowing businesses to offer their own discounts or promotions.

20.95 Future promotional initiatives should involve the private sector and interest groups. The broad benefits of co-ordinated promotion and management need to be conveyed to businesses. Financial contributions are not the only valid form of involvement. Operators can contribute in other ways, for example participation in events or by just expressing their views and ideas. The adoption of a strategy for each centre provides an opportunity to broaden the private sector's involvement in future initiatives.

Safety and Crime

20.96 Crime and safety appear to be issues in the larger centres, i.e. Llandudno, Colwyn Bay and Abergele. The coverage of the CCTV systems should be carefully monitored and extended into unmonitored areas if necessary. Co-ordination between occupiers can also help to reduce crime, including theft, attacks and vandalism.

20.97 On-street drinking and begging blackspots do not appear to be a significant issue, but the possible introduction of a drinking free zone could be explored with the Police if this problem arises. Proposals for a Public Open Space Protection Order (PSPO) have previously been considered/consulted on. Current PSPO are in place in Colwyn Bay town centre and Conwy town.

Implementation and Partnership Development

20.98 The list of improvements set out in this study could in total be costly. It is unlikely that all the improvements can be implemented within a short timetable across all centres. It will be necessary to target specific priorities.

20.99 Public resources are already being spent within each centre, including cleaning and road / lighting maintenance. Improvements such as new street furniture or landscaping could be implemented as part of the on-going maintenance work already undertaken. It will be necessary to quantify and specify what resources are already being spent in each centre before any additional funding is identified. This may require co-ordination between departments within the County Borough Council and Town Councils. A more structured and co-ordinated approach could lead to a more efficient use of existing funds.

20.100 Improvements will require a partnership approach between Town Councils, the County Borough Council, the Welsh Government, the Police, occupiers and other interest groups. Investors, occupiers and users will all need to be persuaded of the approach. Agreement and broad ownership of the conceptual strategy and vision at an early stage is essential to the future success of selected improvements. The findings of this report should be disseminated to existing occupiers and meetings to discuss the recommendations would be beneficial. Place Plans, which provide a mechanism for communities to engage with the planning process in support of place-making initiatives, could be a useful and appropriate tool to frame this process.

20.101 Local traders should be encouraged to form their own management and promotional initiatives. Traders forums could be established and should meet regularly. Within this framework, local initiatives could be encouraged and the appropriate links with the Town Councils, County Borough Councils departments put in place.

20.102 Some initiatives that could be implemented and co-ordinated by trader partnerships may not be costly. For example, customer loyalty schemes, crime watch schemes, hanging baskets/planting and marketing exercises to promote their centre within the community.

20.103 A partnership process involving the Council and traders could provide the impetus for setting and achieving an overall strategy for each centre. Joint working between the Town Councils, different County Council departments responsible for planning, highways, maintenance and management is essential.

20.104 Possible improvements required in the larger centres may need to be translated into detailed action plans, highlighting proposed works required, timetables, priorities and funding. Partnership development and the preparation of agreed strategies should have a positive benefit on subsequent bids for funding.

21.0 Centre-Specific Recommendations

Introduction

21.1 This section draws together the analysis set out in previous sections relating to the town centre health checks and option development. It provides centre-specific recommendations building on the strategic recommendations in the previous section.

Centre Analysis

21.2 A detailed health check and SWOT analysis has been undertaken for the network of centres across the County Borough. A summary the centre analysis is shown in Table 21.1 overleaf. This summary highlights the priorities for intervention in each centre.

21.3 In overall terms, most centres appear to be performing well or at least satisfactorily despite difficult market conditions. The best performing centres are Llandudno, Conwy and Rhos-on-Sea, with an overall rating of 'Good'. The weakest performing centres are Colwyn Bay, Llandudno Junction and Kinmel Bay, with an overall rating of 'Poor'. There are several areas of possible action Conwy County Council and other key players could pursue to address issues of concern in each centre, for example:

- the implementation of planning policies within the Development Plan;
- the development of Place Plans for towns;
- the implementation of further public realm improvements;
- measures to tackle vacant units and premises with poor shop frontages;
- the creation of town centre management and promotional activities; and,
- measures to bring forward development opportunities.

21.4 The network of centres is currently set out in adopted Policy CFS/2 of the Conwy Local Development Plan. The Replacement Local Development Plan – Preferred Strategy suggests amendments to the retail hierarchy. Continuing to identify the hierarchy of centres in the Replacement Development Plan is required by PPW and is important in terms of:

- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and,
- identifying a viable role and strategy for each centre.

Table 21.1 Town Centre Health Check and SWOT Analysis Summary

	Llandudno	Abergele	Colwyn Bay	Conwy	Llandudno Junction	Llanrwst	Deganwy	Kinmel Bay	Llanfairfechan	Old Colwyn	Penmaenmawr	Rhos-on-Sea	Craig-y-Don
Choice of Convenience Retail	High	High	Medium	Medium	High	Medium	Low	High	Medium	High	Low	Medium	Medium
Choice of Comparison Retail	High	Low	Medium	High	Low	Medium	Low	Low	Low	Low	High	High	Medium
Level of Retail Vacancies	Medium	Medium	High	Low	Low	High	Low	Low	High	Medium	Low	Low	Low
Choice of Service uses	High	Medium	High	Low	Medium	High	High	Low	Medium	High	Low	Medium	High
Overall range of shops	Good	Low	Medium	Good	Medium	Medium	Low	Medium	Medium	Medium	High	Medium	Medium
Quality of retail units for modern occupiers	Medium	Poor	Medium	Medium	Poor	Poor	Medium	Low	Medium	Medium	Medium	Low	Medium
Quality of Food and Drink offer	High	Medium	Low	High	Low	Low	High	Medium	Medium	Medium	High	High	Medium
Health of night-time economy	High	Medium	Low	Medium	Low	Low	Medium	Low	Medium	Low	Medium	High	Medium
Range and choice of community uses	Good	Poor	Medium	Medium	Poor	Good	Poor	Medium	Medium	Medium	Medium	Medium	Poor
Size of catchment area	Extensive	Localised	Extensive	Extensive	Localised	Localised	Moderate	Localised	Localised	Localised	Localised	Moderate	Moderate
Operator Requirements	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Attractiveness to tourists	High	Medium	Low	High	Low	Medium	High	Medium	Medium	Low	High	High	Medium
Length of Stay	High	Low	Low	High	Low	High	Medium	Low	Medium	Medium	Low	High	Low
Overall customer satisfaction	High	Low	Low	High	Low	Medium	Medium	Low	Medium	Medium	Medium	High	Medium
Footfall	High	Medium	Low	High	Low	Medium	Low	Low	Medium	Medium	Low	High	Medium
Quality of the built environment	High	High	Poor	High	Poor	High	Medium	Poor	High	Medium	High	Medium	Medium
Pedestrian safety / walkability of the centre	Medium	Low	Good	Medium	Medium	Medium	Low	Low	Medium	Low	High	Medium	Medium
Car Parking	Good	Medium	Good	Poor	Good	Good	Good	Good	Good	Medium	Medium	Poor	Poor
Traffic congestion	Medium	High	Medium	High	Medium	Medium	Medium	Medium	Medium	Medium	Low	Medium	Medium
Public transport accessibility	Good	Medium	Good	Medium	Good	Medium	Medium	Poor	Medium	Medium	High	Medium	Medium
Crime Levels	High	High	High	Low	Medium	Low	Low	Medium	Low	Medium	Low	Medium	Low
Strength of office market	Weak	Weak	Medium	Weak	Weak	Medium	Weak	Weak	Weak	Medium	Weak	Medium	Medium
Quality of office premises	Poor	Poor	Good	Poor	Poor	Medium	Poor	Weak	Weak	Medium	Low	Low	Medium
Office vacancy levels	Low	Low	Medium	Low	Low	Medium	Low	Low	Low	Medium	Low	Low	Low
Development opportunities	Medium	Medium	High	Low	Medium	Medium	Low	Low	Low	Low	Low	Low	Low
Business / Visitor Sentiment	Strong	Medium	Weak	Strong	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Strong	Medium
Overall attractiveness & health of Centre	**Good**	**Medium / Poor**	**Poor**	**Good**	**Poor**	**Medium**	**Medium**	**Poor**	**Medium**	**Medium**	**Medium / Good**	**Good**	**Medium**

Source: Lichfields analysis – Sections 7.0 to 19.0

Llandudno

21.5 Llandudno is performing well and should continue to be designated as a Sub-Regional Centre at the top of hierarchy. The centre is not a priority for physical or public realm improvements. The retail and food/beverage floorspace projections suggest an over-supply of about 2,800 sq.m gross in 2033, due to a decrease in demand for comparison goods retail floorspace. Vacant units should be capable of accommodating demand for new retail and town centre uses. No major addition retail development is required. The potential loss of retail floorspace and vacancy rate should be monitored and a more flexible policy approach to changes of use may need to be considered.

21.6 Llandudno has a well-established office cluster around Trinity Square. Alongside a purpose-built office building the area features a number of residential properties which have been converted to office use. These properties are well maintained, and vacancies are low. As such the area forms a successful office hub for the town and increased flexibility in uses is not necessary. In addition, there may be scope to convert additional surrounding residential properties to office use in the future. Conversion of office to residential or non-B-class uses in other parts of Llandudno should be considered on an individual basis, mindful of the potential effects in strengthening the Trinity Square cluster. There may also be opportunities to explore shared working in some of the Council's vacant office spaces as well as within a larger mixed development in the old M&S building, although incentives may be required to attract occupiers.

21.7 The PSA in Llandudno covers the main shopping spine along Mostyn Street. About half of the shop units within the centre are included in the PSA. The vacancy rate in the PSA is 8.1% compared with 10.3% across the centre. The proportion of A1 uses within the PSA is 67% excluding vacant units, which is only slightly lower than the 70% figures suggested by the supporting text to Policy CFS/3. The relatively low vacancy rate and continued predominance of A1 uses suggest Policy CFS/3 has been relatively successful in Llandudno.

21.8 **A contraction of the PSA is not considered necessary to tackle vacancy levels.**

21.9 The second policy criterion could be strengthened with reference to maintaining or enhancing the vitality, attractiveness and viability of the centre.

21.10 The SZ in Llandudno includes nearly 40% of shop units within the centre. The vacancy rate in the SZ is 12.1% compared with 10.3% across the centre. The proportion of A1 uses within the SZ is 55% excluding vacant units. Outside the PSA and SZ the vacancy rate is 10% and the proportion of A1 uses is only 22%. These peripheral areas provide sufficient flexibility to allow new non-A1 uses into the town centre. **No contraction or expansion of the SZ is considered necessary.**

21.11 Llandudno has a small but stable office market which is dominated by A2 uses. The main office area is in and around Trinity Square which contains a broad range of traditional converted space which is freehold, long leasehold and tenanted accommodation. Whilst there is some vacant office space in the town, it is not deemed necessary to proactively intervene as the market is relatively self-sustaining. Trinity Square should be encouraged as an office cluster by encouraging changes of use to office in the area.

21.12 Development objectives for Llandudno include:

- Improve the range of experiences on offer to cater for younger people, families, wet weather, and evenings;
- Diversify the food & drink offer including a market;
- Improve connections from the station to the centre, and the centre to the promenade/pier;

- Improve the look and feel of the centre; and,
- Leverage the success and potential of the town into positive marketing.

Abergele

21.13 Overall Abergele is performing satisfactorily. The centre could benefit from physical or public realm improvements, but this is not a priority when compared with other centres. The retail and food/beverage floorspace projections suggest a small over-supply of about 400 sq.m gross in 2033. Vacant units should be capable of accommodating demand for new retail and town centre uses. No major addition retail development is required.

21.14 There is no PSA within Abergele town centre. The SZ covers nearly all commercial uses in the centre. The vacancy rate in the centre is 14.4% compared with the County Borough average of 13.4%. The proportion of A1 uses is nearly 62%. Despite the relatively high vacancy rate, vacant premises are spread throughout the centre.

21.15 **A contraction of the SZ is not considered appropriate to tackle vacant units. However, a more flexible policy for the SZ could be considered.**

21.16 Abergele features small individual office units along the high street above retail frontages, as well as office use within the old Town Hall building. As there is no identifiable cluster, conversion to residential or non-B-class use should be considered on an individual basis taking into account the condition and suitability of the property for the modern office market and alternative use.

21.17 Development objectives for Abergele include:

- Establish western gateway to the centre and improve linkages with Tesco;
- Better traffic and parking management; and,
- Improve the look and feel of the centre.

Colwyn Bay

21.18 Overall Colwyn Bay is performing poorly when compared with other centres. The centre would benefit from physical or public realm improvements, and this is a priority when compared with other centres. However, the retail and food/beverage floorspace projections suggest an under-supply of about 1,100 sq.m gross in 2033 due to potential growth in the convenience goods retail sector and food/beverage uses. Vacant units should be capable of accommodating most of this demand for new retail and town centre uses. Mixed use development could be promoted.

21.19 **The potential loss of retail floorspace and vacancy rate should be monitored and a more flexible policy approach to changes of use may need to be considered.**

21.20 **An action plan to tackle vacant and under-utilised properties in the centre should be considered. The contraction of the centre boundary to the east of Colwyn Bay could be considered along Abergele Road e.g. excluding uses east of Erw Wen Road. The northside of Abergele Road could also be excluded from the SZ and a more flexible policy for the SZ could be considered.**

21.21 The PSA in Colwyn Bay includes the Bayview Shopping Centre, Sea View Road, Station Road and a small part of Conway Road/Abergele Road. About a third of the shop units within the centre are included in the PSA. The vacancy rate in the PSA is 21.2% compared with 18.2% across the centre. **The relatively high vacancy rate suggests Policy CFS/3 may have prevented some vacant units from being reoccupied.** There is a concentration of vacant units in Station Road. **Station Road could be redesignated from PSA to SZ, allowing more flexibility.**

21.22 The SZ in Colwyn Bay includes over half of shop units within the centre. The vacancy rate in the SZ is also relatively high at 15%. As indicated above, the SZ could be contracted to the east of the centre along Abergele Road. The southside of Abergele Road, number 82 onwards is predominantly in residential use and this area should be excluded from the SZ and centre boundary. The northside of Abergele Road from Erw Wen Road could also be excluded from the SZ to allow more flexibility for alternative uses. This suggested boundary is shown in Figure 21.1.

21.23 Colwyn Bay features office use throughout and several business centres. The main office cluster is along Wynnstay Road, where residential properties have been converted to office use, and vacancies are currently low. Elsewhere in Colwyn Bay, there is space currently available in the Commodore Business Centre at the top of Wynnstay Road and minimal small vacant office units above retail frontages. As such, Wynnstay Road currently provides small office spaces and serves a need within Colwyn Bay.

21.24 **Whilst greater flexibility in uses is not currently deemed necessary on Wynnstay Road, the situation should be monitored due to vacancies elsewhere in the town and changing office requirements. Conversion of office units towards the eastern side of the centre should be more strongly considered in order to enhance the office cluster ono the western side of the town.**

Figure 21.1 Colwyn Bay proposed town centre boundary

Source: Lichfields

21.25 Development objectives for Colwyn Bay include:

- Develop a strategy to fill vacant properties;
- Review the pedestrianisation of Station Road;
- Improve linkages between the train station, Station Road, the Bay view centre, and the promenade; and,
- Maximise the use of Coed Pella.

Conwy Town Centre

21.26 As a major tourist destination, Conwy is performing well. The centre is not a priority for physical or public realm improvements. The retail and food/beverage floorspace projections suggest a small under-supply of about 800 sq.m gross in 2033. Vacant units and small-scale developments should be capable of accommodating the demand for new retail and town centre uses.

21.27 There is no PSA within Conwy town centre. The SZ covers most of the commercial uses in the centre. The vacancy rate in the centre is 9.1% compared with the County Borough average of 13.4%. The proportion of A1 uses is about 50%. The relatively low vacancy rate and continued predominance of A1 uses suggest Policy CFS/4 has been relatively successful in Conwy.

21.28 **An expansion of the SZ is not considered necessary to include un-protected uses.**

21.29 Of all the towns in this study, Conwy is the most self-sustaining and the least in need of intervention. Whilst Conwy has no real issues with vacant retail properties, Conwy Civic Hall and the former Palace Cinema building are both historic listed buildings in prominent locations and in need of investment and repurposing.

Llandudno Junction

21.30 **Llandudno Junction is a relatively small centre and could be downgraded to Local Centre status,** along with Llanfairfechan and Penmaenmawr. Overall, the centre is performing poorly when compared with other centres. The centre would benefit from physical or public realm improvements and this a priority when compared with other centres. The retail and food/beverage floorspace projections suggest a small under-supply of about 200 sq.m gross in 2033. Vacant units should be capable of accommodating demand for new retail and town centre uses. No major addition retail development is required.

21.31 Llandudno Junction has no PSA. The SZ covers the main concentration of shop units along Conwy Road. The vacancy rate in the centre is 9.8% compared with the County Borough average of 13.4%. The proportion of A1 uses is over 63%. **If Llandudno Junction retains its designation as a Town Centre, a contraction or expansion of the SZ is not considered necessary to tackle vacancy levels or include un-protected uses.** Llandudno Junction features minor features very minor office use along the high street in low-quality units above retail frontages. The centre is also close to several out-of-centre business facilities with current availability. **Acceptance in principle of conversion to residential or non-B-class use should be considered.**

Llanrwst

21.32 Overall Llanrwst is performing satisfactorily. The centre could benefit from physical or public realm improvements, but this is not a priority when compared with other centres. The retail and food/beverage floorspace projections suggest a small under-supply of about 500 sq.m gross in 2033. Vacant units should be capable of accommodating demand for new retail and town centre uses. No major addition retail development is required.

21.33 There is no PSA within Llanrwst town centre and the SZ covers most commercial uses in the centre. The vacancy rate in the centre is 25.6% compared with the County Borough average of 13.4%. Vacant units are distributed around the centre. The proportion of A1 uses is nearly 49%.

21.34 **A contraction of the SZ is not considered appropriate to tackle vacant units. However, a more flexible policy for the SZ could be considered. An action plan to tackle vacant and under-utilised properties in the centre should be considered.**

21.35 Llanrwst has small individual office use throughout with no identifiable cluster. The town also has a high number of vacant properties which are in need of investment or are unsuitable for office conversion. Office space is currently available within Glasdir. **Conversion to residential or non-B-class use should be considered on an individual basis taking into account the condition and suitability of the property for the modern office market and alternative use. Conversion preference should be given to those properties towards the edge or outside of the town centre boundary.**

21.36 Development objectives for Llanrwst include:

- Develop a strategy for filling vacant units;
- Diversify the tourism offer; and,
- Improve the look and feel of the centre.

Deganwy

21.37 Deganwy is a small centre which is performing satisfactorily. The centre could benefit from physical or public realm improvements, but this is not a priority when compared with other centres. The retail and food/beverage floorspace projections suggest a small under-supply of less than 100 sq.m gross in 2033. Vacant units should be capable of accommodating demand for new retail and town centre uses. **No major addition retail development is required.**

21.38 The only development objective for Deganwy is to maintain and improve the train station, car parks and public realm.

Kinmel Bay

21.39 Kinmel Bay is performing poorly when compared with other centres. The centre would benefit from physical or public realm improvements and this a priority when compared with other centres. The retail and food/beverage floorspace projections suggest a large over-supply of about 2,400 sq.m gross in 2033, but this relates under-trading at the Asda store. Vacant units should be capable of accommodating demand for new retail and town centre uses. No major addition retail development is required. Overall, there is scope to make the centre more attractive, reduce the visual impact to the Asda, and create a better experience for those walking and cycling to/from the shops and the beach.

Llanfairfechan

21.40 **Llanfairfechan should be downgraded from town centre to local centre status.** However, the centre is performing satisfactorily. The centre could benefit from physical or public realm improvements, but this is not a priority when compared with other centres. The retail and food/beverage floorspace projections suggest a small over-supply of less than 200 sq.m gross in 2033. Vacant units should be capable of accommodating demand for new retail and town centre uses. No major addition retail development is required. However, **an action**

plan to tackle vacant and under-utilised properties in the centre should be considered.

21.41 Development objectives for Llanfairfechan include:

- Develop a strategy to fill vacant shops;
- Improve the main intersection;
- Improve linkages between the centre and station/seafront; and,
- Improve the look and feel of the centre.

Old Colwyn

21.42 Old Colwyn is performing satisfactorily. The centre could benefit from physical or public realm improvements, but this is not a priority when compared with other centres. The retail and food/beverage floorspace projections suggest a small under-supply of about 500 sq.m gross in 2033. Vacant units should be capable of accommodating demand for new retail and town centre uses. No major addition retail development is required

21.43 Old Colwyn features very minor office use along the high street in low-quality units above retail frontages. These units are towards the middle of the high street where there is a cluster of vacant properties. Due to the quality of the units and proximity to Colwyn Bay, acceptance in principle of conversion to residential or non-B-class use should be considered. The remaining centres have very minor office use likely serving local needs, and no identifiable clusters. **Conversion to residential or non-B-class uses in these locations should be considered on an individual basis.**

21.44 Development objectives for Old Colwyn include:

- Consider encouraging increased flexibility of uses; and,
- Improve the Victoria Street car park.

Penmaenmawr

21.45 **Penmaenmawr should be downgraded from town centre to local centre status.** Based on this recommended lowering of its position in the retail hierarchy, the centre would be categorised as performing satisfactorily. The centre could benefit from physical or public realm improvements, but this is not a priority when compared with other centres. The retail and food/beverage floorspace projections suggest a small over-supply of less than 200 sq.m gross in 2033. Vacant units should be capable of accommodating demand for new retail and town centre uses. No major addition retail development is required.

21.46 There is potential to narrow the carriageway or introduce traffic calming to allow for more space for pedestrians. Temporary street furniture could also be used to segment outdoor eating/drinking space. Signposting and waymarking of the pedestrian route to the station and through to the promenade could be improved. Other than this, ongoing maintenance of the buildings, street furniture and planting should be ensured to protect the attractiveness of the centre.

Rhos-on-Sea

21.47 As a tourist destination, Rhos-on-Sea is performing well. The centre is not a priority for physical or public realm improvements. However, the retail and food/beverage floorspace projections suggest an over-supply of about 300 sq.m gross in 2033. Vacant units should be capable of accommodating the demand for new retail and town centre uses.

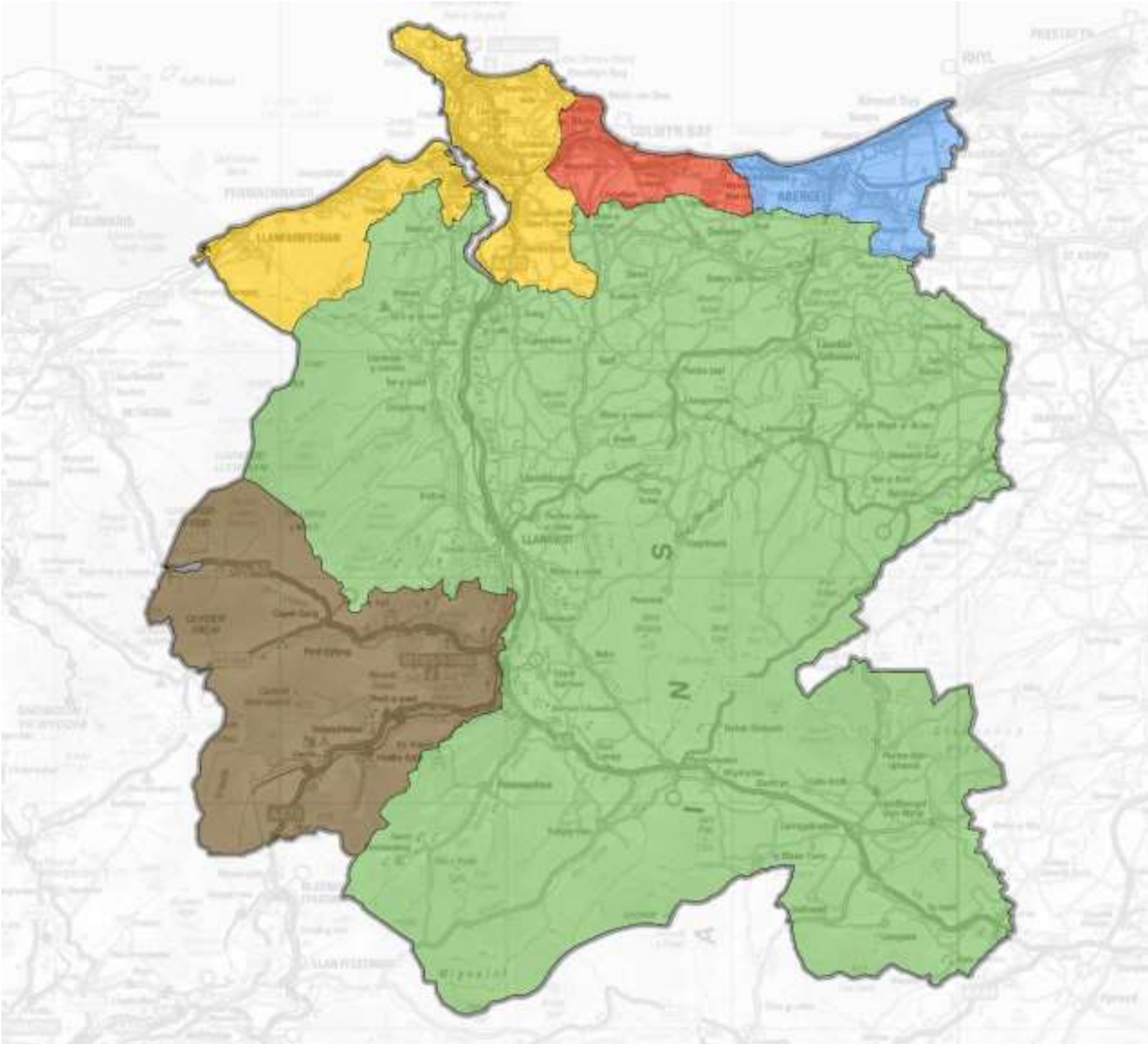
21.48 Issues facing the town are relatively minor. There may be scope to rethink car parking in some areas, as most streets within the centre are lined with cars at busy times, which can detract from the feel of the town. Linked to this, the town has poor provision of outdoor eating and drinking space.

Craig-y-Don

21.49 Craig-y-Don is performing satisfactorily. The centre could benefit from physical or public realm improvements, but this is not a priority when compared with other centres. The retail and food/beverage floorspace projections suggest a small over-supply of less than 200 sq.m gross in 2033. Vacant units should be capable of accommodating the demand for new retail and town centre uses.

21.50 The centre is relatively self-sustaining, benefitting from local shoppers and visitors to Llandudno and the North Shore Beach, and works well as a small and condensed centre if footfall is sustained. As such, there are only minor areas for improvement, including rationalising of car parking in some areas and improved greening.

Appendix 1 Study area and population



Key

Retail Areas:

- Central
- East
- Rural
- SNPA
- West & Creuddyn

Table 1 - Study area population projections

Zone	2022	2025	2028	2033
1 - Conwy Central	31,901	32,118	32,284	32,652
2 - Conwy East	21,245	21,359	21,511	21,706
3 - Conwy Rural/SNPA	18,520	18,785	19,008	19,317
4 - Conwy West & Creuddyn	47,212	47,493	47,749	48,112
Total	**118,878**	**119,755**	**120,552**	**121,787**
Tourist visitors (daily average)	50,300	50,300	50,300	50,300

Sources:
Experian population projections and Conwy County Borough Steam Final Trend Report for 2008 – 2020
Conwy County Borough Steam Final Trend Report for 2008 – 2021

Appendix 2 Convenience retail capacity

Table 1 - Convenience goods expenditure per person per annum (£)

Zone	2022	2025	2028	2033
1 - Conwy Central	2,243	2,230	2,227	2,229
2 - Conwy East	2,260	2,248	2,245	2,247
3 - Conwy Rural / SNPA	2,489	2,475	2,472	2,474
4 - Conwy West & Creuddyn	2,338	2,325	2,322	2,324
Tourist visitors	1,835	1,825	1,822	1,824

Sources:
Experian Local Expenditure 2020 (2020 prices)
Experian growth rates - Retail Planner Briefing Note 19 (January 2022)
Excludes Special Forms of Trading (SFT)

Table 2 - Total convenience goods expenditure (£m)

Zone	2022	2025	2028	2033
1 - Conwy Central	71.55	71.62	71.90	72.78
2 - Conwy East	48.01	48.02	48.29	48.77
3 - Conwy Rural / SNPA	46.10	46.49	46.99	47.79
4 - Conwy West & Creuddyn	110.38	110.42	110.87	111.81
Total	**276.05**	**276.55**	**278.05**	**281.16**
Tourist visitors	**92.30**	**91.79**	**91.67**	**91.75**

Source: Table 1

Table 3 - Base year 2022 convenience goods market shares by zone (%)

Location	1 - Central	2 - East	3 - Rural	4 - West/ Creuddyn	Tourist visitors
Abergele	3.5%	44.0%	4.7%	0.4%	10.0%
Colwyn Bay	44.2%	2.4%	2.9%	3.1%	10.0%
Conwy	0.0%	0.0%	0.4%	0.7%	10.0%
Craig Y Don	0.4%	0.0%	0.4%	0.0%	2.0%
Deganwy	0.0%	0.0%	0.8%	2.4%	1.0%
Kinmel Bay	0.7%	18.2%	0.0%	0.0%	15.0%
Llandudno	10.1%	3.2%	18.3%	50.2%	20.0%
Llandudno Junction	0.0%	0.0%	0.0%	2.6%	1.0%
Llandudno Jct, out of centre	14.0%	0.6%	18.2%	33.5%	5.0%
Llanfairfechan	0.0%	0.0%	0.4%	0.7%	1.0%
Llanrwst	0.0%	0.0%	31.0%	0.0%	2.0%
Old Colwyn	20.0%	1.5%	3.2%	1.1%	2.0%
Penmaenmawr	0.0%	0.0%	0.0%	1.0%	1.0%
Rhos on Sea	2.5%	0.0%	0.0%	0.0%	5.0%
Other Conwy	0.9%	0.0%	5.7%	1.9%	15.0%
Conwy total	**96.3%**	**69.9%**	**86.0%**	**97.6%**	**100.0%**
Other outside Conwy	3.7%	30.1%	14.0%	2.4%	0.0%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey July 2021 and Lichfields' analysis.

Table 4 - Base year 2022 convenience goods expenditure patterns by zone (%)

Location / Zone	1	2	3	4	Tourists	Total
Expenditure 2022	71.55	48.01	46.10	110.38	92.30	**368.35**
Abergele	2.50	21.13	2.17	0.44	9.23	35.47
Colwyn Bay	31.63	1.15	1.34	3.42	9.23	46.77
Conwy	0.00	0.00	0.18	0.77	9.23	10.19
Craig Y Don	0.29	0.00	0.18	0.00	1.85	2.32
Deganwy	0.00	0.00	0.37	2.65	0.92	3.94
Kinmel Bay	0.50	8.74	0.00	0.00	13.85	23.08
Llandudno	7.23	1.54	8.44	55.41	18.46	91.07
Llandudno Junction	0.00	0.00	0.00	2.87	0.92	3.79
Llandudno Jct, out of centre	10.02	0.29	8.39	36.98	4.62	60.29
Llanfairfechan	0.00	0.00	0.18	0.77	0.92	1.88
Llanrwst	0.00	0.00	14.29	0.00	1.85	16.14
Old Colwyn	14.31	0.72	1.48	1.21	1.85	19.57
Penmaenmawr	0.00	0.00	0.00	1.10	0.92	2.03
Rhos on Sea	1.79	0.00	0.00	0.00	4.62	6.40
Other Conwy	0.64	0.00	2.63	2.10	13.85	19.21
Conwy Total	**68.91**	**33.56**	**39.64**	**107.73**	**92.30**	**342.14**
Other outside Conwy	2.65	14.45	6.45	2.65	0.00	26.20
TOTAL	**71.55**	**48.01**	**46.10**	**110.38**	**92.30**	**368.35**

Source: Tables 2 and 3

Table 5 - Future 2025 convenience goods expenditure patterns by zone (%)

Location / Zone	1	2	3	4	Tourists	Total
Expenditure 2025	71.62	48.02	46.49	110.42	91.79	**368.34**
Abergele	2.51	21.13	2.19	0.44	9.18	35.44
Colwyn Bay	31.66	1.15	1.35	3.42	9.18	46.76
Conwy	0.00	0.00	0.19	0.77	9.18	10.14
Craig Y Don	0.29	0.00	0.19	0.00	1.84	2.31
Deganwy	0.00	0.00	0.37	2.65	0.92	3.94
Kinmel Bay	0.50	8.74	0.00	0.00	13.77	23.01
Llandudno	7.23	1.54	8.51	55.43	18.36	91.07
Llandudno Junction	0.00	0.00	0.00	2.87	0.92	3.79
Llandudno Jct, out of centre	10.03	0.29	8.46	36.99	4.59	60.36
Llanfairfechan	0.00	0.00	0.19	0.77	0.92	1.88
Llanrwst	0.00	0.00	14.41	0.00	1.84	16.25
Old Colwyn	14.32	0.72	1.49	1.21	1.84	19.58
Penmaenmawr	0.00	0.00	0.00	1.10	0.92	2.02
Rhos on Sea	1.79	0.00	0.00	0.00	4.59	6.38
Other Conwy	0.64	0.00	2.65	2.10	13.77	19.16
Conwy Total	**68.97**	**33.56**	**39.98**	**107.77**	**91.79**	**342.08**
Other outside Conwy	2.65	14.45	6.51	2.65	0.00	26.26
TOTAL	**71.62**	**48.02**	**46.49**	**110.42**	**91.79**	**368.34**

Source: Tables 2 and 3

Table 6 - Future 2028 convenience goods expenditure patterns by zone (%)

Location / Zone	1	2	3	4	Tourists	Total
Expenditure 2028	71.90	48.29	46.99	110.87	91.67	**369.72**
Abergele	2.52	21.25	2.21	0.44	9.17	35.58
Colwyn Bay	31.78	1.16	1.36	3.44	9.17	46.90
Conwy	0.00	0.00	0.19	0.78	9.17	10.13
Craig Y Don	0.29	0.00	0.19	0.00	1.83	2.31
Deganwy	0.00	0.00	0.38	2.66	0.92	3.95
Kinmel Bay	0.50	8.79	0.00	0.00	13.75	23.04
Llandudno	7.26	1.55	8.60	55.66	18.33	91.40
Llandudno Junction	0.00	0.00	0.00	2.88	0.92	3.80
Llandudno Jct, out of centre	10.07	0.29	8.55	37.14	4.58	60.63
Llanfairfechan	0.00	0.00	0.19	0.78	0.92	1.88
Llanrwst	0.00	0.00	14.57	0.00	1.83	16.40
Old Colwyn	14.38	0.72	1.50	1.22	1.83	19.66
Penmaenmawr	0.00	0.00	0.00	1.11	0.92	2.03
Rhos on Sea	1.80	0.00	0.00	0.00	4.58	6.38
Other Conwy	0.65	0.00	2.68	2.11	13.75	19.18
Conwy Total	**69.24**	**33.76**	**40.41**	**108.21**	**91.67**	**343.28**
Other outside Conwy	2.66	14.54	6.58	2.66	0.00	26.44
TOTAL	**71.90**	**48.29**	**46.99**	**110.87**	**91.67**	**369.72**

Table 7 - Future 2033 convenience goods expenditure patterns by zone (%)

Location / Zone	1	2	3	4	Tourists	Total
Expenditure 2033	72.78	48.77	47.79	111.81	91.75	**372.91**
Abergele	2.55	21.46	2.25	0.45	9.17	35.88
Colwyn Bay	32.17	1.17	1.39	3.47	9.17	47.37
Conwy	0.00	0.00	0.19	0.78	9.17	10.15
Craig Y Don	0.29	0.00	0.19	0.00	1.83	2.32
Deganwy	0.00	0.00	0.38	2.68	0.92	3.98
Kinmel Bay	0.51	8.88	0.00	0.00	13.76	23.15
Llandudno	7.35	1.56	8.75	56.13	18.35	92.14
Llandudno Junction	0.00	0.00	0.00	2.91	0.92	3.82
Llandudno Jct, out of centre	10.19	0.29	8.70	37.46	4.59	61.22
Llanfairfechan	0.00	0.00	0.19	0.78	0.92	1.89
Llanrwst	0.00	0.00	14.81	0.00	1.83	16.65
Old Colwyn	14.56	0.73	1.53	1.23	1.83	19.88
Penmaenmawr	0.00	0.00	0.00	1.12	0.92	2.04
Rhos on Sea	1.82	0.00	0.00	0.00	4.59	6.41
Other Conwy	0.66	0.00	2.72	2.12	13.76	19.27
Conwy Total	**70.09**	**34.09**	**41.10**	**109.13**	**91.75**	**346.16**
Other outside Conwy	2.69	14.68	6.69	2.68	0.00	26.75
TOTAL	**72.78**	**48.77**	**47.79**	**111.81**	**91.75**	**372.91**

Source: Tables 2 and 3

Table 8 - Convenience goods floorspace and benchmark turnover in Conwy County Borough

Zone / Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total turnover (£m)
Tesco, Abergele	2,034	90%	1,831	£14,304	£26.18
Co-op, Abergele	847	95%	805	£11,169	£8.99
Abergele other	400	100%	400	£7,000	£2.80
Abergele sub-total	**3,281**		**3,036**		**£37.97**
Heron Foods, Colwyn Bay	301	95%	286	£5,059	£1.45
Home Bargains, Colwyn Bay	558	30%	168	£5,358	£0.90
Lidl, Colwyn Bay	656	85%	558	£8,883	£4.96
Morrisons, Colwyn Bay	1,974	90%	1,777	£13,154	£23.37
Colwyn Bay other	700	100%	700	£7,000	£4.90
Colwyn Bay sub-total	**4,190**		**3,488**		**£35.57**
Spar, Conwy	149	95%	142	£8,871	£1.26
Conwy other	700	100%	700	£7,000	£4.90
Conwy sub-total	**849**		**842**		**£6.16**
Co-op, Craig Y Don	200	95%	190	£11,169	£2.12
Craig Y Don other	200	100%	200	£7,000	£1.40
Craig Y Don sub-total	**400**		**390**		**£3.52**
Co-op, Deganwy	336	95%	319	£11,169	£3.56
Deganwy sub-total	**336**		**319**		**£3.56**
Asda, Kinmel Bay	3,798	75%	2,849	£14,480	£41.25
Kinmel Bay Other	100	100%	100	£7,000	£0.70
Kinmel Bay sub-total	**3,898**		**2,949**		**£41.95**
Aldi, Llandudno	772	85%	656	£11,199	£7.35
Asda, Llandudno	5,509	70%	3,857	£14,480	£55.84
B&M, Llandudno	2,767	30%	830	£2,319	£1.93
Home Bargains, Llandudno	905	30%	272	£5,358	£1.46
Iceland, Llandudno	453	95%	430	£7,568	£3.26
M&S Foodhall, Llandudno	697	95%	662	£11,275	£7.46
Sainsbury's Local, Llandudno	307	95%	292	£12,685	£3.70
Llandudno other	1,000	100%	1,000	£7,000	£7.00
Llandudno sub-total	**12,411**		**7,999**		**£87.99**
Co-op, Llandudno Junction	183	95%	173	£11,169	£1.94
Llandudno Junction other	100	100%	100	£7,000	£0.70
Llandudno Junction sub-total	**283**		**273**		**£2.64**
Asda, Llandudno Junction	631	90%	568	£11,169	£6.34
Iceland, Llandudno Junction	375	95%	356	£7,568	£2.70
Lidl, Llandudno Junction	1,084	85%	922	£8,883	£8.19
Tesco, Llandudno Junction	2,839	85%	2,413	£14,304	£34.52
Llandudno Junction out of centre sub-total	**4,930**		**4,259**		**£51.75**
Co-op, Llanfairfechan	159	95%	151	£11,169	£1.68
Llanfairfechan other	200	100%	200	£7,000	£1.40
Llanfairfechan sub-total	**359**		**351**		**£3.08**
Co-op, Llanrwst	804	95%	764	£11,169	£8.53
Spar, Llanrwst	216	95%	205	£8,871	£1.82
Londis, Llanrwst	131	95%	124	£13,473	£1.68
Llanrwst other	100	100%	100	£7,000	£0.70
Llanrwst sub-total	**1,251**		**1,193**		**£12.73**
Co-op, Cefn Road, Old Colwyn	301	95%	286	£11,169	£3.19
Co-op, Colwyn Service Station, Old Colwyn	84	95%	79	£11,169	£0.89
Aldi, Old Colwyn	843	85%	717	£11,199	£8.03
Londis, Old Colwyn	51	95%	48	£13,473	£0.65
Old Colwyn other	400	100%	400	£7,000	£2.80
Old Colwyn sub-total	**1,679**		**1,531**		**£15.56**
Co-op, Penmaenawr	200	95%	190	£11,169	£2.12
Spar, Penmaenawr	160	95%	152	£8,871	£1.35
Penmaenmar sub-total	**360**		**342**		**£3.47**
Co-op, Colwyn Avenue, Rhos on Sea	336	95%	319	£11,169	£3.57
Co-op, Llandudno Road, Rhos on Sea	242	95%	230	£11,169	£2.56
Spar, Rhos on Sea	199	95%	189	£8,871	£1.68
Rhos on Sea other	200	100%	200	£7,000	£1.40
Rhos on Sea sub-total	**977**		**938**		**£9.21**
Total	**35,202**		**27,908**		**£315.15**

Source: *ORC Storepoint 2021 and GlobalData company average sales densities 2021*

Table 9 - Summary of convenience goods expenditure 2022 to 2033 (£M)

Area	2022	2025	2028	2033
Available expenditure				
Abergele	35.47	35.44	35.58	35.88
Colwyn Bay	46.77	46.76	46.90	47.37
Conwy	10.19	10.14	10.13	10.15
Craig Y Don	2.32	2.31	2.31	2.32
Deganwy	3.94	3.94	3.95	3.98
Kinmel Bay	23.08	23.01	23.04	23.15
Llandudno	91.07	91.07	91.40	92.14
Llandudno Junction	3.79	3.79	3.80	3.82
Llandudno Jct, out of centre	60.29	60.36	60.63	61.22
Llanfairfechan	1.88	1.88	1.88	1.89
Llanrwst	16.14	16.25	16.40	16.65
Old Colwyn	19.57	19.58	19.66	19.88
Penmaenmawr	2.03	2.02	2.03	2.04
Rhos on Sea	6.40	6.38	6.38	6.41
Other Conwy	19.21	19.16	19.18	19.27
Total	**342.14**	**342.08**	**343.28**	**346.16**
Turnover of existing facilities				
Abergele	37.97	39.66	39.82	39.82
Colwyn Bay	35.57	37.15	37.30	37.30
Conwy	6.16	6.43	6.46	6.46
Craig Y Don	3.52	3.67	3.69	3.69
Deganwy	3.56	3.72	3.74	3.74
Kinmel Bay	41.95	43.81	43.99	43.99
Llandudno	87.99	91.91	92.27	92.27
Llandudno Junction	2.64	2.75	2.77	2.77
Llandudno Jct, out of centre	51.75	54.05	54.26	54.26
Llanfairfechan	3.08	3.22	3.23	3.23
Llanrwst	12.73	13.29	13.35	13.35
Old Colwyn	15.56	16.25	16.32	16.32
Penmaenmawr	3.47	3.62	3.64	3.64
Rhos on Sea	9.21	9.62	9.65	9.65
Other Conwy	19.21	20.07	20.15	20.15
Total	**334.37**	**349.24**	**350.64**	**350.64**
Surplus/deficit expenditure £M				
Abergele	-2.51	-4.22	-4.24	-3.95
Colwyn Bay	11.20	9.61	9.60	10.06
Conwy	4.03	3.71	3.68	3.69
Craig Y Don	-1.20	-1.37	-1.38	-1.37
Deganwy	0.38	0.22	0.22	0.25
Kinmel Bay	-18.86	-20.80	-20.94	-20.84
Llandudno	3.08	-0.84	-0.88	-0.14
Llandudno Junction	1.16	1.03	1.03	1.06
Llandudno Jct, out of centre	8.54	6.31	6.37	6.96
Llanfairfechan	-1.20	-1.34	-1.35	-1.34
Llanrwst	3.41	2.95	3.05	3.30
Old Colwyn	4.01	3.33	3.34	3.56
Penmaenmawr	-1.44	-1.60	-1.61	-1.60
Rhos on Sea	-2.80	-3.24	-3.27	-3.25
Other Conwy	0.00	-0.91	-0.97	-0.88
Total	**7.78**	**-7.16**	**-7.35**	**-4.48**

Source: Tables 4 to 8 and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4a

Table 10 - Convenience goods floorspace capacity up to 2033 (cumulative)

	2022	2025	2028	2033
Turnover density new floorspace (£ per sq.m)	£12,000	£12,534	£12,584	£12,584
Floorspace projection (sq.m net)				
Abergele	-209	-337	-337	-314
Colwyn Bay	933	766	763	800
Conwy	336	296	292	294
Craig Y Don	-100	-109	-110	-109
Deganwy	32	17	17	20
Kinmel Bay	-1,572	-1,660	-1,664	-1,656
Llandudno	256	-67	-70	-11
Llandudno Junction	96	83	82	84
Llandudno Jct, out of centre	712	503	506	553
Llanfairfechan	-100	-107	-107	-107
Llanrwst	284	236	243	262
Old Colwyn	334	266	266	283
Penmaenmawr	-120	-128	-128	-127
Rhos on Sea	-234	-258	-260	-258
Other Conwy	0	-72	-77	-70
Total	**648**	**-571**	**-584**	**-356**
Floorspace Projection (sq.m gross)				
Abergele	-298	-482	-481	-448
Colwyn Bay	1,333	1,095	1,090	1,142
Conwy	480	423	417	419
Craig Y Don	-143	-156	-157	-156
Deganwy	45	25	25	28
Kinmel Bay	-2,245	-2,371	-2,378	-2,366
Llandudno	366	-96	-100	-16
Llandudno Junction	138	118	117	120
Llandudno Jct, out of centre	1,017	719	723	790
Llanfairfechan	-143	-153	-153	-152
Llanrwst	406	337	347	375
Old Colwyn	477	380	379	405
Penmaenmawr	-172	-183	-183	-182
Rhos on Sea	-334	-369	-372	-369
Other Conwy	0	-103	-110	-100
Total	**926**	**-816**	**-835**	**-509**

Source: Table 9 and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4a

Appendix 3 Comparison retail capacity

Table 1 - Comparison goods expenditure per person per annum (£)

Zone	2022	2025	2028	2033
1 - Conwy Central	2,872	3,030	3,224	3,643
2 - Conwy East	2,880	3,039	3,234	3,654
3 - Conwy Rural / SNPA	3,385	3,572	3,801	4,295
4 - Conwy West & Creuddyn	2,980	3,144	3,346	3,780
Tourist visitors	3,407	3,594	3,825	4,322

Sources:
Experian Local Expenditure 2020 (2020 prices)
Experian growth rates - Retail Planner Briefing Note 19 (January 2022)
Excludes Special Forms of Trading (SFT)

Table 2 - Total comparison goods expenditure (£m)

Zone	2022	2025	2028	2033
1 - Conwy Central	91.62	97.32	104.08	118.95
2 - Conwy East	61.19	64.91	69.57	79.31
3 - Conwy Rural / SNPA	62.69	67.10	72.25	82.97
4 - Conwy West & Creuddyn	140.69	149.32	159.77	181.86
Total	**356.19**	**378.65**	**405.67**	**463.09**
Tourist visitors	171.37	180.80	192.38	217.38

Source: Table 1

Table 3 - Base year comparison goods market shares by zone (%)

Location / Zone	1 - Central	2 - East	3 - Rural	4 - West/ Creuddyn	Tourists
Conwy					
Abergele	2.0%	10.3%	1.6%	0.7%	1.0%
Colwyn Bay	22.4%	2.8%	2.1%	3.0%	10.0%
Conwy	0.5%	0.1%	2.3%	1.1%	2.0%
Craig Y Don	0.1%	0.0%	0.2%	0.9%	1.0%
Deganwy	0.0%	0.0%	0.0%	0.1%	0.5%
Kinmel Bay	0.4%	4.6%	0.0%	0.0%	2.0%
Llandudno	55.3%	34.3%	57.6%	80.4%	75.0%
Llandudno Junction	0.2%	0.3%	0.5%	0.5%	0.5%
Llandudno Jct. out of centre	2.0%	0.1%	0.6%	2.0%	1.0%
Llanfairfechan	0.0%	0.0%	0.0%	0.1%	0.5%
Llanrwst	0.0%	0.0%	8.5%	0.0%	2.0%
Old Conway	0.3%	0.4%	0.0%	0.0%	1.0%
Penmaenmawr	0.0%	0.0%	0.2%	0.1%	0.5%
Rhos on Sea	2.7%	0.6%	0.0%	0.5%	2.0%
Other Conwy	0.5%	0.4%	1.8%	0.3%	1.0%
Conwy total	**86.4%**	**53.9%**	**75.4%**	**89.7%**	**100.0%**
Other outside Conwy	13.6%	46.1%	24.6%	10.3%	0.0%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey July 2021 and Lichfields' analysis.

Table 4 - Base year 2022 comparison goods expenditure patterns by zone (%)

Location / Zone	1	2	3	4	Tourists	Total
Expenditure 2022	91.62	61.19	62.69	140.69	171.37	**527.56**
Conwy						
Abergele	1.83	6.30	1.00	0.98	1.71	11.84
Colwyn Bay	20.52	1.71	1.32	4.22	17.14	44.91
Conwy	0.46	0.06	1.44	1.55	3.43	6.94
Craig Y Don	0.09	0.00	0.13	1.27	1.71	3.20
Deganwy	0.00	0.00	0.00	0.14	0.86	1.00
Kinmel Bay	0.37	2.81	0.00	0.00	3.43	6.61
Llandudno	50.67	20.99	36.11	113.12	128.53	349.41
Llandudno Junction	0.18	0.18	0.31	0.70	0.86	2.24
Llandudno Jct. out of centre	1.83	0.06	0.38	2.81	1.71	6.80
Llanfairfechan	0.00	0.00	0.00	0.14	0.86	1.00
Llanrwst	0.00	0.00	5.33	0.00	3.43	8.76
Old Conway	0.27	0.24	0.00	0.00	1.71	2.23
Penmaenmawr	0.00	0.00	0.13	0.14	0.86	1.12
Rhos on Sea	2.47	0.37	0.00	0.70	3.43	6.97
Other Conwy	0.46	0.24	1.13	0.42	1.71	3.97
Conwy Total	**79.16**	**32.98**	**47.27**	**126.20**	**171.37**	**456.98**
Other outside Conwy	12.46	28.21	15.42	14.49	0.00	70.58
TOTAL	**91.62**	**61.19**	**62.69**	**140.69**	**171.37**	**527.56**

Source: Tables 2 and 3

Table 5 - Future 2025 comparison goods expenditure patterns by zone (%)

Location / Zone	1	2	3	4	Tourists	Total
Expenditure 2025	97.32	64.91	67.10	149.32	180.80	**559.45**
Conwy						
Abergele	1.95	6.69	1.07	1.05	1.81	12.56
Colwyn Bay	21.80	1.82	1.41	4.48	18.08	47.59
Conwy	0.49	0.06	1.54	1.64	3.62	7.35
Craig Y Don	0.10	0.00	0.13	1.34	1.81	3.38
Deganwy	0.00	0.00	0.00	0.15	0.90	1.05
Kinmel Bay	0.39	2.99	0.00	0.00	3.62	6.99
Llandudno	53.82	22.26	38.65	120.05	135.60	370.38
Llandudno Junction	0.19	0.19	0.34	0.75	0.90	2.38
Llandudno Jct. out of centre	1.95	0.06	0.40	2.99	1.81	7.21
Llanfairfechan	0.00	0.00	0.00	0.15	0.90	1.05
Llanrwst	0.00	0.00	5.70	0.00	3.62	9.32
Old Conway	0.29	0.26	0.00	0.00	1.81	2.36
Penmaenmawr	0.00	0.00	0.13	0.15	0.90	1.19
Rhos on Sea	2.63	0.39	0.00	0.75	3.62	7.38
Other Conwy	0.49	0.26	1.21	0.45	1.81	4.21
Conwy Total	**84.08**	**34.99**	**50.59**	**133.94**	**180.80**	**484.40**
Other outside Conwy	13.24	29.92	16.51	15.38	0.00	75.05
TOTAL	**97.32**	**64.91**	**67.10**	**149.32**	**180.80**	**559.45**

Source: Tables 2 and 3

Table 6 - Future 2028 comparison goods expenditure patterns by zone (%)

Location / Zone	1	2	3	4	Tourists	Total
Expenditure 2028	104.08	69.57	72.25	159.77	192.38	**598.04**
Conwy						
Abergele	2.08	7.17	1.16	1.12	1.92	13.45
Colwyn Bay	23.31	1.95	1.52	4.79	19.24	50.81
Conwy	0.52	0.07	1.66	1.76	3.85	7.86
Craig Y Don	0.10	0.00	0.14	1.44	1.92	3.61
Deganwy	0.00	0.00	0.00	0.16	0.96	1.12
Kinmel Bay	0.42	3.20	0.00	0.00	3.85	7.46
Llandudno	57.56	23.86	41.62	128.45	144.28	395.77
Llandudno Junction	0.21	0.21	0.36	0.80	0.96	2.54
Llandudno Jct. out of centre	2.08	0.07	0.43	3.20	1.92	7.70
Llanfairfechan	0.00	0.00	0.00	0.16	0.96	1.12
Llanrwst	0.00	0.00	6.14	0.00	3.85	9.99
Old Conway	0.31	0.28	0.00	0.00	1.92	2.51
Penmaenmawr	0.00	0.00	0.14	0.16	0.96	1.27
Rhos on Sea	2.81	0.42	0.00	0.80	3.85	7.87
Other Conwy	0.52	0.28	1.30	0.48	1.92	4.50
Conwy Total	**89.93**	**37.50**	**54.48**	**143.31**	**192.38**	**517.59**
Other outside Conwy	14.16	32.07	17.77	16.46	0.00	80.46
TOTAL	**104.08**	**69.57**	**72.25**	**159.77**	**192.38**	**598.04**

Source: Tables 2 and 3

Table 7 - Future 2033 comparison goods expenditure patterns by zone (%)

Location / Zone	1	2	3	4	Tourists	Total
Expenditure 2033	118.95	79.31	82.97	181.86	217.38	**680.47**
Conwy						
Abergele	2.38	8.17	1.33	1.27	2.17	15.32
Colwyn Bay	26.65	2.22	1.74	5.46	21.74	57.80
Conwy	0.59	0.08	1.91	2.00	4.35	8.93
Craig Y Don	0.12	0.00	0.17	1.64	2.17	4.10
Deganwy	0.00	0.00	0.00	0.18	1.09	1.27
Kinmel Bay	0.48	3.65	0.00	0.00	4.35	8.47
Llandudno	65.78	27.20	47.79	146.22	163.03	450.02
Llandudno Junction	0.24	0.24	0.41	0.91	1.09	2.89
Llandudno Jct. out of centre	2.38	0.08	0.50	3.64	2.17	8.77
Llanfairfechan	0.00	0.00	0.00	0.18	1.09	1.27
Llanrwst	0.00	0.00	7.05	0.00	4.35	11.40
Old Conway	0.36	0.32	0.00	0.00	2.17	2.85
Penmaenmawr	0.00	0.00	0.17	0.18	1.09	1.43
Rhos on Sea	3.21	0.48	0.00	0.91	4.35	8.94
Other Conwy	0.59	0.32	1.49	0.55	2.17	5.12
Conwy Total	**102.77**	**42.75**	**62.56**	**163.13**	**217.38**	**588.59**
Other outside Conwy	16.18	36.56	20.41	18.73	0.00	91.88
TOTAL	**118.95**	**79.31**	**82.97**	**181.86**	**217.38**	**680.47**

Source: Tables 2 and 3

Table 8 - Summary of comparison goods expenditure 2022 to 2033 (£M)

Area	2022	2025	2028	2033
Available expenditure				
Abergele	11.84	12.56	13.45	15.32
Colwyn Bay	44.91	47.59	50.81	57.80
Conwy	6.94	7.35	7.86	8.93
Craig Y Don	3.20	3.38	3.61	4.10
Deganwy	1.00	1.05	1.12	1.27
Kinmel Bay	6.61	6.99	7.46	8.47
Llandudno	349.41	370.38	395.77	450.02
Llandudno Junction	2.24	2.38	2.54	2.89
Llandudno Jct. out of centre	6.80	7.21	7.70	8.77
Llanfairfechan	1.00	1.05	1.12	1.27
Llanrwst	8.76	9.32	9.99	11.40
Old Conway	2.23	2.36	2.51	2.85
Penmaenmawr	1.12	1.19	1.27	1.43
Rhos on Sea	6.97	7.38	7.87	8.94
Other Conwy	3.97	4.21	4.50	5.12
Total	**456.98**	**484.40**	**517.59**	**588.59**
Turnover of existing facilities				
Abergele	11.84	13.27	14.16	16.04
Colwyn Bay	44.91	50.33	53.73	60.85
Conwy	6.94	7.77	8.30	9.40
Craig Y Don	3.20	3.58	3.82	4.33
Deganwy	1.00	1.12	1.19	1.35
Kinmel Bay	6.61	7.41	7.91	8.95
Llandudno	349.41	391.61	418.03	473.42
Llandudno Junction	2.24	2.51	2.68	3.04
Llandudno Jct. out of centre	6.80	7.62	8.13	9.21
Llanfairfechan	1.00	1.12	1.19	1.35
Llanrwst	8.76	9.81	10.48	11.86
Old Conway	2.23	2.50	2.67	3.03
Penmaenmawr	1.12	1.26	1.34	1.52
Rhos on Sea	6.97	7.81	8.34	9.45
Other Conwy	3.97	4.45	4.75	5.38
Total	**456.98**	**512.17**	**546.73**	**619.17**
Surplus/deficit expenditure £M				
Abergele	0.00	-0.71	-0.72	-0.71
Colwyn Bay	0.00	-2.75	-2.92	-3.05
Conwy	0.00	-0.42	-0.44	-0.47
Craig Y Don	0.00	-0.20	-0.21	-0.24
Deganwy	0.00	-0.06	-0.07	-0.08
Kinmel Bay	0.00	-0.42	-0.44	-0.48
Llandudno	0.00	-21.23	-22.26	-23.39
Llandudno Junction	0.00	-0.14	-0.14	-0.15
Llandudno Jct. out of centre	0.00	-0.41	-0.43	-0.44
Llanfairfechan	0.00	-0.06	-0.07	-0.08
Llanrwst	0.00	-0.49	-0.49	-0.46
Old Conway	0.00	-0.14	-0.16	-0.18
Penmaenmawr	0.00	-0.07	-0.08	-0.09
Rhos on Sea	0.00	-0.43	-0.47	-0.50
Other Conwy	0.00	-0.24	-0.24	-0.25
Total	**0.00**	**-27.77**	**-29.14**	**-30.58**

Source: Tables 4 to 8 and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4b

Table 9 - Comparison goods floorspace capacity up to 2033 (cumulative)

	2022	2025	2028	2033
Turnover density new floorspace (£ per sq.m)	£6,000	£6,725	£7,178	£8,130
Floorspace projection (sq.m net)				
Abergele	0	-105	-100	-88
Colwyn Bay	0	-409	-407	-375
Conwy	0	-63	-62	-58
Craig Y Don	0	-30	-30	-29
Deganwy	0	-10	-10	-10
Kinmel Bay	0	-62	-62	-59
Llandudno	0	-3,157	-3,101	-2,878
Llandudno Junction	0	-20	-20	-18
Llandudno Jct. out of centre	0	-61	-60	-54
Llanfairfechan	0	-10	-10	-10
Llanrwst	0	-73	-68	-57
Old Conway	0	-21	-22	-22
Penmaenmawr	0	-11	-11	-11
Rhos on Sea	0	-65	-65	-62
Other Conwy	0	-35	-34	-31
Total	**0**	**-4,130**	**-4,059**	**-3,762**
Floorspace Projection (sq.m gross)				
Abergele	0	-131	-125	-110
Colwyn Bay	0	-511	-508	-469
Conwy	0	-78	-77	-72
Craig Y Don	0	-37	-37	-36
Deganwy	0	-12	-13	-13
Kinmel Bay	0	-77	-77	-74
Llandudno	0	-3,946	-3,876	-3,597
Llandudno Junction	0	-25	-25	-23
Llandudno Jct. out of centre	0	-76	-75	-68
Llanfairfechan	0	-12	-13	-13
Llanrwst	0	-92	-85	-71
Old Conway	0	-27	-27	-27
Penmaenmawr	0	-13	-13	-13
Rhos on Sea	0	-81	-81	-77
Other Conwy	0	-44	-42	-38
Total	**0**	**-5,163**	**-5,074**	**-4,702**

Source: Table 8 and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4b

Appendix 4 Food/beverage capacity

Table 1 - Food/beverage expenditure per person per annum (£)

Zone	2022	2025	2028	2033
1 - Conwy Central	1,244	1,284	1,327	1,387
2 - Conwy East	1,239	1,279	1,322	1,382
3 - Conwy Rural / SNPA	1,283	1,324	1,369	1,431
4 - Conwy West & Creuddyn	1,304	1,346	1,391	1,455
Tourist visitors	3,351	3,459	3,575	3,736

Sources:
Experian Local Expenditure 2020 (2020 prices)
Experian growth rates - Retail Planner Breifing Note 19 (January 2022)

Table 2 - Total food/beverage expenditure (£m)

Zone	2022	2025	2028	2033
1 - Conwy Central	39.68	41.24	42.84	45.29
2 - Conwy East	26.32	27.32	28.44	30.00
3 - Conwy Rural / SNPA	23.76	24.87	26.02	27.64
4 - Conwy West & Creuddyn	61.56	63.93	66.42	70.00
Total	**151.33**	**157.35**	**163.72**	**172.93**
Tourist visitors	168.56	173.98	179.80	187.93

Source: Table 1

Table 3 - Base year food/beverage market shares by zone (%)

Location / Zone	1 - Central	2 - East	3 - Rural	4 - West/ Creuddyn	Tourists
Conwy					
Abergele	1.7%	26.1%	3.5%	0.0%	5.0%
Colwyn Bay	36.6%	6.2%	2.1%	4.9%	15.0%
Conwy	9.5%	2.6%	9.1%	20.5%	18.0%
Craig Y Don	2.7%	0.0%	0.0%	1.2%	2.0%
Deganwy	0.0%	0.7%	0.8%	5.0%	1.0%
Kinmel Bay	0.0%	5.1%	0.0%	0.0%	2.0%
Llandudno	13.0%	11.8%	12.2%	28.5%	30.0%
Llandudno Junction	1.4%	0.6%	3.2%	15.4%	1.0%
Llandudno Jct. out of centre	0.0%	0.0%	0.0%	0.0%	0.0%
Llanfairfechan	0.0%	0.6%	0.0%	0.6%	0.5%
Llanrwst	0.0%	0.9%	25.1%	0.0%	5.0%
Old Conway	7.4%	1.6%	0.3%	0.6%	5.0%
Penmaenmawr	0.0%	0.6%	0.0%	1.5%	0.5%
Rhos on Sea	10.8%	3.6%	0.3%	5.1%	5.0%
Other Conwy	4.7%	3.9%	20.1%	10.2%	10.0%
Conwy total	**87.8%**	**64.3%**	**76.7%**	**93.5%**	**100.0%**
Other outside Conwy	12.2%	35.7%	23.3%	6.5%	0.0%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey July 2021 and Lichfields' analysis.

Table 4 - Base year 2022 food/beverage expenditure patterns by zone (£M)

Location / Zone	1	2	3	4	Tourists	Total
Expenditure 2022	39.68	26.32	23.76	61.56	168.56	**319.89**
Conwy						
Abergele	0.67	6.87	0.83	0.00	8.43	16.80
Colwyn Bay	14.52	1.63	0.50	3.02	25.28	44.96
Conwy	3.77	0.68	2.16	12.62	30.34	49.58
Craig Y Don	1.07	0.00	0.00	0.74	3.37	5.18
Deganwy	0.00	0.18	0.19	3.08	1.69	5.14
Kinmel Bay	0.00	1.34	0.00	0.00	3.37	4.71
Llandudno	5.16	3.11	2.90	17.55	50.57	79.28
Llandudno Junction	0.56	0.16	0.76	9.48	1.69	12.64
Llandudno Jct. out of centre	0.00	0.00	0.00	0.00	0.00	0.00
Llanfairfechan	0.00	0.16	0.00	0.37	0.84	1.37
Llanrwst	0.00	0.24	5.96	0.00	8.43	14.63
Old Conway	2.94	0.42	0.07	0.37	8.43	12.23
Penmaenmawr	0.00	0.16	0.00	0.92	0.84	1.92
Rhos on Sea	4.29	0.95	0.07	3.14	8.43	16.87
Other Conwy	1.87	1.03	4.78	6.28	16.86	30.80
Conwy Total	**34.84**	**16.93**	**18.22**	**57.56**	**168.56**	**296.11**
Other outside Conwy	4.84	9.40	5.54	4.00	0.00	23.78
TOTAL	**39.68**	**26.32**	**23.76**	**61.56**	**168.56**	**319.89**

Source: Tables 2 and 3

Table 5 - Future 2025 food/beverage expenditure patterns by zone (£M)

Location / Zone	1	2	3	4	Tourists	Total
Expenditure 2025	41.24	27.32	24.87	63.93	173.98	**331.33**
Conwy						
Abergele	0.70	7.13	0.87	0.00	8.70	17.40
Colwyn Bay	15.09	1.69	0.52	3.13	26.10	46.54
Conwy	3.92	0.71	2.26	13.10	31.32	51.31
Craig Y Don	1.11	0.00	0.00	0.77	3.48	5.36
Deganwy	0.00	0.19	0.20	3.20	1.74	5.33
Kinmel Bay	0.00	1.39	0.00	0.00	3.48	4.87
Llandudno	5.36	3.22	3.03	18.22	52.19	82.03
Llandudno Junction	0.58	0.16	0.80	9.84	1.74	13.12
Llandudno Jct. out of centre	0.00	0.00	0.00	0.00	0.00	0.00
Llanfairfechan	0.00	0.16	0.00	0.38	0.87	1.42
Llanrwst	0.00	0.25	6.24	0.00	8.70	15.19
Old Conway	3.05	0.44	0.07	0.38	8.70	12.65
Penmaenmawr	0.00	0.16	0.00	0.96	0.87	1.99
Rhos on Sea	4.45	0.98	0.07	3.26	8.70	17.47
Other Conwy	1.94	1.07	5.00	6.52	17.40	31.92
Conwy Total	**36.21**	**17.57**	**19.08**	**59.77**	**173.98**	**306.60**
Other outside Conwy	5.03	9.75	5.80	4.16	0.00	24.73
TOTAL	**41.24**	**27.32**	**24.87**	**63.93**	**173.98**	**331.33**

Source: Tables 2 and 3

Table 6 - Future 2028 food/beverage expenditure patterns by zone (£M)

Location / Zone	1	2	3	4	Tourists	Total
Expenditure 2028	42.84	28.44	26.02	66.42	179.80	**343.52**
Conwy						
Abergele	0.73	7.42	0.91	0.00	8.99	18.05
Colwyn Bay	15.68	1.76	0.55	3.25	26.97	48.21
Conwy	4.07	0.74	2.37	13.62	32.36	53.16
Craig Y Don	1.16	0.00	0.00	0.80	3.60	5.55
Deganwy	0.00	0.20	0.21	3.32	1.80	5.53
Kinmel Bay	0.00	1.45	0.00	0.00	3.60	5.05
Llandudno	5.57	3.36	3.17	18.93	53.94	84.97
Llandudno Junction	0.60	0.17	0.83	10.23	1.80	13.63
Llandudno Jct. out of centre	0.00	0.00	0.00	0.00	0.00	0.00
Llanfairfechan	0.00	0.17	0.00	0.40	0.90	1.47
Llanrwst	0.00	0.26	6.53	0.00	8.99	15.78
Old Conway	3.17	0.46	0.08	0.40	8.99	13.09
Penmaenmawr	0.00	0.17	0.00	1.00	0.90	2.07
Rhos on Sea	4.63	1.02	0.08	3.39	8.99	18.11
Other Conwy	2.01	1.11	5.23	6.77	17.98	33.11
Conwy Total	**37.61**	**18.29**	**19.96**	**62.10**	**179.80**	**317.76**
Other outside Conwy	5.23	10.15	6.06	4.32	0.00	25.76
TOTAL	**42.84**	**28.44**	**26.02**	**66.42**	**179.80**	**343.52**

Source: Tables 2 and 3

Table 7 - Future 2033 food/beverage expenditure patterns by zone (£M)

Location / Zone	1	2	3	4	Tourists	Total
Expenditure 2033	45.29	30.00	27.64	70.00	187.93	**360.86**
Conwy						
Abergele	0.77	7.83	0.97	0.00	9.40	18.96
Colwyn Bay	16.58	1.86	0.58	3.43	28.19	50.64
Conwy	4.30	0.78	2.52	14.35	33.83	55.78
Craig Y Don	1.22	0.00	0.00	0.84	3.76	5.82
Deganwy	0.00	0.21	0.22	3.50	1.88	5.81
Kinmel Bay	0.00	1.53	0.00	0.00	3.76	5.29
Llandudno	5.89	3.54	3.37	19.95	56.38	89.13
Llandudno Junction	0.63	0.18	0.88	10.78	1.88	14.36
Llandudno Jct. out of centre	0.00	0.00	0.00	0.00	0.00	0.00
Llanfairfechan	0.00	0.18	0.00	0.42	0.94	1.54
Llanrwst	0.00	0.27	6.94	0.00	9.40	16.60
Old Conway	3.35	0.48	0.08	0.42	9.40	13.73
Penmaenmawr	0.00	0.18	0.00	1.05	0.94	2.17
Rhos on Sea	4.89	1.08	0.08	3.57	9.40	19.02
Other Conwy	2.13	1.17	5.56	7.14	18.79	34.79
Conwy Total	**39.76**	**19.29**	**21.20**	**65.45**	**187.93**	**333.64**
Other outside Conwy	5.53	10.71	6.44	4.55	0.00	27.23
TOTAL	**45.29**	**30.00**	**27.64**	**70.00**	**187.93**	**360.86**

Source: Tables 2 and 3

Table 8 - Summary of food/beverage expenditure 2022 to 2033 (£M)

Area	2022	2025	2028	2033
Available expenditure				
Abergele	16.80	17.40	18.05	18.96
Colwyn Bay	44.96	46.54	48.21	50.64
Conwy	49.58	51.31	53.16	55.78
Craig Y Don	5.18	5.36	5.55	5.82
Deganwy	5.14	5.33	5.53	5.81
Kinmel Bay	4.71	4.87	5.05	5.29
Llandudno	79.28	82.03	84.97	89.13
Llandudno Junction	12.64	13.12	13.63	14.36
Llandudno Jct. out of centre	0.00	0.00	0.00	0.00
Llanfairfechan	1.37	1.42	1.47	1.54
Llanrwst	14.63	15.19	15.78	16.60
Old Conway	12.23	12.65	13.09	13.73
Penmaenmawr	1.92	1.99	2.07	2.17
Rhos on Sea	16.87	17.47	18.11	19.02
Other Conwy	30.80	31.92	33.11	34.79
Total	**296.11**	**306.60**	**317.76**	**333.64**
Turnover of existing facilities				
Abergele	16.80	17.31	17.57	18.02
Colwyn Bay	44.96	46.32	47.02	48.20
Conwy	49.58	51.08	51.85	53.16
Craig Y Don	5.18	5.34	5.42	5.56
Deganwy	5.14	5.29	5.37	5.51
Kinmel Bay	4.71	4.86	4.93	5.05
Llandudno	79.28	81.68	82.91	85.00
Llandudno Junction	12.64	13.02	13.22	13.55
Llandudno Jct. out of centre	0.00	0.00	0.00	0.00
Llanfairfechan	1.37	1.41	1.43	1.47
Llanrwst	14.63	15.07	15.30	15.69
Old Conway	12.23	12.60	12.79	13.11
Penmaenmawr	1.92	1.98	2.01	2.06
Rhos on Sea	16.87	17.38	17.65	18.09
Other Conwy	30.80	31.74	32.21	33.03
Total	**296.11**	**305.08**	**309.68**	**317.50**
Surplus/deficit expenditure £M				
Abergele	0.00	0.09	0.48	0.95
Colwyn Bay	0.00	0.22	1.20	2.43
Conwy	0.00	0.23	1.31	2.62
Craig Y Don	0.00	0.02	0.13	0.27
Deganwy	0.00	0.03	0.15	0.30
Kinmel Bay	0.00	0.02	0.12	0.23
Llandudno	0.00	0.35	2.06	4.13
Llandudno Junction	0.00	0.10	0.41	0.80
Llandudno Jct. out of centre	0.00	0.00	0.00	0.00
Llanfairfechan	0.00	0.01	0.04	0.07
Llanrwst	0.00	0.12	0.48	0.92
Old Conway	0.00	0.05	0.31	0.62
Penmaenmawr	0.00	0.01	0.05	0.11
Rhos on Sea	0.00	0.09	0.46	0.93
Other Conwy	0.00	0.18	0.89	1.76
Total	**0.00**	**1.51**	**8.08**	**16.13**

Source: Tables 4 to 7

Table 9 - Food/beverage floorspace capacity up to 2033 (cumulative)

	2022	2025	2028	2033
Turnover density new floorspace (£ per sq.m)	£5,000	£5,152	£5,229	£5,361
Floorspace projection (sq.m gross)				
Abergele	0	17	91	176
Colwyn Bay	0	43	229	454
Conwy	0	45	250	488
Craig Y Don	0	4	25	50
Deganwy	0	6	29	56
Kinmel Bay	0	3	22	44
Llandudno	0	68	394	770
Llandudno Junction	0	19	78	150
Llandudno Jct. out of centre	0	0	0	0
Llanfairfechan	0	1	7	13
Llanrwst	0	22	91	171
Old Conway	0	10	58	116
Penmaenmawr	0	2	10	20
Rhos on Sea	0	17	88	173
Other Conwy	0	36	171	328
Total	**0**	**293**	**1,545**	**3,009**

Source: Table 8

Appendix 5 : Business Survey Overview

5.1 Lichfields produced a business survey which was issued by the Council to their business database in February 2022 and was live until May 2022. The survey received a total of 98 responses. This appendix provides high-level analysis of the survey responses. Findings specific to each of the town centres are included in the relevant section of the main report. It should be noted that not all respondents answered all questions.

5.2 31 or 33.7% of responses came from businesses in Llandudno, followed by 14 or 15.2% from Colwyn Bay, 9 or 9.8% from Abergele, 9 or 9.8% from Llanrwst and 8 or 8.7% from Conwy. Other locations not listed included Betws-y-Coed, Pensarn, Pont y Pant and Towyn.

Where is your business located? (please choose nearest local centre)			
Answer Choice		**Response Percent**	**Response Total**
1	Llandudno	33.7%	31
2	Colwyn Bay	15.2%	14
3	Abergele	9.8%	9
6	Llanrwst	9.8%	9
4	Conwy	8.7%	8
15	Elsewhere (please specify)	5.4%	5
11	Rhos-on-Sea	4.3%	4
5	Llandudno Junction	3.3%	3
7	Llanfairfechan	2.2%	2
12	Old Colwyn	2.2%	2
14	Mochdre	2.2%	2
8	Penmaenmawr	1.1%	1
9	Deganwy	1.1%	1
10	Craig-Y-Don	1.1%	1
13	Kinmel Bay	0.0%	0
		answered	**92**
		skipped	**6**

21.51 31 or 34.1% of responses were from hospitality and tourism businesses, followed by 29 or 31.9% retail/wholesale businesses. Most of the respondents which picked 'other' were in health or community uses.

Which business category is most applicable to your firm?			
Answer Choice		**Response Percent**	**Response Total**
1	General Manufacturing	1.1%	1
2	Advanced Manufacturing	0.0%	0
3	Retail/Wholesale	31.9%	29
4	Creative/ Digital/ New Media	4.4%	4
5	ICT Consultancy / Software Development	3.3%	3
6	Construction	2.2%	2

7	Hospitality and Tourism	34.1%	31
8	Logistics/Distribution	1.1%	1
9	Legal and Accounting Services	0.0%	0
10	Financial Services including Insurance	0.0%	0
11	Other Professional Services (consultancy, advertising & market research)	4.4%	4
12	Scientific Research & Development	0.0%	0
13	Offshore Activities	0.0%	0
14	Other (please specify):	17.6%	16
		answered	**91**
		skipped	**7**

21.52 74 or 85.1% of responses were from businesses with 9 employees or fewer. There were 8 (9.2%) responses from businesses with 10 to 49 employees, 5 (5.7%) from businesses with 50 to 249 employees and none larger than this. The largest business to respond was a childcare company with 110 staff. There was also an IT consultancy 105 staff.

Company size	**#**	**%**
Micro (0 to 9)	74	85.1%
Small (10 to 49)	8	9.2%
Medium (50 to 249)	5	5.7%
Large (250+)	0	0.0%
Total	87	100.0%

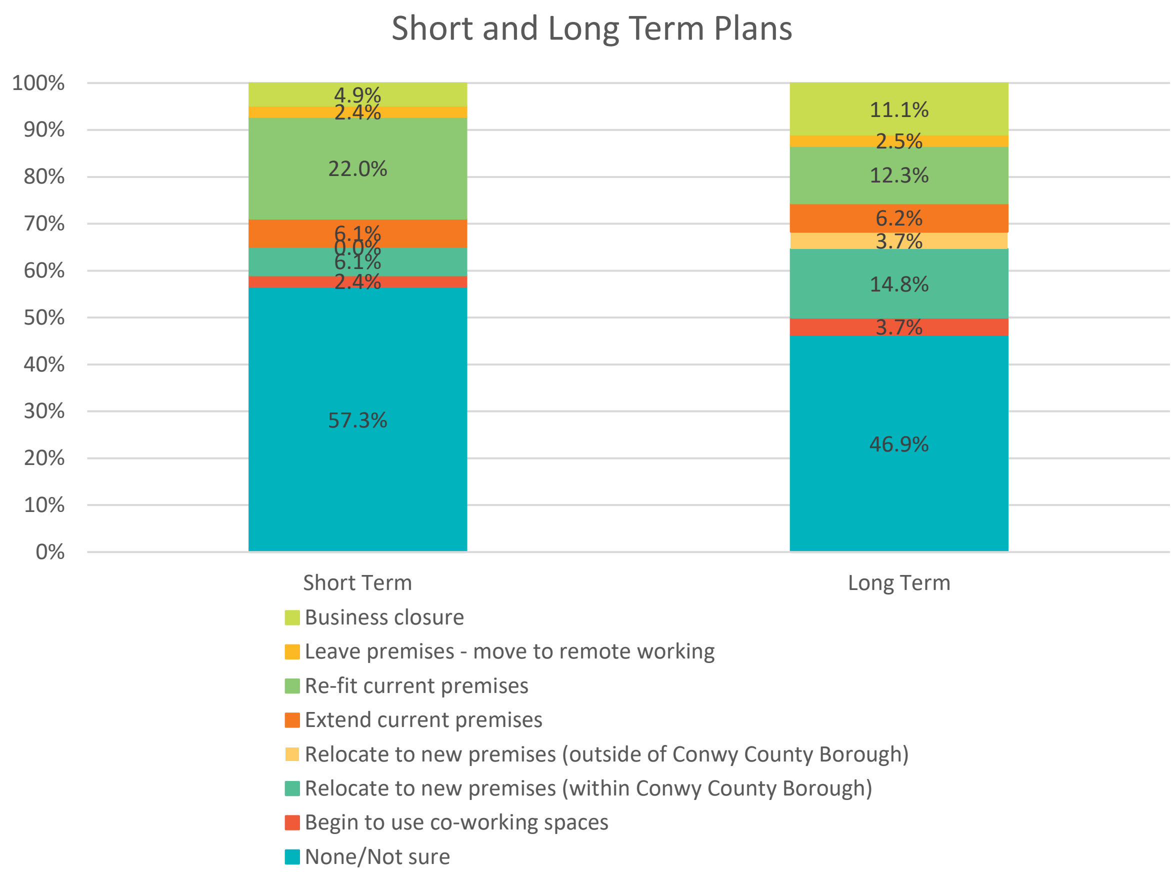
21.53 85 (94.4%) respondents had permanent business premises, whilst 5 (5.6%) work remotely. Respondents were relatively well established within their premises, with 43 (49.4%) having been in their current premises for more than ten years, and a further 23 (26.4%) having been in their premises for between five and ten years. Three respondents (3.4%) had been in their current premises less than a year.

21.54 35 respondents (40.2%) owned their current premises, whilst 52 (59.8%) leased their premises. 15 of these were on lease terms of 10+ years and another 7 on 5+ years. 16 had terms of two to five years, 8 on one to two years, and 5 on terms of less than one year.

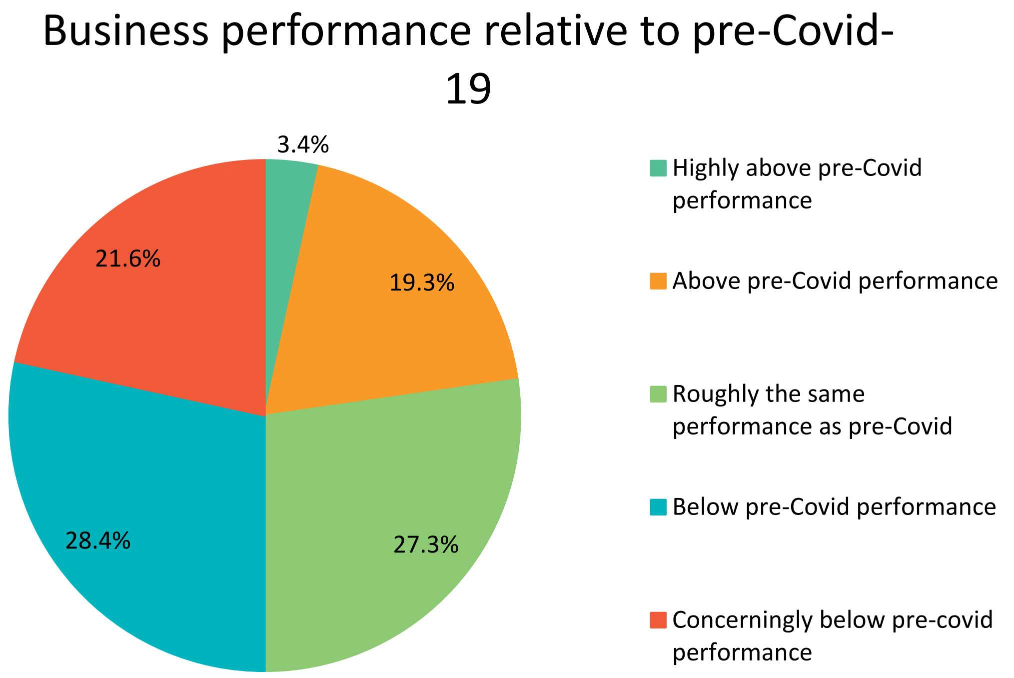
21.55 Nine respondents (10.0%) had employees which make use of shared office/drop in space, with a further four (4.4%) who don't but would be keen to explore the possibilities for utilising co-working space. This means that 77 or 85.6% of respondents do not utilise shared workspaces and have no intention of exploring this in the future.

21.56 Respondents were asked about their short- and long-term plans for their premises. In the short-term, 47 businesses or 57.3% of respondents were not sure or had no plans. 18 businesses (22.0%) had plans to re-fit their current premises, 5 (6.1%) had plans to extend their current premises, 5 (6.1%) plan to relocate within Conwy (none plan to relocate out of Conwy, 4 (4.9%) plan to close the business and 2 (2.4%) plan to begin using shared working spaces.

21.57 In the long term the pattern of responses was similar, however nine business (11.1%) were planning for business closure, 12 (14.8%) planned t relocate within Conwy and 3 (3.7%) planned to relocate outside of Conwy.

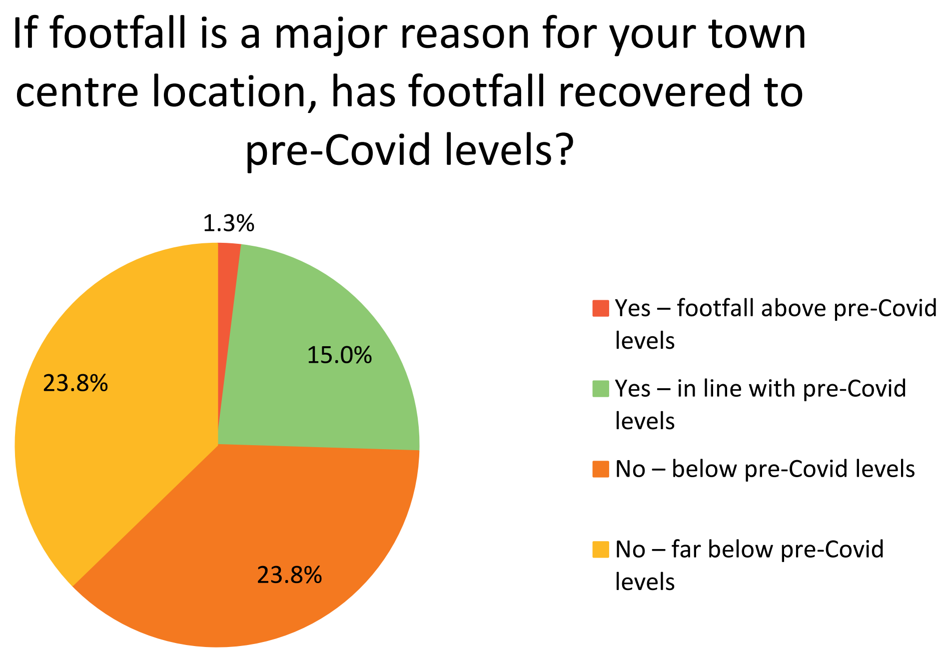


21.58 In terms of business pref9ormance and recovery following the Covid-19 pandemic and lockdown periods, a total of 45 or half of respondents reported that performance was below or concerningly below pr-Covid-19 levels. 24 businesses (27.3%) stated that performance was roughly the same, whilst 20 businesses (22.7%) stated that performance was above pre-Covid-19 levels.



21.59 Amongst respondents in the hospitality and tourism sector, 18 or 64.3% reported that business performance was below or concerningly below pre-Covid levels. In retail, 13 businesses or 52.0 reported that business performance was below or concerningly below pre-Covid levels.

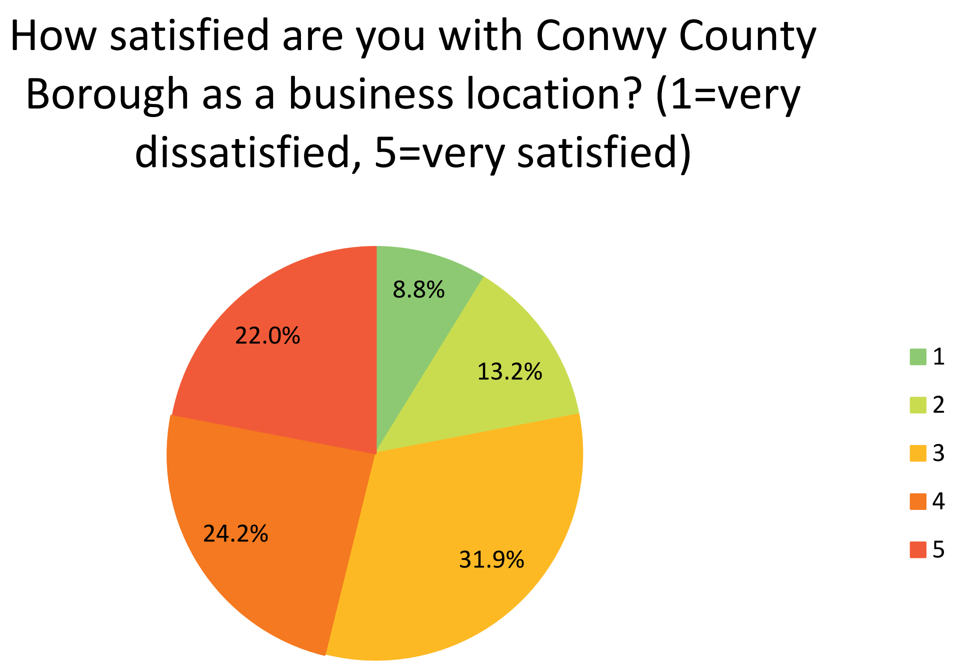
21.60 On a similar note, of the 51 respondents for whom footfall is a major reason for their location, 38 or 47.5% stated that footfall was below or far below pre-Covid levels. Only 1 respondent indicated that footfall was higher than pre-Covid levels.



21.61 In response to changes or planned changes to the business following the easing of Covid-19 restrictions, 33 (36.3%) respondents stated no changes. Popular responses included diversification of the business (26.4%), new capital investment (19.8%) , upskilling/retraining of the workforce (18.7%) and employing more staff (17.6%). 10 businesses stated they would enable increased home/remote working, whilst 8 businesses (8.8%) have or plan to reduce the number of employees. Of the 42 respondents with staff who regularly work from home, 38 or 90.5% stated that their staff mostly lived within Coney County Borough.

Which of the following changes (if any) have you made or plan to make to your business now Covid-19 restrictions have eased? (Tick all that apply)			
Answer Choice		**Response Percent**	**Response Total**
1	More home/remote working by me/employees	11.0%	10
2	Reduce core number of employees	8.8%	8
3	Increase number of employees	17.6%	16
4	New capital investment	19.8%	18
5	Diversification of the business	26.4%	24
6	Shift towards a more local supply-chain	6.6%	6
7	Upskilling/retraining the workforce	18.7%	17
8	Allowing greater flexibility in staff working patterns	9.9%	9
9	None	36.3%	33
10	Other (please specify):	13.2%	12
		answered	**91**
		skipped	**7**

21.62 Businesses were asked how satisfied they are with Conwy County Borough as a business location. Whilst 29 of the 91 respondents to the question (31.9%) gave a rating of three indicating no strong preference, 42 or 46.2% gave a rating of four or five with just over a fifth of respondents (22.0%) giving a five out of five. 20 respondents (22.0%) were dissatisfied giving a rating of one or two.


How satisfied are you with Conwy County Borough as a business location? (1=very dissatisfied, 5=very satisfied)
8.8%
13.2%
31.9%
24.2%
22.0%
1
2
3
4
5