



# Replacement Local Development Plan 2018-2033

## Background Paper

August 2018

BP 25: Retail Centre Health Checks

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## 1 Introduction

- 1.1 This is one of a series of Background Papers accompanying the Replacement Local Development Plan (RLDP). When the Council publishes its Preferred Strategy and Deposit Plan, it must also explain how the policy has been formulated based on the evidence base available to the Council at the time. This Background Paper looks at the retail health of town centres across the Conwy County Borough area (excluding Snowdonia National Park).
- 1.2 This document contains data and survey work which are indicators that show the retail health of the Conwy Local Development Plan (LDP) Primary Shopping Areas and Shopping Zones in Conwy County Borough.

## 2 National planning policy and guidance

- 2.1 Para 10.2.1 of Planning Policy Wales (PPW) states that: “Local planning authorities should develop through their development plans a clear strategy and policies for retail development which seek to achieve vibrant, attractive and viable retail and commercial centres. They should set out a framework for the future of retail and commercial centres in their area which promotes a successful retailing sector supporting existing communities”. Para 10.1.2 sets the national objectives for retail and commercial centres:
  - 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.
- 2.2 Retail A1 uses should continue to underpin retail and commercial centres, but local policies should encourage a diversity of uses in centres, including financial and professional services (A2), food and drink (A3), offices (B1), hotels (C1), educational and other non-residential establishments (D1), leisure (D2) and certain other sui generis uses such as launderettes and theatres. Mixed use development should be encouraged. Leisure uses are also appropriate if amenity is appropriately safeguarded.
- 2.3 Para 10.3.1 states that development plans should: “monitor the health of retail centres to assess the effectiveness of policies”.
- 2.4 PPW: Edition 10 has recently been out to public consultation (closed May 2018), which will deliver the Well-being of Future Generations Act. PPW outlines that policies will enable sustainable access and transportation to facilities, including retail. Policies should capitalise on existing retail and commercial centres as hubs of social and economic activity, with a diverse range of services, which promotes and protects the Welsh language.
- 2.5 Technical Advice Note 4: Retailing and Town Centres (TAN4) states in para 13.2 that: “The use of regular health checks provides a means of monitoring changes over time, and provides the local planning authority with a good understanding of the resilience of

its retail and commercial centres to change, and to gauge the significance of the impact of new developments”.

- 2.6 TAN4 also recommends indicators for measuring vitality, attractiveness and viability of town centres (para 13.3). Where the data is available, these have been included. TAN4 adds that local indicators may also be used.
- 2.7 There are definitions for the terms used in Appendix 1.

### **3 Indicators**

#### **3.1 Use classes**

- 3.1.1 Use classes helps show the range of offer for retail and other uses in the town centre. A wide variety of shops and services is important for a town centre to be able to remain competitive and attract customers. The range should be balanced to secure a positive impact on vitality and viability. Ensuring a good range means that visitors to the town centre are retained, and less likely to shop elsewhere.
- 3.1.2 Comparison over time between 2014 and 2017 has been included. 2014 has been chosen as this was the first year of surveys following LDP adoption.

#### **3.2 Retail sub-class**

- 3.2.1 The scale and variety of retail units in the LDP designated Primary Shopping Areas and Shopping Zones affects vitality and viability. It is important for town centres to secure a wide range of services in order to remain competitive and attract customers. Looking at the retail sub-class of units helps show the balance in each of the town centres. This also includes details of retail units which sell comparison and convenience goods. A balance of both is required to encourage and retain customers.
- 3.2.2 Comparison over time between 2014 and 2017 has been included. 2014 has been chosen as this was the first year of surveys following LDP adoption.
- 3.2.3 Examples of comparison and convenience goods are in Appendix 1.

#### **3.3 Key attractors and multiple traders**

- 3.3.1 Vitality can also be affected by the quality and variety of retailers represented. National retail names are important to attract customers to a town. Independent retailers also benefit the vitality of the town through creating a unique identity, and so it is beneficial to town centres to secure a balanced mix of national names and independent retailers. Please see Appendix 1 for definitions of key attractors and other traders.
- 3.3.2 Charity shops has been included as a separate category. Opinions vary over whether charity shops benefit the retail scene and vitality and viability of town centres.
- 3.3.3 Comparison over time between 2014 and 2017 has been included. 2014 has been chosen as this was the first year of surveys following LDP adoption.

### **3.4 Accessibility**

- 3.4.1 A large proportion of town centre users will choose to travel by car. Adequate and convenient parking is therefore important for town centre vibrancy. An appropriate number of conveniently located short stay spaces is required to ensure the needs of shoppers are met. Longer stay spaces are, normally, in less convenient locations for workers and longer stay visitors are also required. 15% vacant spaces is considered as the minimum threshold for the availability of on-street parking. A survey of car parks has been conducted in Llandudno and Colwyn Bay town centres.
- 3.4.2 National planning policy seeks to ensure that retail centres are accessible by public transport. Details of bus and train services have been included for all town centres. Ensuring that the town centre is accessible by a range of services from local towns, which are frequent, will result in more visitors to the town centre and ease traffic congestion. For smaller centres, good links to larger centres will bring more visitors to the local centre and encourage linked trips.

### **3.5 Pedestrian flows**

- 3.5.1 The flow of pedestrians in the town centre, such as shoppers, tourists, residents or workers, are an important factor, which impacts the success of town centre businesses. The higher the flows are, the higher the potential number of shoppers and spend is, and the better a retail centre trades. The number of people passing in both directions for ten minutes was recorded in key locations in Llandudno and Colwyn Bay.

### **3.6 Vacancy rates**

- 3.6.1 Vacant units can affect the vitality and viability of a town centre. There are many factors which can impact on vacancy rates, and so caution is needed when using this as an indicator, as low vacancy rates are not always an indicator of retail health. Long term vacant units can, however, indicate an issue with the town centre, even when overall vacancies are low.
- 3.6.2 The figure used for Conwy County Borough includes the retail units in the Primary Shopping Areas and Shopping Zones, as designated in the Conwy LDP only. It does not include all retail units in the County Borough.
- 3.6.3 Comparison over time between 2014 and 2017 has been included. 2014 has been chosen as this was the first year of surveys following LDP adoption.

### **3.7 Customer views**

- 3.7.1 Regular surveys of town centre users and businesses can help monitoring and evaluating the effectiveness of town centre improvements and management. These surveys have only been conducted in the larger town centres of Llandudno and Colwyn Bay.
- 3.7.2 The town centre users survey shows how the town is seen by those who use it. 100 people completed the surveys in each town centre. The results show a more detailed picture of what is positive and negative about the town centre.

- 3.7.3 The questions included main purpose, how often they visit, how they travelled, where they travelled from, spend, length of visit, positive and negative aspects of the town centre and suggestions for improvements.
- 3.7.4 A business confidence survey helps to establish the economy of the town and trading conditions of the town centre businesses. Strong local businesses mean a vibrant local economy which will benefit the town centre.
- 3.7.5 Questions included nature and type of business, where they are located, number of employees, how long they had been operating, turnover and profitability, whether they had suffered from any crime, positive and negative aspects of the town centre and suggestions for improvements.

### **3.8 Natural and built environment**

- 3.8.1 Environment quality is important to shoppers and business owners in town centres. Litter, graffiti and trees have been looked at for the larger centres of Llandudno and Colwyn Bay.
- 3.8.2 Historic designations, such as listed buildings, Conservation Areas, Historic Landscapes, Historic Parks and Gardens and a UNESCO World Heritage Site are all part of the heritage of Conwy County Borough. Many of these designations can be found in and near to the LDP designated retail centres. They contribute significantly towards the distinct built environment and create a unique sense of character for many of the town centres.

### **3.9 Crime and safety**

- 3.9.1 A sense of safety and low occurrence of crime contributes towards town centre health. High crime rates and a perception of feeling unsafe will deter businesses from locating to a centre and deter customers from visiting. Crime maps have been included for all retail centres, which show localised hot spots for the number of incidents. It should be noted that, overall, Conwy County Borough is a low crime area.
- 3.9.2 There is also a question in the business confidence survey (see Customer views above) regarding being a victim of crime and one on perception of safety in the town centre users survey.

## **4 Summary of findings**

### **4.1 Llandudno**

- Surveys indicate that 71% of businesses in the LDP designated town centre are A1 shops, which is higher than the national averages.
- Of the A1 units, a large proportion of these sell comparison goods particularly in the town centre core of the LDP designated Primary Shopping Area.
- Of the A1 units, around one third are national retail brand names. This is comparable overall to the national averages, but the key attractors are a little a

lower. There is a high proportion of independent retailers in the LDP designated Shopping Zone, which helps establish a unique identity.

- The number of bus and train routes, and frequency of services show that Llandudno is highly accessible by public transport.
- Parking occupancy surveys indicates that there is an issue with on-street parking in Llandudno, as the number of vacant spaces is low. There are, however, vacancies in the larger car parks.
- The numbers of customers passing by is high in the retail core of the LDP Primary Shopping Area, however, it is lower in the Shopping Zones, indicating that circulation around the town could be improved.
- The vacancy data for Llandudno indicates an average level of 6% across the town, which is lower than the national averages.
- In terms of recent business performance, 45% said that turnover had increased or stayed the same over the last year. This combined figure is comparable to the national average of 44% for small towns but lower than the large towns (71%). The proportion of Llandudno businesses that had increased or maintained their profitability in the last 12 months was 52% and significantly lower than the national averages for small (71%) and large towns (66%).
- Looking to the future, 52% of businesses expect turnover to go up or stay the same compared to the previous year (61%) and this is less than for both large (79%) and small (71%) towns nationally.
- From the responses by businesses to the survey, potential tourist customers (72%) and local customers (70%) are considered the key positive of being located in Llandudno. Prosperity (48%), footfall (45%), physical appearance (43%), retail offer (42%), location (35%), events / activities (32%) and transport links (27%) are all perceived as positives by at least a quarter of businesses who responded. These are generally comparable with national averages, except tourist customers and events / activities, which are significantly higher.
- In terms of negative perceptions about being located in Llandudno, a majority of businesses that responded considered parking (62%) and rental values (50%) to be key issues. Parking is significantly higher than the national averages. Rental values is similar.
- When asked out the positive aspects of Llandudno, its users are markedly more positive than nationally. Physical appearance (100%), cleanliness (99%), customer service (97%), cafes / restaurants (96%), retail offer (94%), access to services (91%) all scored very highly.
- In terms of negatives, the responses from town centre users were very low, with only car parking being rated poorly by more than a third of respondents.
- The number of recorded littering offences in the designated LDP town centre is low.
- There are many listed buildings in the town centre. They represent a key part of the County Borough's built heritage. There is also a designated Conservation Area and Historic Landscape.

- There are certain crime hot spots in Llandudno, but the overall level of recorded crime is considered low.

## 4.2 Colwyn Bay

- Surveys indicate that 72% of businesses in the LDP designated town centre are A1 shops, which is higher than the national averages.
- Of the A1 units, a large proportion of these sell comparison goods particularly in the town centre core of the LDP designated Primary Shopping Area.
- Of the A1 units, around one quarter are national retail brand names. This is comparable overall to the national average for small towns, but the key attractors are lower. There is a high proportion of independent retailers in the LDP designated Shopping Zone, which helps establish a unique identity.
- The number of bus and train routes, and frequency of services show that Colwyn Bay is highly accessible by public transport.
- Parking occupancy surveys indicates that overall Colwyn Bay is a moderately easy place to find a parking space in during the week with 30% of spaces available on a busy day and 32% on a normal day. These figures are comparable with benchmarked towns nationally.
- The numbers of customers passing by is high in the town centre indicating that circulation around the town is good.
- The vacancy data for Colwyn Bay indicates an average level of 16% across the town, which is higher than the national averages and a small increase from the previous year.
- In terms of recent business performance, 46% said that turnover had increased or stayed the same over the last year. This combined figure is comparable to the national average of 44% for small towns and is slightly improved on the previous year's figure (57%). The proportion of Colwyn Bay businesses that had increased or maintained their profitability in the last 12 months was 36% and significantly lower than the national averages for small (71%) and large towns (66%).
- Looking to the future, a reduced proportion of businesses (33%) expect turnover to go up or stay the same compared to the previous year (61%) and this is less than for both large (79%) and small (71%) towns nationally.
- From the responses by businesses to the survey, potential local customers (75%) are considered the key positive of being located in Colwyn Bay. Retail mix (33%), transport links (29%), footfall (29%), and property costs (29%) are all perceived as positives by at least a quarter of businesses who responded. These are comparable with national averages.
- In terms of negative perceptions about being located in Colwyn Bay town centre, a majority of businesses that responded considered empty properties (67%), parking (63%), physical appearance (50%) prosperity of the town (50%) to be key issues and these all compare unfavourably to towns nationally.
- When asked out the positive aspects of Colwyn Bay town centre, its users are markedly more positive than businesses: Ease of walking around the town centre

(93%); access to services (87%); convenience (89%); customer service (86%); transport links (82%); safety (77%); cafes/restaurants (72%) were again given a positive response by over two-thirds of respondents. All of these levels of response compare very favourably with other towns nationally.

- In terms of negatives, the responses from town centre users are much more moderate with only retail offer (43%) and physical appearance (36%) were rated poorly by more than a third of respondents.
- The number of recorded littering offences in the designated LDP town centre is low.
- There are listed buildings in the town centre. There is also a designated Conservation Area.
- There are certain crime hot spots in Colwyn Bay, but the overall level of recorded crime is not a concern.

#### **4.3 Llanfairfechan**

- Surveys indicate that 77% of businesses in the LDP designated town centre are A1 shops, which is higher than the national averages.
- Of the A1 units, a lower proportion of these sell comparison goods when compared with the County Borough average. The level of units selling convenience goods is higher.
- There is a high proportion of independent retailers in Llanfairfechan, which helps establish a unique identity. There are two national multiple trader brands, which is lower than the national averages, but does reflect the size of the retail centre.
- The number of bus and train routes, and frequency of services show that Llanfairfechan is accessible by public transport.
- The vacancy data for Llanfairfechan indicates an average level of 15%, which is higher than the national averages but similar to the previous year.
- There are listed buildings adjacent to the town centre. There is also a designated Conservation Area and Historic Park and Garden.
- There are small crime hot spots in Llanfairfechan, but the overall level of recorded crime is considered low.

#### **4.4 Penmaenmawr**

- Surveys indicate that 64% of businesses in the LDP designated town centre are A1 shops, which is a little higher than the national average.
- Of the A1 units, a lower proportion of these sell comparison goods when compared with the County Borough average. The level of units selling convenience goods is higher. Services are also higher.
- There is a high proportion of independent retailers in Penmaenmawr, which helps establish a unique identity. There are two national multiple trader brands, which is lower than the national averages, but does reflect the size of the retail centre.
- The number of bus and train routes, and frequency of services show that Penmaenmawr is accessible by public transport.

- The vacancy data for Penmaenmawr indicates an average level of 7%, which is comparable to the national averages and lower than the previous year.
- There are some listed buildings adjacent to the town centre. There is also a designated Conservation Area.
- There are small crime hot spots in Penmaenmawr, but the overall level of recorded crime is considered low.

#### **4.5 Conwy**

- Surveys indicate that 62% of businesses in the LDP designated town centre are A1 shops, which is higher than the national averages. A3 Food and drink is significantly higher, indicating that the mix is a little unbalanced.
- Of the A1 units, the proportion of these selling comparison goods is comparable with the County Borough average. The level of units selling convenience goods is higher.
- There is a high proportion of independent retailers in Conwy, which helps establish a unique identity. There are five national multiple trader brands, which is lower than the national averages, but does reflect the size of the retail centre.
- The number of bus and train routes, and frequency of services show that Conwy is accessible by public transport.
- The vacancy data for Conwy indicates an average level of 4%, which is much lower than the national averages and lower than the previous year.
- There are many listed buildings in the town centre. There is also a designated Conservation Area and the internationally important UNESCO World Heritage Site of Conwy Castle.
- There are small crime hot spots in Conwy, but the overall level of recorded crime is considered low.

#### **4.6 Llandudno Junction**

- Surveys indicate that 55% of businesses in the LDP designated town centre are A1 shops, which is similar to the national averages.
- Of the A1 units, a lower proportion of these sell comparison goods when compared with the County Borough average. The level of units selling convenience goods is also lower, and services is much higher.
- There is a high proportion of independent retailers in Llandudno Junction, which helps establish a unique identity. There are two national multiple trader brands, which is lower than the national averages, but does reflect the size of the retail centre.
- The number of bus and train routes, and frequency of services show that Llandudno Junction is very accessible by public transport.
- The vacancy data for Llandudno Junction indicates an average level of 10%, which is higher than the national averages but similar to the previous year.
- There is one small crime hot spot in Llandudno Junction, and the overall level of recorded crime is considered low.

#### **4.7 Abergele**

- Surveys indicate that 58% of businesses in the LDP designated town centre are A1 shops, which is higher than the national averages.
- Of the A1 units, a lower proportion of these sell comparison goods when compared with the County Borough average. The level of units selling convenience goods is comparable and services is higher.
- There is a high proportion of independent retailers in Abergele, which helps establish a unique identity. There are five national multiple trader brands and one key attractor, which is lower than the national averages, but good for a town of this size.
- The number of bus and train routes, and frequency of services show that Abergele is accessible by public transport, however, town centre customers are unlikely to use the train station because of the distance from the town centre.
- The vacancy data for Abergele indicates an average level of 11%, which is higher than the national averages and a small increase on the previous year.
- There are some listed buildings in and around the town centre. There is also a designated Conservation Area.
- There are small crime hot spots in Abergele, but the overall level of recorded crime is considered low.

#### **4.8 Llanrwst**

- Surveys indicate that 59% of businesses in the LDP designated town centre are A1 shops, which is higher than the national averages.
- Of the A1 units, a lower proportion of these sell comparison goods when compared with the County Borough average. The level of units selling convenience goods and services are higher.
- There is a high proportion of independent retailers in Llanrwst, which helps establish a unique identity. There are three national multiple trader brands, which is lower than the national averages, but does reflect the size of the retail centre.
- The number of bus and train routes, and frequency of services show that Llanrwst is accessible by public transport.
- The vacancy data for Llanrwst indicates an average level of 14%, which is higher than the national averages and an increase on the previous year.
- There are some listed buildings in and around the town centre. There is also a designated Conservation Area.
- There are small crime hot spots in Llanrwst, but the overall level of recorded crime is considered low.

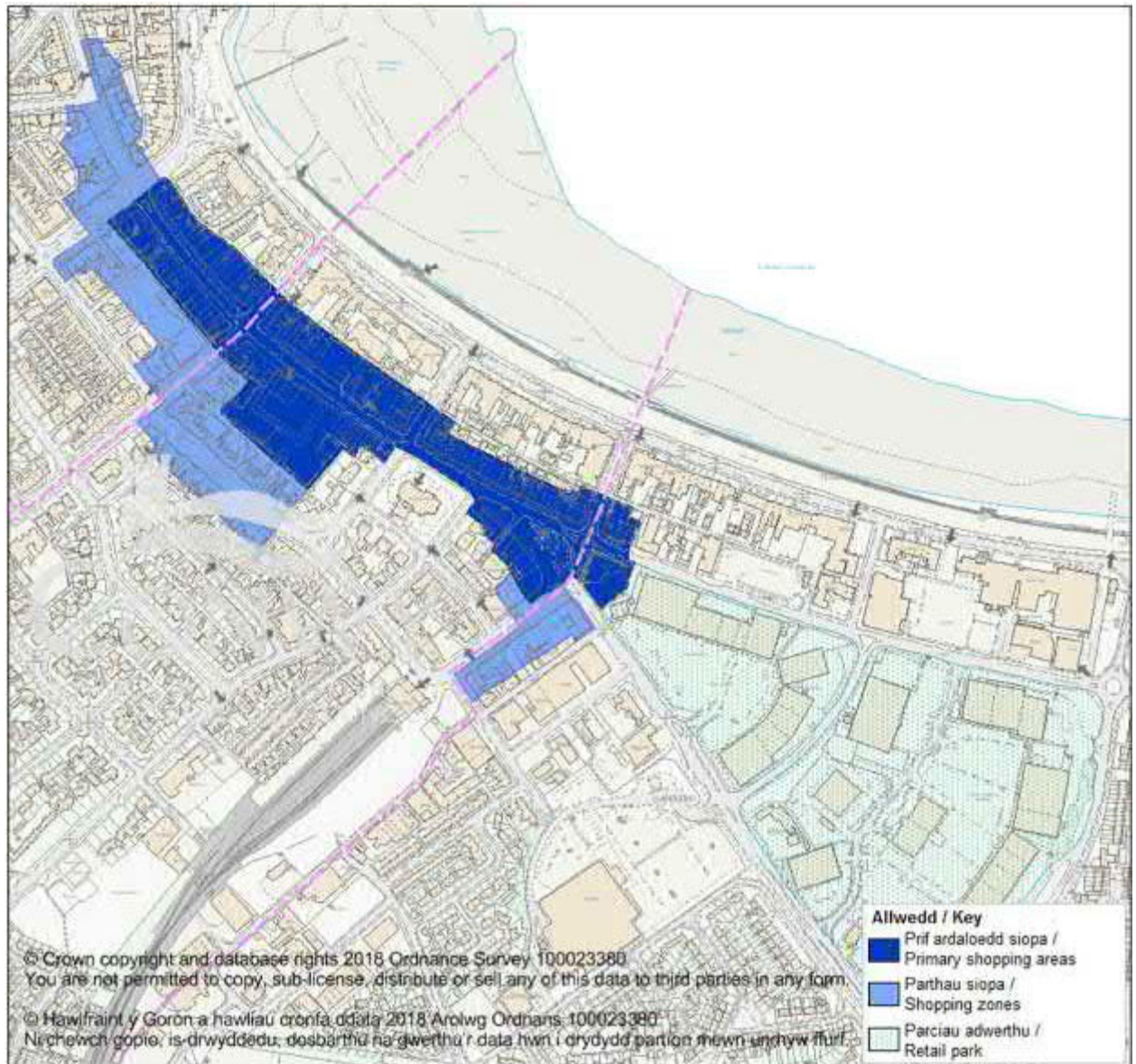
## 5 Llandudno

### 5.1 General introduction

- 5.1.1 Llandudno is defined in the LDP retail hierarchy as a sub-regional centre. LDP designations include a Primary Shopping Area, Shopping Zone and Retail Parks at Parc Llandudno and Mostyn Champneys. In 2017, there were 288 retail units in the town centre designations. This is the highest for all retail centres in the LDP area.

#### Map 1: LDP retail designations in Llandudno

Source: Conwy LDP 2007-2022



### 5.2 Use classes

- 5.2.1 There is a high level of A1 (shops) in the retail areas of Llandudno, in particular the Primary Shopping Area. This reflects the designation and priority given to A1 uses in this location. Although lower, the Shopping Zone still has a high A1 percentage, which is also higher than the national large and small towns average overall. A2 (financial and

professional services) uses is lower than the national average, which could be a concern, as a range of uses is required for good town centre health, and is a requirement of national planning policy. A3 (food and drink) is also low when compared to the County Borough and national towns averages. Hot food take away is slightly lower, particularly in the Primary Shopping Area.

**Table 1: Use classes in Llandudno (2017)**

Source: Experian; CCBC site visits & Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	A1		A2		A3		A2 & A3		Hot food take away	
	No.	%	No.	%	No.	%	No.	%	No.	%
<b>National large towns average</b>		52%		13%		17%		30%		3%
<b>National small towns average</b>		52%		14%		16%		30%		4%
<b>Conwy County Borough*</b>		68%		12%		21%		32%		11%
<b>Llandudno*</b>	204	71%	24	8%	60	21%	72	25%	7	2%
<b>Primary Shopping Area</b>	123	77%	12	8%	25	16%	37	24%	3	2%
<b>Shopping Zone</b>	81	63%	12	9%	33	27%	35	27%	4	3%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 5.2.2 Please see Appendix 2 for maps showing the distribution of use classes in the designated LDP areas.

**Table 2: Use classes over time in Llandudno**

Source: Experian & CCBC site visits

	Year	A1		A2		A3		Non-A1		Hot food take away	
		No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	523	66%	110	14%	164	21%	274	34%	44	6%
	<b>2017</b>	613	68%	107	12%	187	21%	294	32%	100	11%
<b>Llandudno*</b>	<b>2014</b>	197	72%	25	9%	53	19%	78	28%	7	3%
	<b>2017</b>	204	71%	24	8%	60	21%	84	29%	7	2%
<b>Primary Shopping Area</b>	<b>2014</b>	119	79%	12	8%	20	13%	32	21%	3	2%
	<b>2017</b>	123	77%	12	8%	25	16%	37	23%	3	2%
<b>Shopping Zone</b>	<b>2014</b>	78	63%	13	10%	33	27%	46	37%	4	3%
	<b>2017</b>	81	63%	12	9%	35	27%	47	37%	4	3%

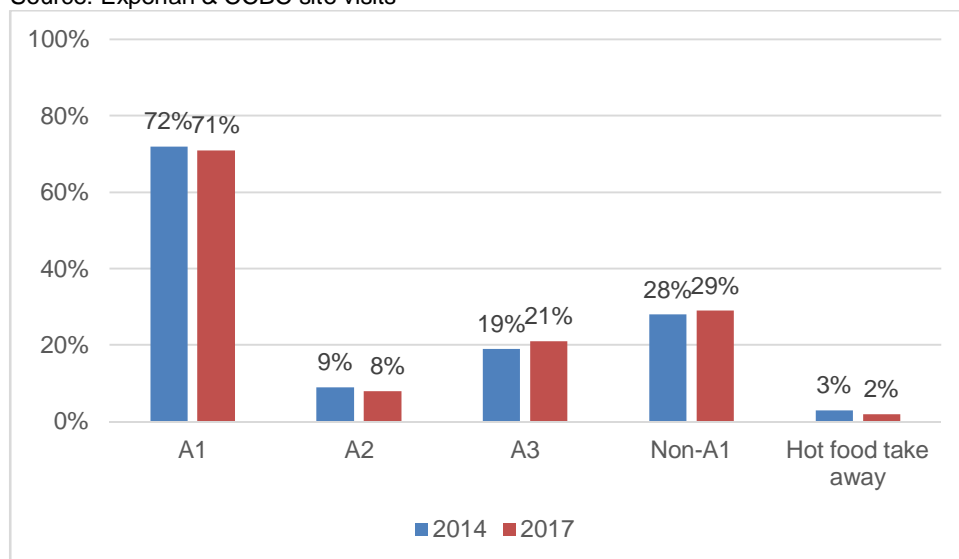
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 5.2.3 There has been a small decrease in the level of A1 (shops) in the town centre, but actually, the number of A1 units has increased slightly. The number of A2 (financial and professional services) has decreased by one. The number of A3 (food and drink) has increased, mostly in the LDP Primary Shopping Area. This reflects national retailing

trends, where demand for café type uses has increased. There has been no change in the number of hot food take away units in Llandudno.

### Chart 1: Use classes over time in Llandudno

Source: Experian & CCBC site visits



## 5.3 Retail sub-class

### Table 3: Retail sub-class in Llandudno (2017)

Source: Experian & site visits

	Conwy County Borough*	Llandudno					
		Total*		Primary Shopping Area		Shopping Zone	
		No	%	No	%	No	%
<b>All units**</b>	871	284		153		131	
<b>Convenience</b>	8%	23	8%	16	10%	7	5%
<b>Comparison</b>	40%	130	46%	81	53%	49	37%
<b>Service</b>	52%	131	46%	56	37%	75	57%
<b>Financial &amp; business services</b>	9%	20	7%	11	7%	9	7%
<b>Health &amp; medical services</b>	1%	2	1%	0	0%	2	2%
<b>Leisure services</b>	25%	67	24%	28	18%	39	30%
<b>Public services</b>	2%	3	1%	1	1%	2	2%
<b>Retail services</b>	14%	38	13%	16	10%	22	17%
<b>Vehicle &amp; transport services</b>	1%	1	0%	0	0%	1	1%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail. Does not include vacancies.

5.3.1 Llandudno has a higher proportion of retail units selling comparison goods when compared to the County Borough, particularly in the Primary Shopping Area. This

reflects its retail function as a sub-regional shopping centre, but may leave it more vulnerable to competition from other large retail centres or online shopping. The proportion of services is lower than the County Borough level for Llandudno as a whole, but is higher in the Shopping Zone, which is to be expected and follows national retail policy recommendations for a variety of uses to be secured in these areas.

**Table 4: Retail sub-class over time in Llandudno**

Source: Experian & site visits

	Year	Total units**	Convenience No.	%	Comparison No.	%	Service No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	879		9%		40%		51%
	<b>2017</b>	871		8%		40%		52%
<b>Llandudno*</b>	<b>2014</b>	286	26	9%	139	49%	121	42%
	<b>2017</b>	284	23	8%	130	46%	131	46%
<b>Primary Shopping Area</b>	<b>2014</b>	155	18	12%	88	57%	49	32%
	<b>2017</b>	153	16	10%	81	53%	56	37%
<b>Shopping Zone</b>	<b>2014</b>	131	8	6%	51	39%	72	55%
	<b>2017</b>	131	7	5%	49	37%	75	57%

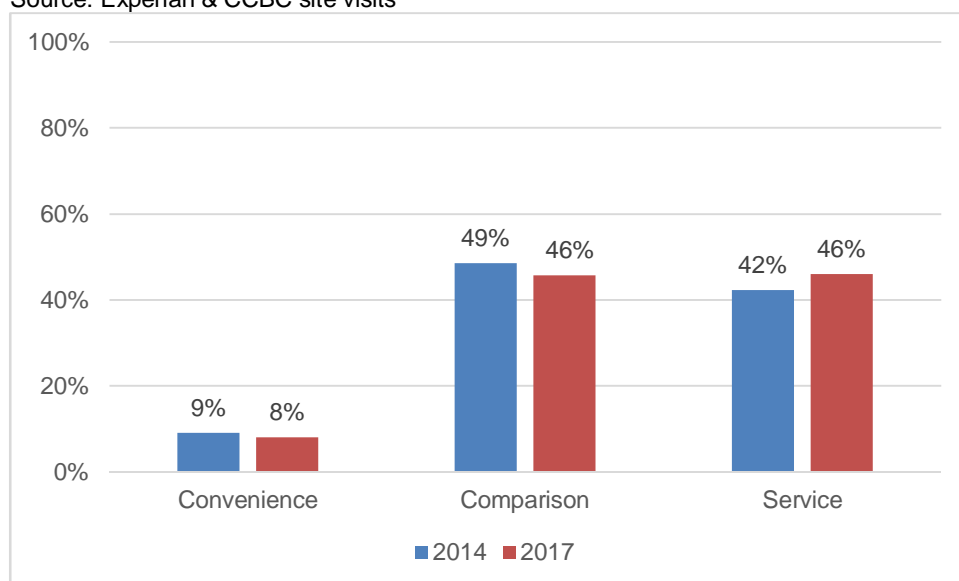
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail. Does not include vacancies.

- 5.3.2 The levels of retail sub-class has changed since 2014 in Llandudno, in both the Primary Shopping Area and Shopping Zones. The number of convenience units has decreased in both designations by three units overall. The number of comparison units has also decreased in both designations by nine units overall. The number of service units has increased in both designations.

**Chart 2: Retail sub-class over time in Llandudno**

Source: Experian & CCBC site visits



## 5.4 Key attractors and multiple traders

**Table 5: Key attractors and multiple traders in Llandudno (2017)**

Source: Experian, Heart of our town report Colwyn Bay 2017 (People & Places Partnership) & CCBC site visits

	Key attractor		Multiple trader		Regional trader		Independent trader		Charity shops	
	No	%	No	%	No	%	No	%	No	%
<b>National large towns average</b>		10%		25%		10%		56%		-
<b>National small towns average</b>		7%		19%		10%		64%		-
<b>Conwy County Borough*</b>		4%		16%		2%		72%		6%
<b>Llandudno (total)</b>	27	7%	114	27%	6	1%	242	58%	26	6%
<b>Llandudno town centre*</b>	9	5%	45	24%	3	2%	121	63%	13	7%
<b>Primary Shopping Area</b>	9	8%	40	35%	3	3%	56	49%	7	6%
<b>Shopping Zone</b>	0	0%	5	7%	0	0%	65	86%	6	8%
<b>Retail parks</b>	9	27%	24	73%	0	0%	0	0%	0	0%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.  
NB Does not include vacant units

- 5.4.1 Nine key attractor national retail brands are found in Llandudno town centre, and another nine in the retail parks. This is slightly lower than found nationally in large towns, but comparable with small towns. There is also a large number of national multiple trader brands in Llandudno, particularly in the Primary Shopping Area. This level is higher than the national averages and reflects Llandudno's retail function as a sub-regional shopping centre. The Shopping Zone is made up mostly of independent traders, with a small number of charity shops and national multiple traders. This is a little unbalanced, but shows that the big names are drawn to the core retail centre, which is to be expected. The level of independent traders overall is comparable to the national averages, and indicates that Llandudno has its own identity.

**Table 6: Key attractors and multiple traders over time in Llandudno**

Source: Experian & CCBC site visits

	Year	Total A1**	Key attractor		Multiple trader		Regional trader		Independent trader		Charity	
			No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	538	21	4%	111	21%	5	1%	361	67%	40	7%
	<b>2017</b>	542	19	4%	88	16%	9	2%	391	72%	35	6%
<b>Llandudno town centre*</b>	<b>2014</b>	198	12	6%	53	27%	3	2%	113	57%	17	9%
	<b>2017</b>	191	9	5%	45	24%	3	2%	121	63%	13	7%
<b>Primary Shopping Area</b>	<b>2014</b>	120	12	10%	44	37%	3	3%	55	46%	6	5%
	<b>2017</b>	115	9	8%	40	35%	3	3%	56	49%	7	6%
<b>Shopping Zone</b>	<b>2014</b>	78	0	0%	9	12%		0%	58	74%	11	14%
	<b>2017</b>	76	0	0%	5	7%		0%	65	86%	6	8%

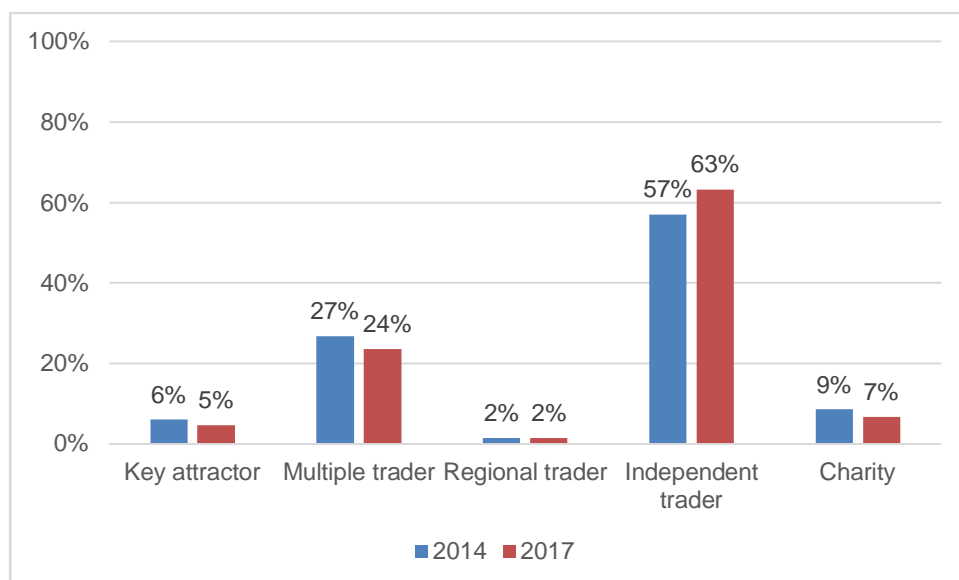
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

5.4.2 There has been some change in the balance between the larger national retail brands and local independent traders in Llandudno since the LDP was adopted. The number of key attractors has decreased by three units, all from the designated LDP Primary Shopping Area. The number of national multiple trader brands has also decreased by eight units overall, four from each of the Primary Shopping Area and Shopping Zone. The number of independent traders has increased overall by eight units, mostly in the Shopping Zone. There has been a decrease of seven charity shops.

**Chart 3: Key attractors and multiple traders over time in Llandudno**

Source: Experian & CCBC site visits



## 5.5 Accessibility

### Public transport

**Table 7: Trains serving Llandudno (2018)**

Source: Arriva Trains Wales

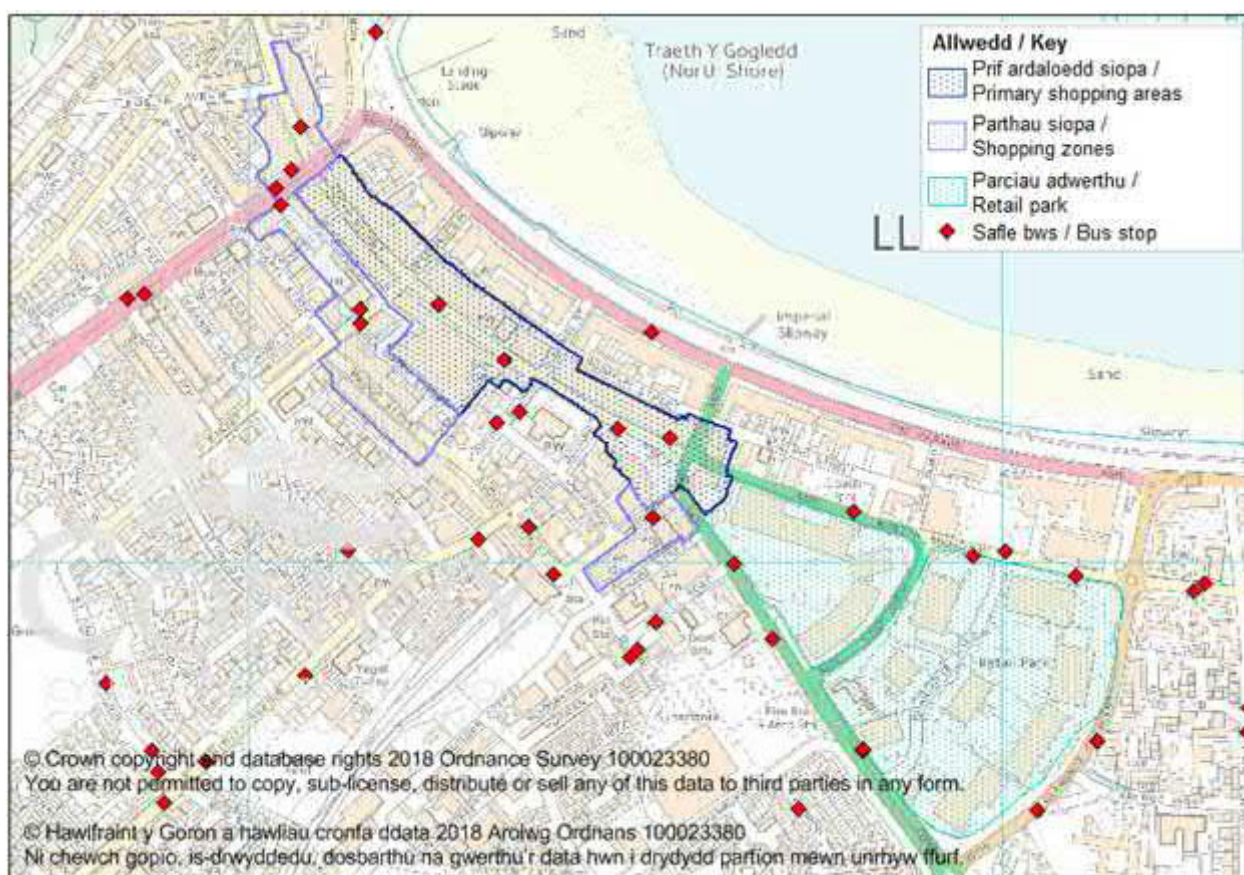
Route	Day	Inbound Journeys	Outbound Journeys	Total journeys per day
London - Birmingham - Crewe - Manchester - Chester - Holyhead	Monday-Friday	24	27	51
	Saturday	33	32	65
	Sunday*	15	15	30
Birmingham - Shrewsbury - Chester - Holyhead	Monday-Friday	1	3	4
	Saturday	-	-	-
	Sunday	-	-	-
Llandudno - Blaenau Ffestiniog	Monday-Friday	5	4	9
	Saturday	-	-	-
	Sunday	-	-	-

\*Between 20/05 and 09/09 only

- 5.5.1 Llandudno train station is approximately 20 metres from one part of the edge of the designated Shopping Zone and approximately 250 metres from the other part. The station has a number of regular trains Monday-Saturday, but fewer on a Sunday.

## Map 2: Bus stops serving Llandudno

Source: Environment, Roads & Facilities, Conwy County Borough Council



- 5.5.2 There are 11 bus stops in the designated LDP Primary Shopping Area and Shopping Zones of Llandudno, with others nearby. The retail centre is well served by a range of bus routes all days of the week, although there are fewer services on a Sunday.

**Table 8: Buses serving Llandudno (2018)**

Source: Arriva

Main route	Service days	Inbound Journeys	Outbound Journeys	Total journeys per day
<b>Number 5</b> Bangor - Llanfairfechan - Penmaenmawr - Conwy - Llandudno Junction - Llandudno	Mon-Fri Sat Sun	31 31 14	29 28 14	60 59 28
<b>Number 12</b> Llandudno - Rhos-on-Sea - Colwyn Bay - Abergele - Towyn - Kinmel Bay - Rhyl	Mon-Fri Sat Sun	69 69 -	69 69 -	138 138 -
<b>Number 13</b> Llandudno - Mochdre - Colwyn Bay - Abergele - Prestatyn	Mon-Fri Sat Sun	25 24 -	24 24 -	49 48 -
<b>Number 14/15</b> Conwy - Deganwy - Llandudno - Rhos-on-Sea - Colwyn Bay - Llysfaen	Mon-Fri Sat Sun	27 27 -	27 25 -	54 52 -
<b>Number 19</b> Cwm Penmachno - Betws-y-Coed - Llanrwst - Conwy - Llandudno Junction - Llandudno	Mon-Fri Sat Sun	13 13 -	12 12 -	25 25 -
<b>Number 25</b> Eglwysbach - Glan Conwy - Llandudno Junction - Llandudno	Mon-Fri Sat Sun	7 7 -	7 7 -	14 14 -
<b>Number 26</b> Great Orme - Llandudno - Great Orme (circular service)	Mon-Fri Sat Sun	10 10 -	10 10 -	10 10 -
<b>Number 75</b> Llandudno - Deganwy - Llandudno Junction - Conwy - Penmaenmawr - Llanfairfechan	Mon-Fri Sat Sun	2 2 -	2 2 -	4 4 -
<b>Number X5</b> Bangor - Llanfairfechan - Penmaenmawr - Conwy - Deganwy - Llandudno	Mon-Fri Sat Sun	22 19 11	23 22 11	45 41 22
<b>Number X19</b> Blaenau Ffestiniog - Dolwyddelan - Betws-y-Coed - Llanrwst - Conwy - Llandudno Junction - Deganwy - Llandudno	Mon-Fri Sat Sun	9 8 -	10 8 -	19 16 -

## Car parking

- 5.5.3 15% vacant spaces is considered as the minimum threshold for the availability of on-street parking. The vacancy rate for this parking type is 5%, well below this recommended level. This reflects findings of customer views, where there were many comments regarding difficulty in finding on-street parking in Llandudno. The 36%

vacancy level in car parks shows that it is relatively easy to find a parking space of this type in Llandudno.

**Table 9: car parking in Llandudno (2017)**

Source: site visits

	National large towns	National small towns	Llandudno	
			Number	%
<b>All town centre parking</b>	-	-	<b>1,370</b>	
Short stay spaces (4 hours and under)	47%	38%	250	18%
Long stay spaces (over 4 hours)	39%	53%	1,120	82%
Disabled spaces	4%	7%	67	5%
Vacant spaces	34%	34%	394	29%
<b>Car parks</b>	92%	84%	<b>1,032</b>	<b>75%</b>
Short stay spaces (4 hours and under)	44%	29%	102	10%
Long stay spaces (over 4 hours)	42%	61%	930	90%
Disabled spaces	4%	7%	55	5%
Vacant spaces	35%	38%	376	36%
<b>On street</b>	8%	16%	<b>338</b>	<b>25%</b>
Short stay spaces (4 hours and under)	85%	82%	148	44%
Long stay spaces (over 4 hours)	4%	12%	190	56%
Disabled spaces	10%	6%	12	4%
Vacant spaces	17%	18%	18	5%
<b>Out of town</b>	-	-	<b>1,021</b>	<b>-</b>
Disabled spaces	-	-	35	3%
Vacant spaces	-	-	664	65%

## 5.6 Pedestrian flows

- 5.6.1 The data indicates that parts of Llandudno are significantly busier than the national small towns average. It suggests that pedestrians are not circulating from the main retail area to other parts of the town, where footfall is much lower. More surveys are needed to monitor this to see if it is a regular trend.

**Table 10: pedestrian flows in Llandudno (2017)**

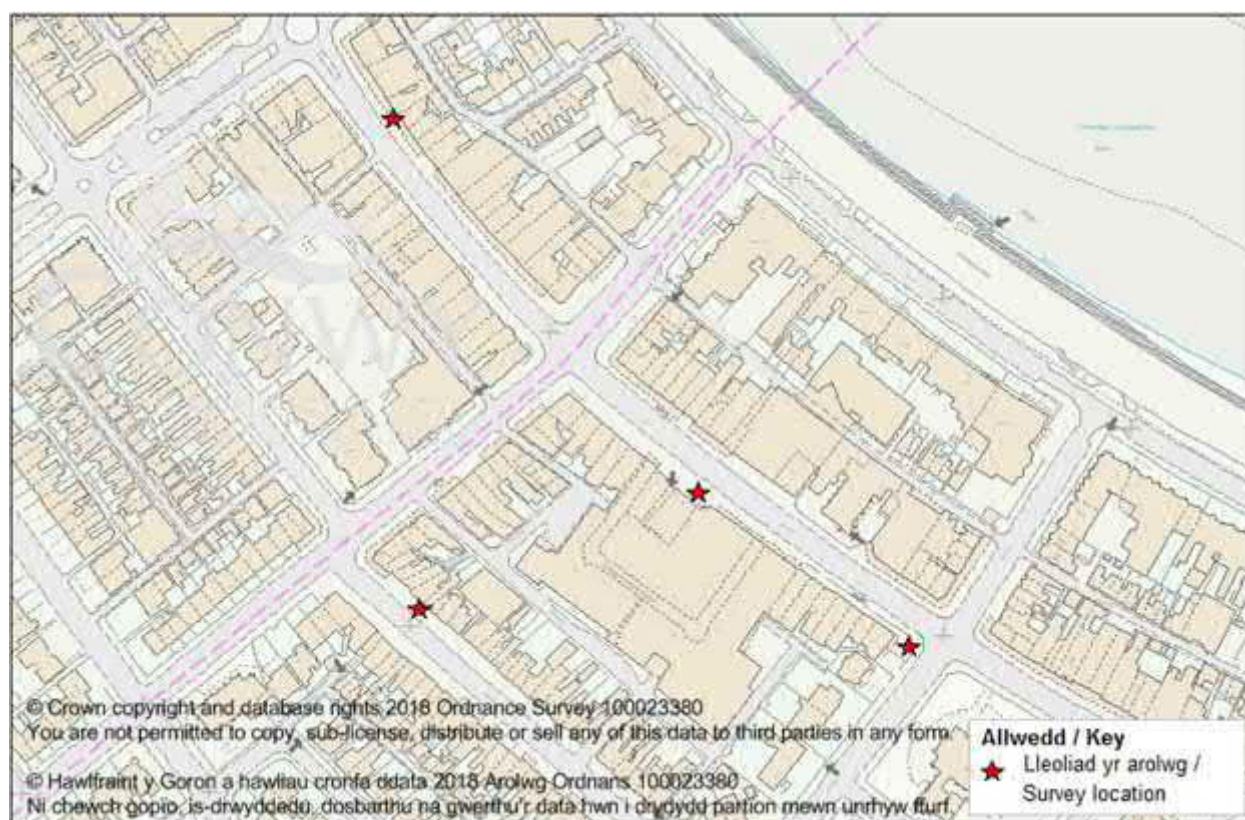
Source: CCBC site visits, Heart of our town report Colwyn Bay (People & Places Partnership)

Site	National large towns average	National small towns average	Average for Llandudno	Time		
				10-11am	11am-12pm	12-1pm
Outside Sainsbury's Mostyn Street	239	86	66	35	71	93
Outside library building Mostyn Street			140	93	160	168
Outside Lloyds Bank Trinity			140	90	168	163
Opposite Londis Madoc Street			29	26	29	33

5.6.2 The location of the survey points is on the map below.

**Map 3: Location for pedestrian flows in Llandudno**

Source: CCBC site visits



## 5.7 Vacancy rates

**Table 11: Vacancy rates in Llandudno (2017)**

Source: Experian & site visits

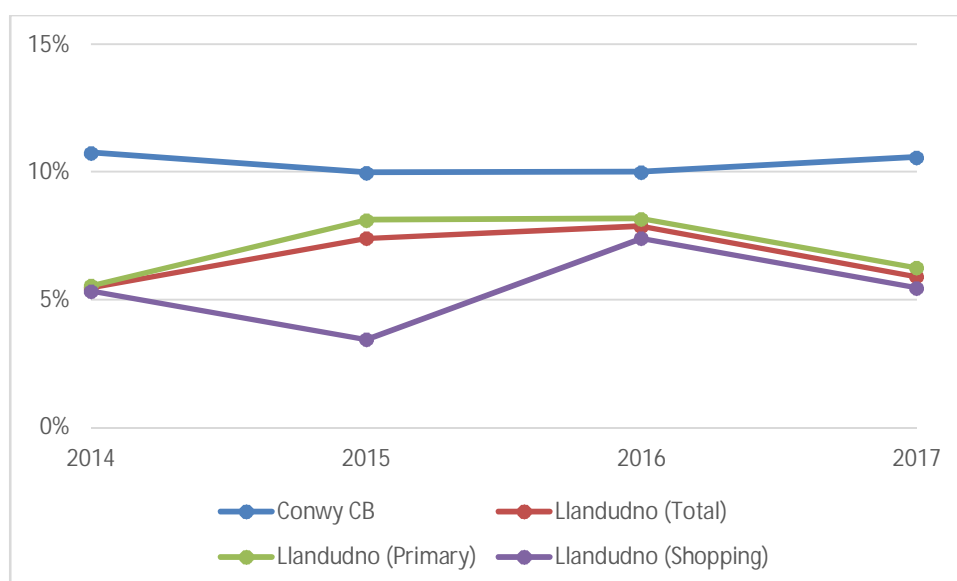
	Total number of retail units	Vacant	
		Number	%
<b>National large towns</b>	-	-	<b>7%</b>
<b>National small towns</b>	-	-	<b>9%</b>
<b>Conwy County Borough*</b>	<b>907</b>	<b>96</b>	<b>11%</b>
<b>Llandudno town centre*</b>	288	17	6%
<b>Primary Shopping Area</b>	160	10	6%
<b>Shopping Zone</b>	128	7	5%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zone only.

- 5.7.1 The vacancy rate in Llandudno is low at only 6%, and is comparable with the national large town average. 11 out of the 17 town centre units were vacant for more than 12 months. This will need monitoring in future, as long-term vacancies are a concern. Looking at vacancies since LDP adoption in 2013, there has been a small decline in the last 12 months, which has brought the levels back to as they were in 2014.

**Chart 4: Vacancies over time in Llandudno**

Source: Experian and site visits



## 5.8 Customer views

### Business confidence survey

- 5.8.1 Questionnaires were distributed to all businesses operating in Llandudno town centre and the Retail Parks. 62 returned the survey and the findings are summarised in the following tables.

**Table 12: Survey results for Llandudno (2017)**

Source: Conwy County Borough Council and Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	National large towns average	National small towns average	Llandudno	
			No.	%
<b>Nature of business?</b>				
Retail	56%	63%	42	70%
Financial services	14%	12%	7	12%
Public sector	1%	2%	0	0%
Food and drink	13%	13%	10	17%
Accommodation	1%	1%	1	2%
Other	15%	9%	3	5%
<b>Type of business?</b>				
Multiple trader	11%	0%	14	23%
Regional trader	11%	14%	8	13%
Independent trader	78%	86%	38	63%
<b>Where is your business located?</b>				
Town centre	-	-	55	92%
Parc Llandudno	-	-	1	2%
Mostyn Champneys	-	-	2	3%
<b>How long has your business been in the town?</b>				
Less than a year	4%	11%	2	3%
One to five years	27%	13%	12	20%
Six to ten years	9%	11%	11	18%
More than ten years	60%	44%	35	58%
<b>Compared to last year has your turnover...?</b>				
Increased	42%	33%	17	28%
Stayed the same	29%	11%	10	17%
Decreased	29%	44%	31	52%
<b>Compared to last year has your profitability...?</b>				
Increased	37%	43%	15	25%
Stayed the same	27%	29%	16	27%
Decreased	36%	29%	27	45%
<b>Over the next 12 months do you think your turnover will...?</b>				
Increase	43%	57%	14	23%
Stayed the same	36%	14%	22	37%
Decrease	21%	29%	22	37%

5.8.2 Of the businesses that responded to the survey, 70% were retailers of which 36% were national or regional multiples and 63% were independents. This is representative of the

mix of business types in the town. 76% of the businesses are long-established in Llandudno having been based there for more than six years.

- 5.8.3 In terms of recent business performance, 45% said that turnover had increased or stayed the same over the last year. This combined figure is comparable to the national average of 44% for small towns but lower than the large towns (71%). The proportion of Llandudno businesses that had increased or maintained their profitability in the last 12 months was 52% and lower than the national averages for small (71%) and large towns (66%).
- 5.8.4 Looking to the future, 52% of businesses expect turnover to go up or stay the same. This is less than for both large (79%) and small (71%) towns nationally. Of concern is that the fact that 37% of Llandudno town centre and retail park based businesses surveyed expect profitability to continue to decrease in the year ahead. This is higher than towns nationally and seemingly year-on-year declines in performance suggest that this proportion of businesses may be particularly vulnerable to competition from elsewhere.
- 5.8.5 Crime incidents for business owners who responded in Llandudno are higher (47%) than the national averages (36% large towns and 28% small towns). Almost all offences were for theft.

**Table 13: Survey results for Llandudno (2017)**

Source: Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	National large towns average	National small towns average	Llandudno
<b>Has your business suffered from any crime over the last 12 months?</b>			
<b>Yes</b>	36%	28	47%
<b>No</b>	64%	32	53%
<b>What type of crime has your business suffered from?</b> (only yes responses from above included)			
<b>Theft</b>	63%	73%	96%
<b>Criminal damage</b>	39%	25%	18%
<b>Abuse</b>	17%	14%	18%
<b>Other</b>	16%	4%	0%

- 5.8.6 From the responses by businesses to the survey, potential tourist customers (72%) and local customers (70%) are considered the key positive of being located in Llandudno. Prosperity (48%), footfall (45%), physical appearance (43%), retail offer (42%), location (35%), events / activities (32%) and transport links (27%) are all perceived as positives by at least a quarter of businesses who responded. These are generally comparable with national averages, except tourist customers and events / activities, which are significantly higher.
- 5.8.7 In terms of negative perceptions about being located in Llandudno town centre, a majority of businesses that responded considered parking (62%) and rental values (50%)

to be key issues. Parking is significantly higher than the national averages. Rental values is similar.

**Table 14: Survey results for Llandudno (2017)**

Source: Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	Positive aspects of being located in the town centre			Negative aspects of being located in the town centre		
	National large towns average	National small towns average	Llandudno	National large towns average	National small towns average	Llandudno
Physical appearance	44%	44%	43%	22%	22%	3%
Prosperity	39%	39%	48%	29%	29%	2%
Labour pool	-	-	3%	14%	14%	13%
Location	-	39%	35%	-	-	3%
Retail offer	39%	40%	42%	7%	7%	8%
Vacant units	-	-	-	21%	21%	37%
Tourist customers	40%	36%	72%	41%	41%	2%
Local customers	36%	77%	70%	11%	11%	2%
Affordable housing	77%	15%	5%	3%	3%	7%
Transport links	15%	34%	27%	10%	10%	5%
Footfall	34%	-	45%	14%	14%	7%
Car parking	26%	32%	17%	20%	20%	62%
Rental values	32%	16%	12%	50%	50%	50%
Market	16%	14%	7%	-	-	3%
Events/ Activities	14%	22%	32%	40%	40%	7%
Marketing/ Promotions	22%	10%	13%	37%	37%	3%
Local Partnerships/ Organisations	10%	17%	7%	7%	7%	0%
Business competition	-	-	-	29%	29%	17%
Competition: other localities	-	-	-	10%	10%	18%
Competition: out of town shopping	-	-	-	17%	17%	35%
Competition: internet	-	-	-	25%	25%	40%
Other	17%	3%	5%	5%	5%	12%

### Town centre users survey

- 5.8.8 The responses from the town centre users indicate a sample from this mid-week survey that comprises more females (78%) than males (22%) and just over half (51%) over 65. This is significantly more elderly than in comparable towns. Most people are in town for leisure (33%) and to access services (25%). This is significantly higher than the national averages, but reflects Llandudno as a tourist destination. 17% visit Llandudno daily and 29% more than once a week, which is slightly lower than the national averages. 23%

visit once a month or less, higher than the national averages, which is likely to be due to tourism.

**Table 15: Survey results for Llandudno (2017)**

Source: Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	National large towns average	National small towns average	Llandudno	
			No.	%
<b>Gender</b>				
<b>Male</b>	35%	32%	22	22%
<b>Female</b>	65%	67%	77	78%
<b>Age</b>				
<b>16-25</b>	8%	7%	0	0%
<b>26-35</b>	18%	15%	10	10%
<b>36-45</b>	22%	24%	12	12%
<b>46-55</b>	20%	22%	8	8%
<b>56-65</b>	16%	16%	19	19%
<b>Over 65</b>	16%	14%	50	51%
<b>What do you generally visit the town centre for?</b>				
<b>Work</b>	11%	10%	11	11%
<b>Convenience shopping</b>	40%	43%	19	19%
<b>Comparison shopping</b>	9%	6%	7	7%
<b>Access services</b>	19%	19%	25	25%
<b>Leisure</b>	13%	11%	33	33%
<b>Other</b>	9%	11%	4	4%
<b>How often do you visit the town centre?</b>				
<b>Daily</b>	19%	21%	17	17%
<b>More than once a week</b>	37%	35%	29	29%
<b>Weekly</b>	21%	21%	12	12%
<b>Fortnightly</b>	7%	7%	3	3%
<b>More than once a month</b>	6%	6%	7	7%
<b>Once a month or less</b>	9%	10%	23	23%
<b>First visit</b>	-	-	8	8%

- 5.8.9 The majority (65%) travelled by car, which is comparable with the national averages. 14% travelled by bus, which is significantly higher than nationally. Only 8% travelled on foot, which is much lower than the national averages, but perhaps reflective of the age profile of respondents.
- 5.8.10 Spend is much higher than the national averages. 32% spent over £50.00 in Llandudno, compared to just 10% and 5% nationally.

**Table 16: Survey results for Llandudno (2017)**

Source: Heart of our town report Colwyn Bay 2017 (People &amp; Places Partnership)

	National large towns average	National small towns average	Llandudno	
			No.	%
<b>How do you normally travel to the town centre?</b>				
On foot	31%	31%	8	8%
Bicycle	1%	1%	2	2%
Car	58%	62%	64	65%
Bus	7%	4%	14	14%
Train	0%	0%	2	2%
Other	2%	2%	9	9%
<b>How much do you normally spend?</b>				
Nothing	3%	3%	0	0%
£0.01-£5.00	9%	11%	0	0%
£5.01-£10.00	19%	23%	14	14%
£10.01-£20.00	30%	32%	17	17%
£20.01-£50.00	28%	24%	36	36%
More than £50.00	10%	5%	32	32%
<b>How long do you stay in the town centre?</b>				
Less than an hour	-	41%	5	5%
1-2 hours	-	41%	21	21%
2-4 hours	--	10%	21	21%
4-6 hours	-	2%	14	14%
All day	-	4%	31	31%
<b>Would you recommend a visit to the town centre?</b>				
Yes	-	59%	86	87%
No	-	41%	0	0%
<b>Where have you travelled from?</b>				
Llandudno			28	28%
Conwy / Deganwy / Llandudno Junction			11	11%
Bay of Colwyn			22	22%
Elsewhere Conwy County			3	3%
Elsewhere North Wales			4	4%
Elsewhere England			29	29%

5.8.11 When asked about the positive aspects of Llandudno town centre, its users are markedly more positive than nationally. Physical appearance (100%), cleanliness (99%), customer service (97%), cafes / restaurants (96%), retail offer (94%), access to services (91%) all scored very highly.

5.8.12 In terms of negatives, the responses from town centre users were very low, with only car parking being rated poorly by more than a third of respondents.

**Table 17: Survey results for Llandudno (2017)**

Source: Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	Positive aspects of being located in the town centre			Negative aspects of being located in the town centre		
	National large towns average	National small towns average	Llandudno	National large towns average	National small towns average	Llandudno
Physical appearance	37%	36%	100%	30%	37%	0%
Cleanliness	31%	35%	99%	31%	25%	0%
Retail offer	29%	19%	94%	42%	53%	4%
Customer service	23%	24%	97%	8%	9%	0%
Cafes / restaurants	29%	32%	96%	5%	20%	2%
Access to services	58%	56%	91%	5%	13%	0%
Leisure facilities	13%	10%	66%	9%	25%	11%
Events/ Activities	15%	14%	74%	9%	19%	8%
Pubs / bars / nightclubs	12%	20%	62%	10%	22%	11%
Transport links	21%	18%	70%	12%	15%	6%
Ease of walking around town centre	67%	56%	87%	5%	6%	1%
Convenience e.g. Near where you live	67%	64%	68%	5%	4%	1%
Safety	17%	18%	66%	7%	12%	0%
Car parking	28%	32%	44%	41%	39%	37%
Markets	43%	25%	34%	9%	25%	13%
Other	5%	7%	0%	17%	16%	0%

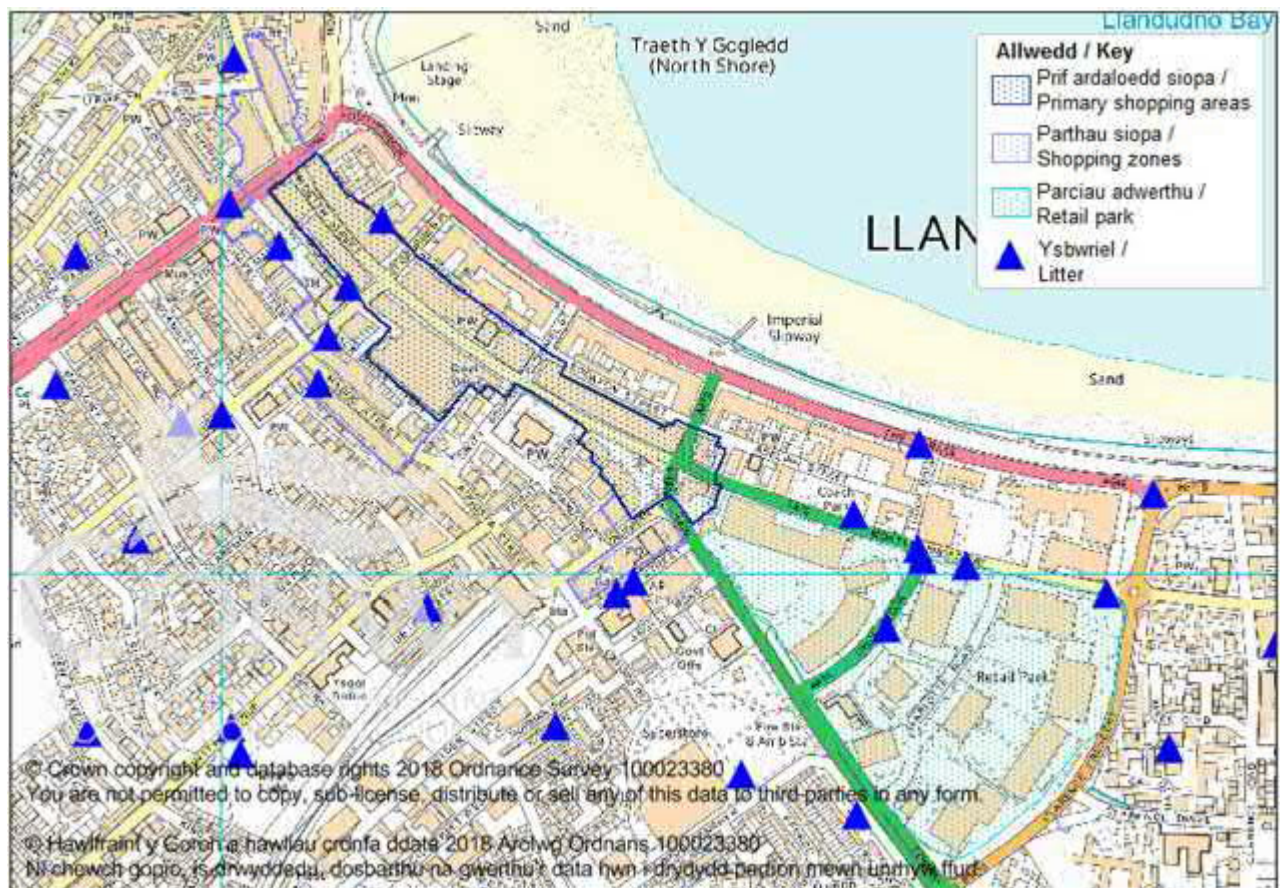
## 5.9 Natural and built environment

### Litter and graffiti

5.9.1 In 2017/18, there were five recorded incidents of littering in the LDP designated Primary Shopping Area and Shopping Zones of Llandudno and another five in the retail parks. There were additional incidents recorded nearby. Historical data is not available to make a comparison, however, this does seem a low number of littering incidents in the town centre. There were no recorded incidents of graffiti in the town centre.

#### Map 4: Litter incidents in Llandudno 2017/18

Source: Environment, Roads and Facilities, Conwy County Borough Council



## Greenery

- 5.9.2 The map below shows there are a significant number of mature trees within and in the area surrounding the LDP designated Primary Shopping Area and Shopping Zone in Llandudno.

### Map 5: Mature trees in Llandudno 2017/18

Source: Environment, Roads and Facilities, Conwy County Borough Council

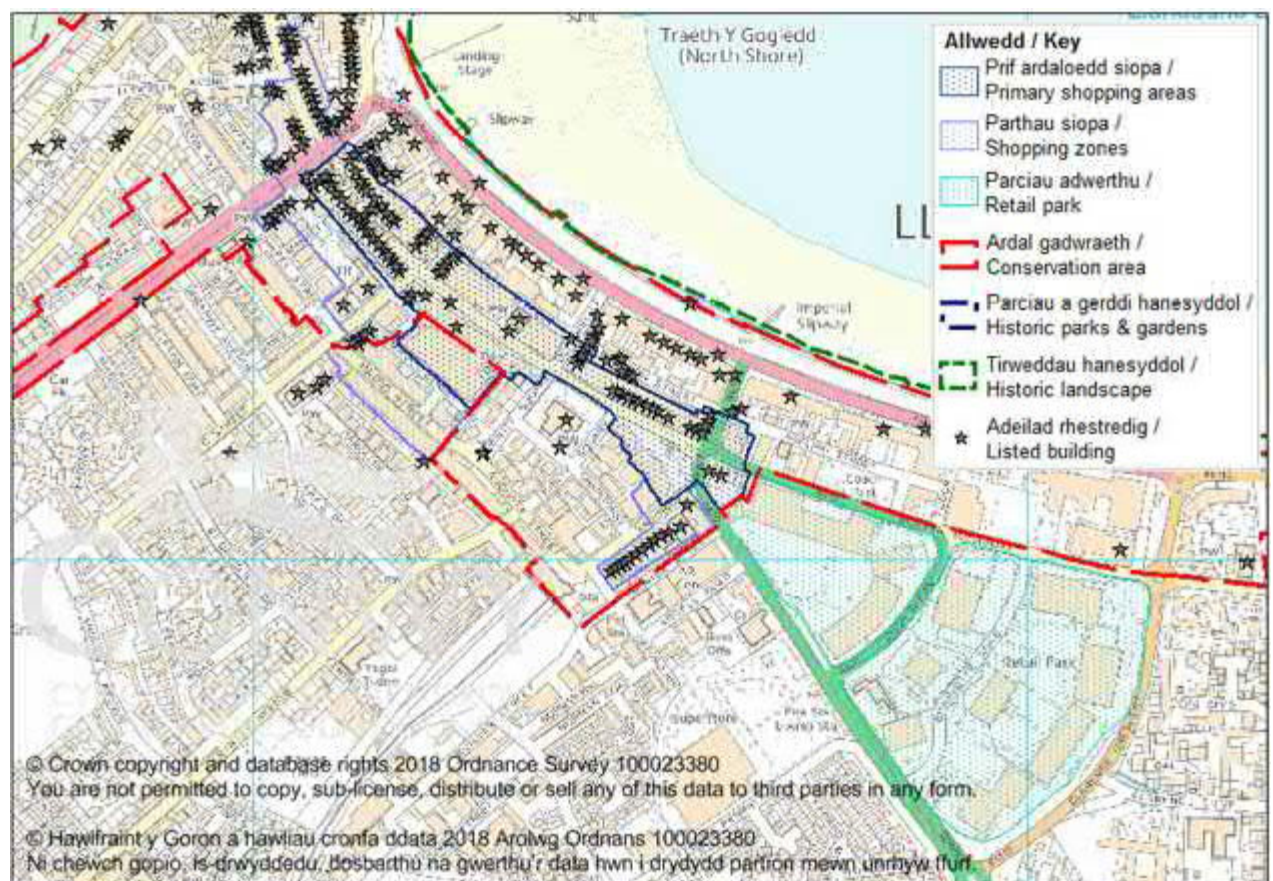


## Historic environment

- 5.9.3 The map below shows that there are many listed buildings in the town centre. They represent a key part of the County Borough's built heritage. It also shows the boundary of the designated Conservation Area and Historic Landscape. The Conservation Area has distinct key characteristics. These historic designations contribute towards the unique identity of Llandudno.

### Map 6: Historic designations in Llandudno 2017/18

Source: Environment, Roads and Facilities, Conwy County Borough Council

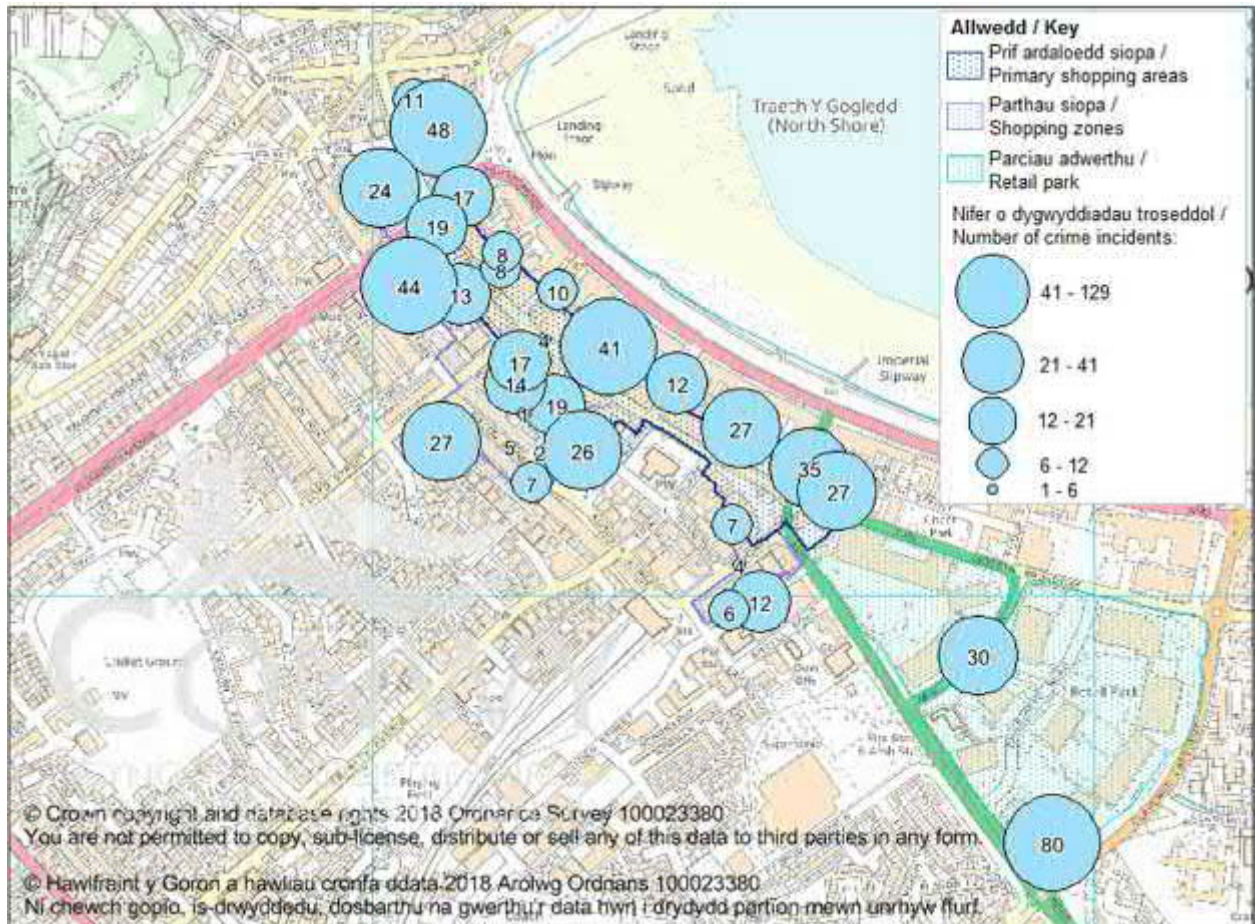


## 5.10 Crime and safety

5.10.1 There were 605 recorded crime incidents in Llandudno town centre in 2017/18. The map below shows that there are certain hotspots, where there are higher incidences of crime. Further analysis over time in future will be required to monitor trends.

### Map 7: Crime incidents in Llandudno 2017/18

Source: Home Office [www.Police.UK](http://www.Police.UK) website, 2018



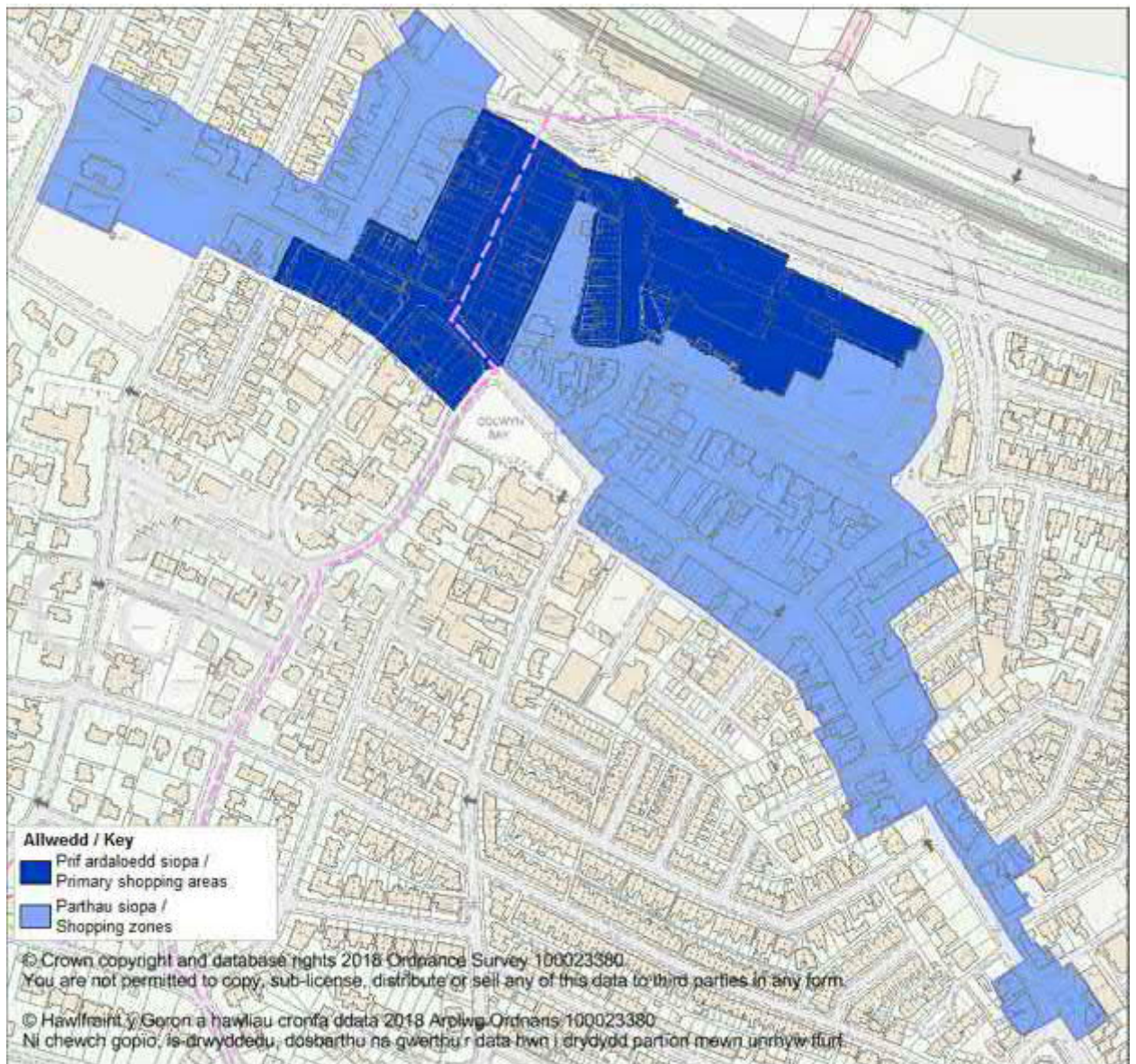
## 6 Colwyn Bay

### 6.1 General introduction

- 6.1.1 Colwyn Bay is defined in the LDP retail hierarchy as a town centre. LDP designations include a Primary Shopping Area and Shopping Zone. In 2017, there were 254 retail units in the town centre designations. It is the second largest centre in the LDP retail hierarchy.

#### Map 8: LDP retail designations in Colwyn Bay

Source: Conwy LDP 2007-2022



### 6.2 Use classes

- 6.2.1 There is a high level of A1 shops in the retail areas of Colwyn Bay at 72% overall. The levels are similar across both the LDP designated Primary Shopping Area and Shopping Zone. LDP and national policy seeks to secure a higher A1 percentage in the primary areas when compared with secondary areas. This suggests the boundaries of these

areas need reviewing, in order to protect the A1 retail function of the core area. The levels when compared with the national large and small towns average are higher. A2 (financial and professional services) uses is slightly lower than the national averages, particularly in the Primary Shopping Area. A3 (food and drink) is similar to the national large and small towns average. The level in the Primary Shopping Area is higher than in the Shopping Zone, which again suggests that the boundaries need reviewing.

**Table 18: Use classes in Colwyn Bay (2017)**

Source: Experian; CCBC site visits & Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	A1		A2		A3		A2 & A3		Hot food take away	
	No.	%	No.	%	No.	%	No.	%	No.	%
<b>National large towns average</b>		52%		13%		17%		30%		3%
<b>National small towns average</b>		52%		14%		16%		30%		4%
<b>Conwy County Borough*</b>		68%		12%		21%		32%		11%
<b>Colwyn Bay*</b>	184	72%	25	10%	45	18%	70	28%	14	6%
<b>Primary Shopping Area</b>	74	73%	8	8%	19	19%	27	27%	4	4%
<b>Shopping Zone</b>	110	72%	17	11%	26	17%	43	28%	10	7%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zone only.

- 6.2.2 Please see Appendix 2 for maps showing the distribution of use classes in the designated LDP areas.

**Table 19: Use classes over time in Colwyn Bay**

Source: Experian & CCBC site visits

	Year	A1		A2		A3		Non-A1		Hot food take away	
		No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	<b>523</b>	<b>66%</b>	<b>110</b>	<b>14%</b>	<b>164</b>	<b>21%</b>	<b>274</b>	<b>34%</b>	<b>44</b>	<b>6%</b>
	<b>2017</b>	<b>613</b>	<b>68%</b>	<b>107</b>	<b>12%</b>	<b>187</b>	<b>21%</b>	<b>294</b>	<b>32%</b>	<b>100</b>	<b>11%</b>
<b>Colwyn Bay*</b>	<b>2014</b>	149	70%	27	13%	37	17%	64	30%	14	7%
	<b>2017</b>	184	72%	25	10%	45	18%	70	28%	14	6%
<b>Primary Shopping Area</b>	<b>2014</b>	58	72%	9	11%	14	17%	23	28%	4	5%
	<b>2017</b>	74	73%	8	8%	19	19%	27	27%	4	4%
<b>Shopping Zone</b>	<b>2014</b>	91	69%	18	14%	23	17%	41	31%	10	8%
	<b>2017</b>	110	72%	17	11%	26	17%	43	28%	10	7%

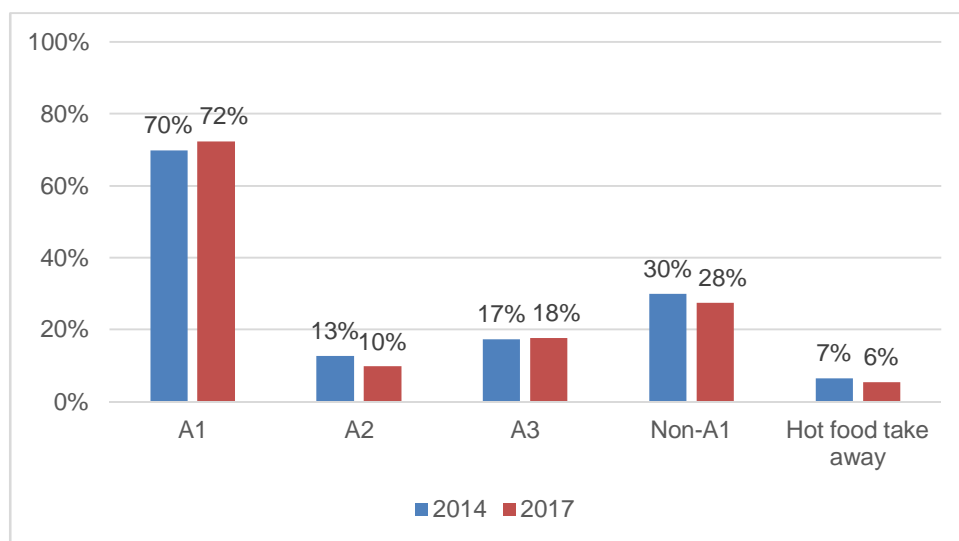
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 6.2.3 There has been a significant increase of 35 units in the number of A1 (shops) in Colwyn Bay between 2014 and 2017, although the percentage of A1 use overall has remained similar. There has been a small decline in the number of A2 (financial and professional services). The number of A3 (food and drink) units has increased by six. This reflects

national retailing trends, where demand for café type uses has increased. There has been no change in the number of hot food take away units in Colwyn Bay.

### Chart 5: Use classes over time in Colwyn Bay

Source: Experian & CCBC site visits



## 6.3 Retail sub-class

### Table 20: Retail sub-class in Colwyn Bay (2017)

Source: Experian & site visits

	Conwy County Borough	Colwyn Bay					
		Total		Primary Shopping Area		Shopping Zone	
		No	%	No	%	No	%
<b>All units**</b>	871	232		95		137	
<b>Convenience</b>	8%	12	5%	6	6%	6	4%
<b>Comparison</b>	40%	111	48%	52	55%	59	43%
<b>Service</b>	52%	109	47%	37	39%	72	53%
<b>Financial &amp; business services</b>	9%	20	9%	6	6%	14	10%
<b>Health &amp; medical services</b>	1%	4	2%	2	2%	2	1%
<b>Leisure services</b>	25%	52	22%	23	24%	29	21%
<b>Public services</b>	2%	4	2%	1	1%	3	2%
<b>Retail services</b>	14%	28	12%	5	5%	23	17%
<b>Vehicle &amp; transport services</b>	1%	1	0%	0	0%	1	1%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail. Does not include vacancies.

6.3.1 Colwyn Bay has a higher proportion of retail units selling comparison goods when compared to the County Borough, particularly in the Primary Shopping Area. This

highlights the town's function as a town centre and retail destination, and the second largest retail centre in the County Borough. The proportion of services is lower than the County Borough level for Colwyn Bay as a whole, but is similar in the Shopping Zone, which is to be expected and follows national retail policy recommendations for a variety of uses to be secured in these areas.

**Table 21: Retail sub-class over time in Colwyn Bay**

Source: Experian & site visits

	Year	Total units**	Convenience		Comparison		Service	
			No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	879		9%		40%		51%
	<b>2017</b>	871		8%		40%		52%
<b>Colwyn Bay*</b>	<b>2014</b>	228	15	7%	110	48%	103	45%
	<b>2017</b>	232	12	5%	111	48%	109	47%
<b>Primary Shopping Area</b>	<b>2014</b>	86	7	8%	46	53%	33	38%
	<b>2017</b>	95	6	6%	52	55%	37	39%
<b>Shopping Zone</b>	<b>2014</b>	142	8	6%	64	45%	70	49%
	<b>2017</b>	137	6	4%	59	43%	72	53%

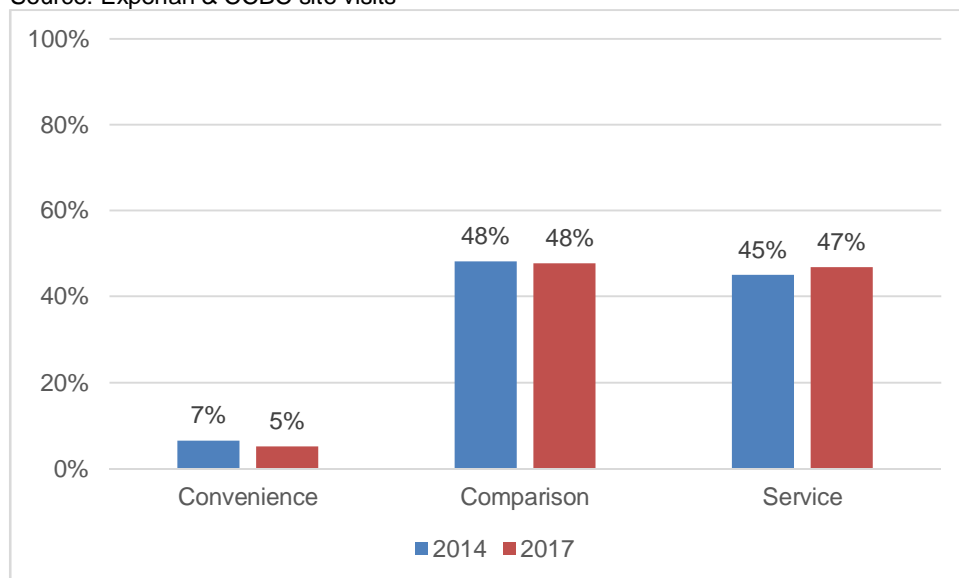
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail. Does not include vacancies.

- 6.3.2 The levels of retail sub-class has seen a small change since 2014 in Colwyn Bay, in both the Primary Shopping Area and Shopping Zones. The number of convenience units has decreased in both designations by three units overall. The number of comparison units has remained similar overall, but the Primary Shopping Area has seen an increase, whereas the Shopping Zone has seen a decrease. The number of service units has increased in both designations.

## Chart 6: Retail sub-class over time in Colwyn Bay

Source: Experian & CCBC site visits



## 6.4 Key attractors and multiple traders

### Table 22: Key attractors and multiple traders in Colwyn Bay (2017)

Source: Experian, Heart of our town report Colwyn Bay 2017 (People & Places Partnership) & CCBC site visits

	Conwy County Borough*	National average		Colwyn Bay					
		Large towns	Small Towns	Total*		Primary Shopping Area		Shopping Zone	
				No	%	No	%	No	%
<b>All A1 retail units**</b>	542			145		62		83	
<b>Key attractor</b>	4%	10%	7%	7	5%	7	11%	0	0%
<b>Multiple trader</b>	16%	25%	19%	26	18%	23	37%	3	4%
<b>Regional trader</b>	2%	10%	10%	1	1%	0	0%	1	1%
<b>Independent trader</b>	72%	56%	64%	103	71%	26	42%	77	93%
<b>Charity shops</b>	6%	-	-	8	6%	6	10%	2	2%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

- 6.4.1 Seven key attractor national retail brands are found in Colwyn Bay. This is a lower level than found nationally in large and small towns, but not much fewer than in Llandudno. There is also a large number of national multiple trader brands in Colwyn Bay, particularly in the Primary Shopping Area. This level is more comparable with the national average. This reflects Colwyn Bay's retail function as the second largest retail centre in the LDP. The Shopping Zone is made up mostly of independent traders, with a small number of charity shops and national multiple traders. This is a little unbalanced, but shows that the big names are drawn to the core retail centre, which is to be

expected. The level of independent traders overall is higher than the national averages, and indicates that Colwyn Bay has its own identity.

**Table 23: Key attractors and multiple traders over time in Colwyn Bay**

Source: Experian & CCBC site visits

	Year	Total A1**	Key attractor		Multiple trader		Regional trader		Independent trader		Charity	
			No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	538	21	4%	111	21%	5	1%	361	67%	40	7%
	<b>2017</b>	542	19	4%	88	16%	9	2%	391	72%	35	6%
<b>Colwyn Bay*</b>	<b>2014</b>	148	7	5%	32	22%	1	1%	98	66%	10	7%
	<b>2017</b>	145	7	5%	26	18%	1	1%	103	71%	8	6%
<b>Primary Shopping Area</b>	<b>2014</b>	58	7	12%	28	48%		0%	16	28%	7	12%
	<b>2017</b>	62	7	11%	23	37%		0%	26	42%	6	10%
<b>Shopping Zone</b>	<b>2014</b>	90		0%	4	4%	1	1%	82	91%	3	3%
	<b>2017</b>	83		0%	3	4%	1	1%	77	93%	2	2%

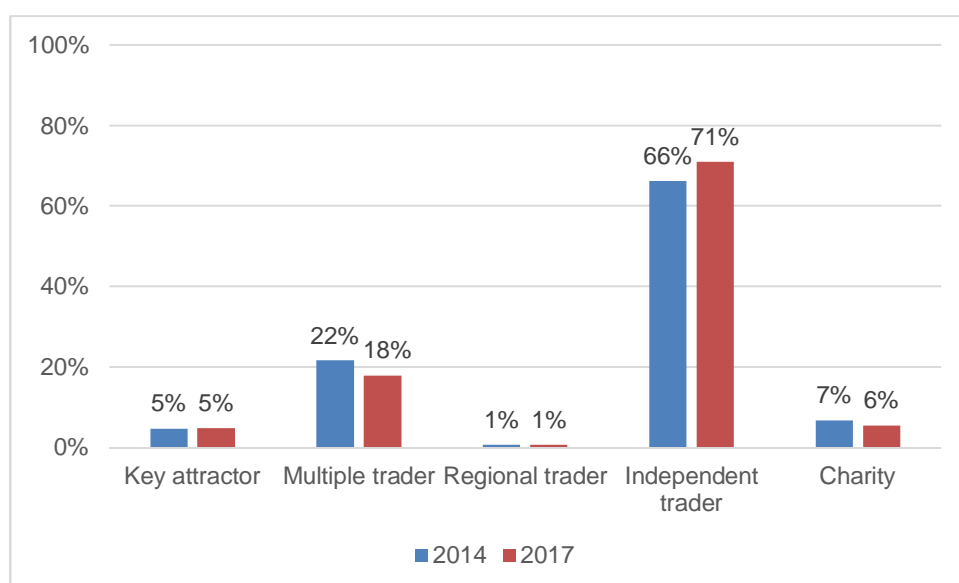
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

6.4.2 There has been some change in the balance between the larger national retail brands and local independent traders in Colwyn Bay since the LDP was adopted. The number of key attractors has remained the same. The number of multiple traders has decreased by six units overall. The majority of this is in the LDP designated Primary Shopping Area. The number of independent traders has increased overall by five units. The number in the Primary Shopping Area has increased by ten units, but the Shopping Zone has seen a decrease of five units. This could be due to businesses relocating to a better location, in the heart of the retail centre.

**Chart 7: Key attractors and multiple traders over time in Colwyn Bay**

Source: Experian & CCBC site visits



## 6.5 Accessibility

### Public transport

**Table 24: Trains serving Colwyn Bay (2018)**

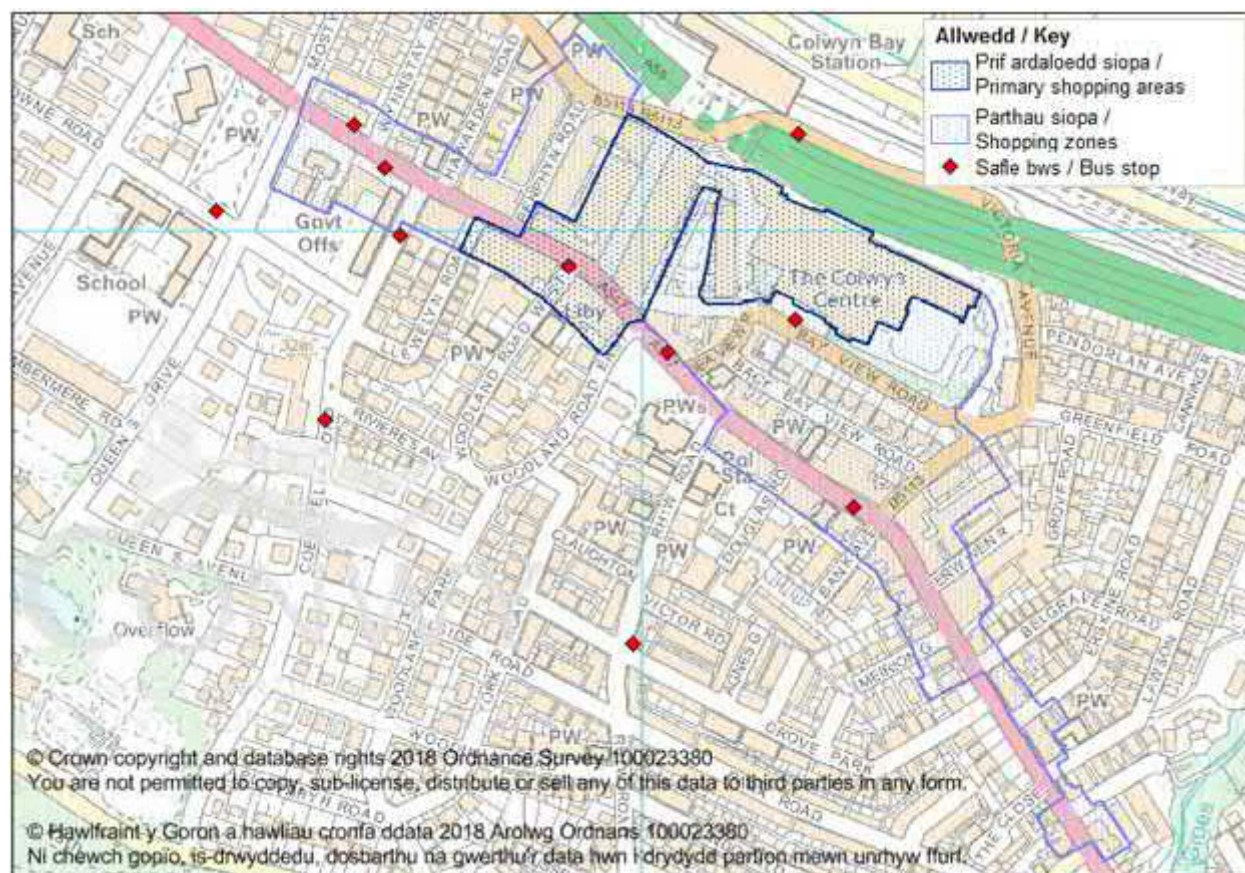
Source: Arriva Trains Wales

Route	Day	Inbound Journeys	Outbound Journeys	Total journeys per day
London - Birmingham - Crewe - Manchester - Chester - Holyhead	Monday-Friday	44	36	80
	Saturday	38	34	72
	Sunday*	16	20	36
Birmingham - Shrewsbury - Chester - Holyhead	Monday-Friday	14	14	28
	Saturday	14	14	28
	Sunday	3	3	6

- 6.5.1 Colwyn Bay train station is approximately 80 metres from the edge of the designated Primary Shopping Area. The station is very well served by trains Monday-Saturday, with fewer services on a Sunday.

**Map 9: Bus stops serving Colwyn Bay**

Source: Environment, Roads & Facilities, Conwy County Borough Council



- 6.5.2 There are seven bus stops in the designated LDP Primary Shopping Area and Shopping Zones of Colwyn Bay, with others nearby. The retail centre is very well served by a range of bus routes all days of the week, although there are fewer services on a Sunday.

**Table 25: Buses serving Colwyn Bay (2018)**

Source: Arriva

Main route	Service days	Inbound Journeys	Outbound Journeys	Total journeys per day
<b>Number 12</b>	Mon-Fri	71	71	142
Llandudno - Rhos-on-Sea - Colwyn Bay - Abergele - Towyn - Kinmel Bay - Rhyl	Sat	71	71	142
	Sun	38	38	76
<b>Number 13</b>	Mon-Fri	25	24	49
Llandudno - Mochdre - Colwyn Bay - Abergele - Prestatyn	Sat	25	24	49
	Sun	12	12	24
<b>Number 14/15</b>	Mon-Fri	25	26	51
Conwy - Deganwy - Llandudno - Rhos-on-Sea - Colwyn Bay - Llysfaen	Sat	25	25	50
	Sun	-	--	
<b>Number 21</b>	Mon-Fri	5	4	9
Abergele - Rhyd-y-Foel - Betws-yn-Rhos - Colwyn Bay	Sat	3	7	10
	Sun	-	-	-
<b>Number 23</b>	Mon-Fri	11	11	11
Old Colwyn - Colwyn Bay - Old Colwyn (circular service)	Sat	10	10	10
	Sun	-	-	-
<b>Number 27</b>	Mon-Fri	11	13	24
Conwy - Llandudno Junction - Mochdre - Colwyn Bay - Old Colwyn	Sat	11	13	24
	Sun	-	-	-

## Car parking

- 6.5.3 The data indicates that overall Colwyn Bay is a moderately easy place to find a parking space in during the week with 30% of spaces available on a busy day and 32% on a normal day. These figures are comparable with benchmarked towns nationally. Unlike footfall, parking usage does not show a significant difference on market day.
- 6.5.4 More detailed analysis would be required to examine how distribution around town matches users' needs. There is an indication that the availability of on-street parking is approaching a critical situation as it hovers just above the 15% vacancy rate which is widely considered as the minimum threshold.<sup>1</sup>

<sup>1</sup> Source: Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

**Table 26: car parking in Colwyn Bay (2017)**

Source: Heart of our town report Colwyn Bay 2017 (People &amp; Places Partnership)

	National large towns	National small towns	Colwyn Bay	
			Number	%
<b>All town centre parking</b>	-	-	<b>900</b>	<b>-</b>
Short stay spaces (4 hours and under)	47%	38%	371	41%
Long stay spaces (over 4 hours)	39%	53%	486	54%
Disabled spaces	4%	7%	43	5%
Vacant spaces (market day)	31%	31%	273	30%
Vacant spaces (quiet day)	36%	37%	286	32%
<b>Car parks</b>	<b>92%</b>	<b>84%</b>	<b>673</b>	<b>75%</b>
Short stay spaces (4 hours and under)	44%	29%	183	27%
Long stay spaces (over 4 hours)	42%	61%	451	67%
Disabled spaces	4%	7%	39	6%
Vacant spaces (market day)	32%	35%	222	33%
Vacant spaces (quiet day)	37%	40%	244	36%
<b>On street</b>	<b>8%</b>	<b>16%</b>	<b>227</b>	<b>25%</b>
Short stay spaces (4 hours and under)	85%	82%	188	83%
Long stay spaces (over 4 hours)	4%	12%	35	15%
Disabled spaces	10%	6%	4	2%
Vacant spaces (market day)	16%	15%	51	22%
Vacant spaces (quiet day)	18%	20%	42	19%

## 6.6 Pedestrian flows

- 6.6.1 The data indicates that Colwyn Bay is significantly busier than the national small towns average for market and non-market days. It also shows that pedestrians are circulating around other parts of the town.

**Table 27: pedestrian flows in Colwyn Bay (2017)**

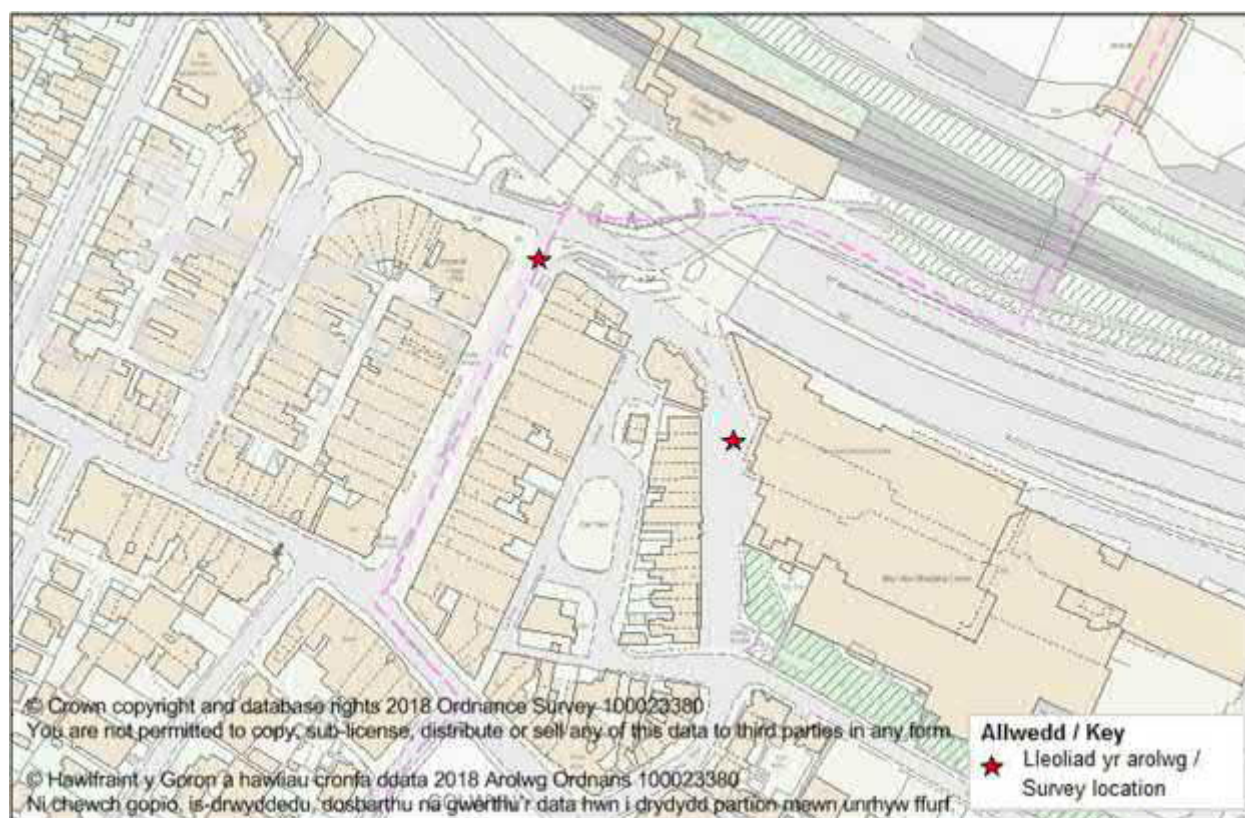
Source: CCBC site visits; Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	Site	National large towns average	National small towns average	Average for Colwyn Bay	Time		
					10:45-11:10	11:45-12:10	12:45-13:10
<b>Market day</b>	Bay View entrance	325	98	285	264	294	299
	Bottom of Station Road			251	287	213	253
<b>Non-market day</b>	Bay View entrance	239	86	204	197	190	226
	Bottom of Station Road			186	163	214	181

6.6.2 The location of the survey points is on the map below.

**Map 10: Location for pedestrian flows in Colwyn Bay**

Source: CCBC site visits; Heart of our town report Colwyn Bay (People & Places Partnership)



## 6.7 Vacancy rates

**Table 28: Vacancy rates in Colwyn Bay (2017)**

Source: Experian & site visits

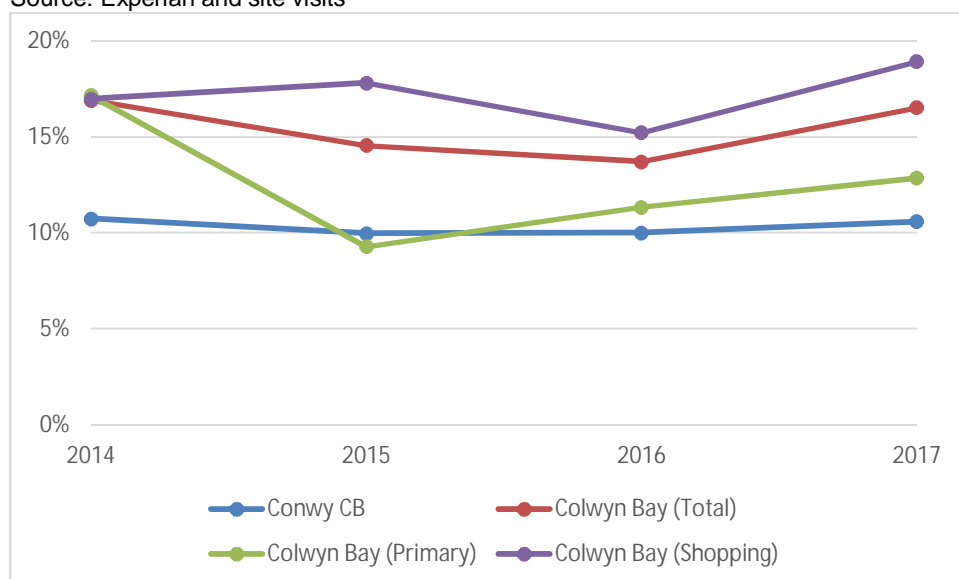
	Total number of retail units	Vacant	
		Number	%
<b>National large towns</b>	-	-	7%
<b>National small towns</b>	-	-	9%
<b>Conwy County Borough*</b>	907	96	11%
<b>Colwyn Bay*</b>	254	42	17%
<b>Primary Shopping Area</b>	101	13	13%
<b>Shopping Zone</b>	153	29	19%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 6.7.1 The vacancy rate in Colwyn Bay is high at 17%. The Shopping Zone in particular is high at 19%. Many of these units have been vacant since the survey in 2014. This will need monitoring in future, as long-term vacancies are a concern. Looking at vacancies since LDP adoption in 2013, there has been a small increase in the last 12 months. This will continue to be monitored.

**Chart 8: Vacancies over time in Colwyn Bay**

Source: Experian and site visits



## 6.8 Customer views

### Town centre business confidence survey

- 6.8.1 Questionnaires were distributed to all businesses operating in Colwyn Bay town centre. 24 returned the survey and the findings have been summarised in the table below. This is a good return rate for a survey of this type, however, results should be treated with some caution as the numbers are low.

**Table 29: Survey results for Colwyn Bay (2017)**

Source: Heart of our town report Colwyn Bay 2017 (People &amp; Places Partnership)

	National large towns average	National small towns average	Colwyn Bay	
			No.	%
<b>Nature of business?</b>				
Retail	56%	63%	18	75%
Financial services	14%	12%	2	8%
Public sector	1%	2%	0	0%
Food and drink	13%	13%	3	13%
Accommodation	1%	1%	0	0%
Other	15%	9%	1	4%
<b>Type of business?</b>				
Multiple trader	11%	0%	4	17%
Regional trader	11%	14%	1	4%
Independent trader	78%	86%	19	79%
<b>How long has your business been in the town?</b>				
Less than a year	4%	11%	1	4%
One to five years	27%	13%	5	21%
Six to ten years	9%	11%	0	0%
More than ten years	60%	44%	18	75%
<b>Compared to last year has your turnover...?</b>				
Increased	42%	33%	4	17%
Stayed the same	29%	11%	7	29%
Decreased	29%	44%	13	54%
<b>Compared to last year has your profitability...?</b>				
Increased	37%	43%	5	21%
Stayed the same	27%	29%	6	25%
Decreased	36%	29%	13	54%
<b>Over the next 12 months do you think your turnover will...?</b>				
Increase	43%	57%	4	17%
Stayed the same	36%	14%	6	26%
Decrease	21%	29%	13	57%

6.8.2 Of the businesses that responded to the survey, 75% were retailers of which 17% were national or regional multiples and 21% were independents. This is representative of the mix of business types in the town. 75% of the businesses are long-established in Colwyn Bay having been based there for more than six years.

6.8.3 In terms of recent business performance, 46% said that turnover had increased or stayed the same over the last year. This combined figure is comparable to the national average of 44% for small towns and is slightly improved on the previous year's figure (57%). The

proportion of Colwyn Bay businesses that had increased or maintained their profitability in the last 12 months was 36% and significantly lower than the national averages for small (71%) and large towns (66%) but is better than the previous year's figure for the town (35%).

6.8.4 Looking to the future, a reduced proportion of businesses (33%) expect turnover to go up or stay the same compared to the previous year (61%) and this is less than for both large (79%) and small (71%) towns nationally. Of concern is the fact that a significant proportion (57%) of Colwyn Bay town centre businesses surveyed expect profitability to continue to decrease in the year ahead. This is higher than towns nationally and seemingly year-on-year declines in performance suggest that this proportion of businesses may be particularly vulnerable to competition from elsewhere.

6.8.5 Crime incidents for business owners who responded in Colwyn Bay are higher (42%) than the national averages (36% large towns and 26% small towns).

**Table 30: Survey results for Colwyn Bay (2017)**

Source: Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	National large towns average	National small towns average	Colwyn Bay
<b>Has your business suffered from any crime over the last 12 months?</b>			
<b>Yes</b>	36%	26%	42%
<b>No</b>	64%	74%	58%

6.8.6 From the responses by businesses to the survey, potential local customers (75%) are considered the key positive of being located in Colwyn Bay. Retail mix (33%), transport links (29%), footfall (29%), and property costs (29%) are all perceived as positives by at least a quarter of businesses who responded. These are comparable with national averages.

6.8.7 In terms of negative perceptions about being located in Colwyn Bay town centre, a majority of businesses that responded considered empty properties (67%), parking (63%), physical appearance (50%) prosperity of the town (50%) to be key issues and these all compare unfavourably to town nationally.<sup>2</sup>

<sup>2</sup> Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

**Table 31: Survey results for Colwyn Bay (2017)**

Source: Heart of our town report Colwyn Bay 2017 (People &amp; Places Partnership)

	Positive aspects of being located in the town centre			Negative aspects of being located in the town centre		
	National large towns average	National small towns average	Colwyn Bay	National large towns average	National small towns average	Colwyn Bay
Physical appearance	44%	44%	17%	22%	22%	50%
Prosperity	39%	39%	0%	29%	29%	50%
Labour pool	-	-	-	14%	14%	13%
Location	-	39%	21%	-	-	0%
Retail offer	39%	40%	33%	7%	7%	8%
Vacant units	-	-	-	21%	21%	67%
Tourist customers	40%	36%	17%	41%	41%	8%
Local customers	36%	77%	75%	11%	11%	8%
Affordable housing	77%	15%	17%	3%	3%	4%
Transport links	15%	34%	29%	10%	10%	4%
Footfall	34%	-	29%	14%	14%	29%
Car parking	26%	32%	17%	20%	20%	63%
Rental values	32%	16%	29%	50%	50%	21%
Market	16%	14%	17%	-	-	4%
Events/ Activities	14%	22%	21%	40%	40%	50%
Marketing/ Promotions	22%	10%	0%	37%	37%	50%
Local Partnerships/ Organisations	10%	17%	0%	7%	7%	13%
Business competition	-	-	-	29%	29%	13%
Competition: other localities	-	-	-	10%	10%	8%
Competition: out of town shopping	-	-	-	17%	17%	33%
Competition: internet	-	-	-	25%	25%	17%
Other	17%	3%	21%	5%	5%	13%

### Town centre users survey

- 6.8.8 The responses from the town centre users indicate a sample from this mid-week survey that comprises evenly females males (50%) and nearly half (43%) over 65. This is significantly more elderly than in comparable towns. Most people are in town for convenience shopping (35%) which of course includes visits to Morrisons for grocery shopping, as well as comparison shopping (25%). A high proportion (30%) visit Colwyn Bay daily or more than once a week (50%) suggesting a core of loyal town centre users.

**Table 32: Survey results for Colwyn Bay (2017)**

Source: Heart of our town report Colwyn Bay 2017 (People &amp; Places Partnership)

	National large towns average	National small towns average	Colwyn Bay	
			No.	%
<b>Gender</b>				
Male	35%	32%	50	50%
Female	65%	67%	50	50%
<b>Age</b>				
16-25	8%	7%	7	7%
26-35	18%	15%	6	6%
36-45	22%	24%	15	5%
46-55	20%	22%	18	18%
56-65	16%	16%	17	17%
Over 65	16%	14%	43	43%
<b>What do you generally visit the town centre for?</b>				
Work	11%	10%	11	11%
Convenience shopping	40%	43%	35	35%
Comparison shopping	9%	6%	25	25%
Access services	19%	19%	17	17%
Leisure	13%	11%	8	8%
Other	9%	11%	3	3%
<b>How often do you visit the town centre?</b>				
Daily	19%	21%	30	30%
More than once a week	37%	35%	50	50%
Weekly	21%	21%	8	8%
Fortnightly	7%	7%	1	1%
More than once a month	6%	6%	2	2%
Once a month or less	9%	10%	5	5%
First visit	-	-	3	3%
<b>Where have you travelled from?</b>				
Locally (within the town)	58%	66%	64	64%
Visitors (postcode within 30 mins drive away)	23%	27%	27	27%
Tourists (postcode further than 30 mins drive away)	19%	7%	8	8%

6.8.9 27% of town centre users spend more than £20 on a visit to the town centre and this is comparable to small towns nationally (29%).<sup>3</sup>

<sup>3</sup> Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

**Table 33: Survey results for Colwyn Bay (2017)**

Source: Heart of our town report Colwyn Bay 2017 (People &amp; Places Partnership)

	National large towns average	National small towns average	Colwyn Bay	
			No.	%
<b>How do you normally travel to the town centre?</b>				
On foot	31%	31%	31	31%
Bicycle	1%	1%	0	0%
Car	58%	62%	55	55%
Bus	7%	4%	10	10%
Train	0%	0%	0	0%
Other	2%	2%	3	3%
<b>How much do you normally spend?</b>				
Nothing	3%	3%	6	6%
£0.01-£5.00	9%	11%	22	22%
£5.01-£10.00	19%	23%	19	19%
£10.01-£20.00	30%	32%	25	25%
£20.01-£50.00	28%	24%	12	12%
More than £50.00	10%	5%	15	15%
<b>How long do you stay in the town centre?</b>				
Less than an hour	-	41%	17	17%
1-2 hours	-	41%	42	42%
2-4 hours	--	10%	25	25%
4-6 hours	-	2%	3	3%
All day	-	4%	11	11%
<b>Would you recommend a visit to the town centre?</b>				
Yes	-	59%	74	74%
No	-	41%	25	25%

6.8.10 When asked about the positive aspects of Colwyn Bay town centre, its users are markedly more positive than businesses: Ease of walking around the town centre (93%); access to services (87%); convenience (89%); customer service (86%); transport links (82%); safety (77%); cafes/restaurants (72%) were again given a positive response by over two-thirds of respondents. All of these levels of response compare very favourably with other towns nationally.

6.8.11 In terms of negatives, the responses from town centre users are much more moderate with only retail offer (43%) and physical appearance (36%) being rated poorly by more than a third of respondents.<sup>4</sup>

<sup>4</sup> Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

**Table 34: Survey results for Colwyn Bay (2017)**

Source: Heart of our town report Colwyn Bay 2017 (People &amp; Places Partnership)

	Positive aspects of being located in the town centre			Negative aspects of being located in the town centre		
	National large towns average	National small towns average	Colwyn Bay	National large towns average	National small towns average	Colwyn Bay
<b>Physical appearance</b>	37%	36%	47%	30%	37%	36%
<b>Cleanliness</b>	31%	35%	63%	31%	25%	21%
<b>Retail offer</b>	29%	19%	44%	42%	53%	43%
<b>Customer service</b>	23%	24%	86%	8%	9%	5%
<b>Cafes / restaurants</b>	29%	32%	72%	5%	20%	4%
<b>Access to services</b>	58%	56%	87%	5%	13%	5%
<b>Leisure facilities</b>	13%	10%	54%	9%	25%	6%
<b>Events/ Activities</b>	15%	14%	60%	9%	19%	10%
<b>Pubs / bars / nightclubs</b>	12%	20%	31%	10%	22%	12%
<b>Transport links</b>	21%	18%	82%	12%	15%	10%
<b>Ease of walking around town centre</b>	67%	56%	93%	5%	6%	5%
<b>Convenience e.g. Near where you live</b>	67%	64%	89%	5%	4%	7%
<b>Safety</b>	17%	18%	77%	7%	12%	16%
<b>Car parking</b>	28%	32%	57%	41%	39%	21%
<b>Markets</b>	43%	25%	61%	9%	25%	22%
<b>Other</b>	5%	7%	0%	17%	16%	0%

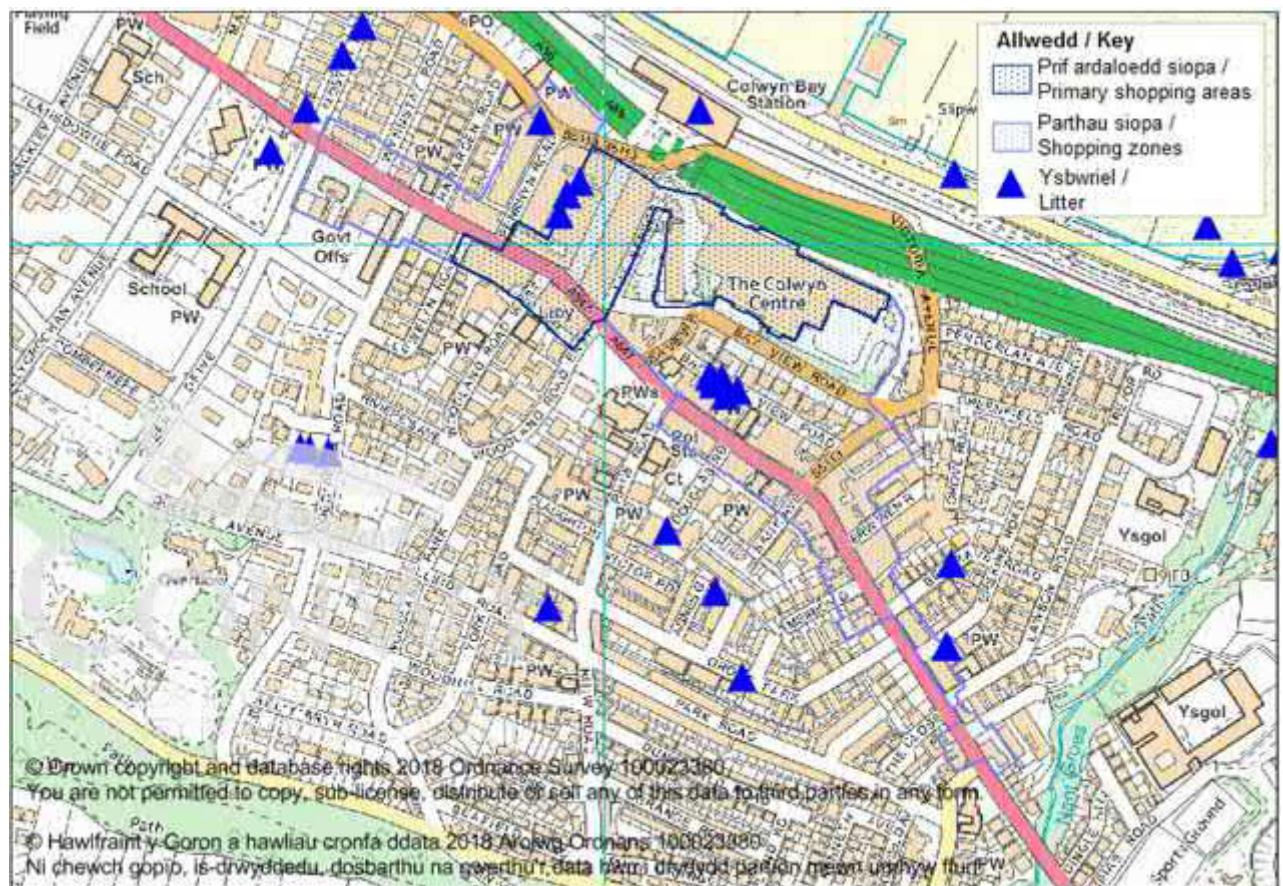
## 6.9 Natural and built environment

### Litter and graffiti

- 6.9.1 In 2017/18, there were twelve recorded incidents of littering in the LDP designated Primary Shopping Area and Shopping Zones of Colwyn Bay. There were additional incidents recorded nearby. Historical data is not available to make a comparison, however, this does seem a low number of littering incidents in the town centre. There were no recorded incidents of graffiti in the town centre.

#### Map 11: Litter incidents in Colwyn Bay 2017/18

Source: Environment, Roads and Facilities, Conwy County Borough Council

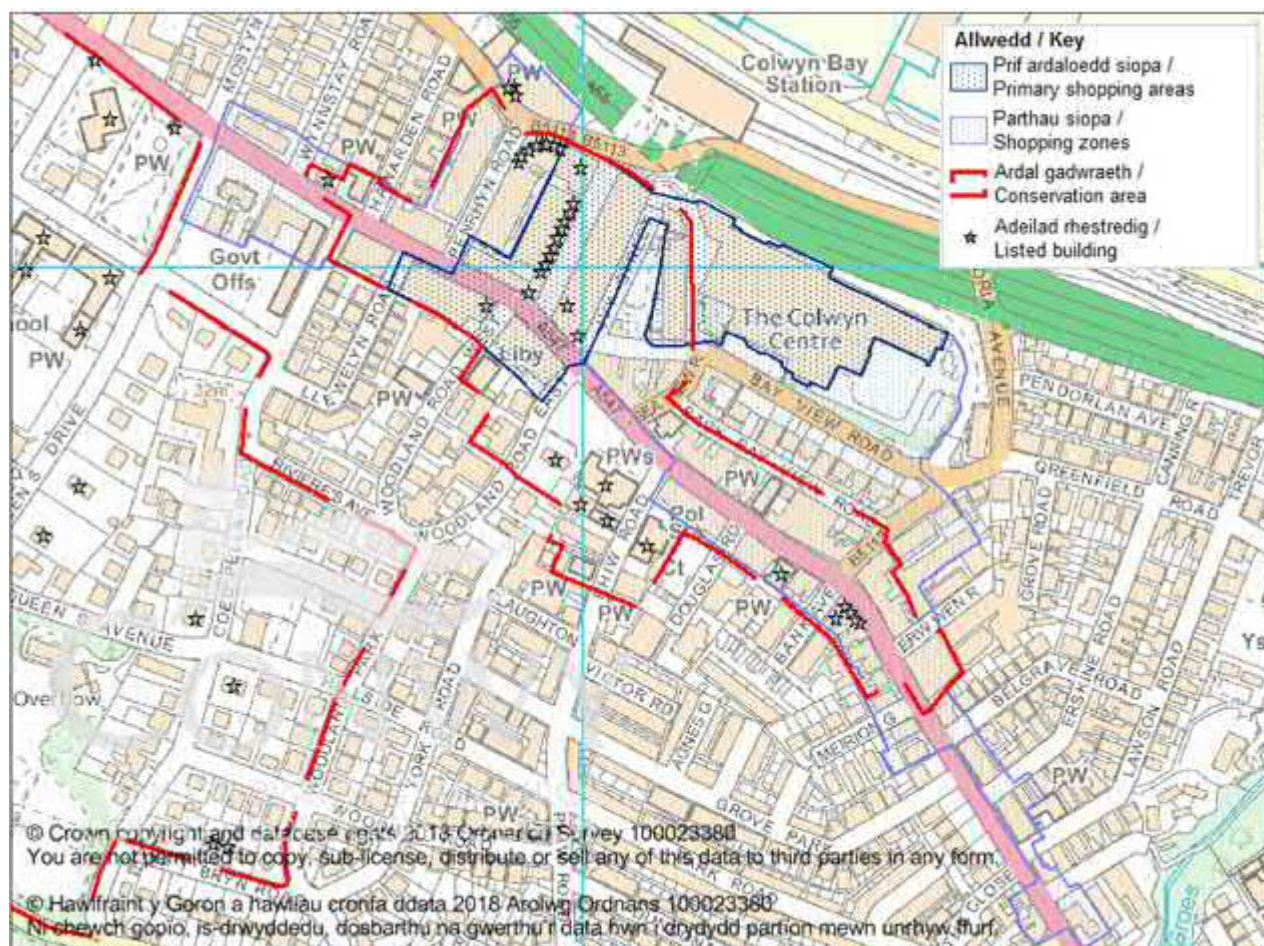


## Historic environment

- 6.9.2 The map below shows that there are listed buildings in the town centre, particularly along Station Road. It also shows the boundary of the designated Conservation Area. The Conservation Area is defined by a wide mix of building styles. Unfortunately many original street level shop fronts have been lost, but the upper floors are much more intact. These historic designations contribute towards the unique identity of Colwyn Bay.

### Map 12: Historic designations in Colwyn Bay 2017/18

Source: Environment, Roads and Facilities, Conwy County Borough Council

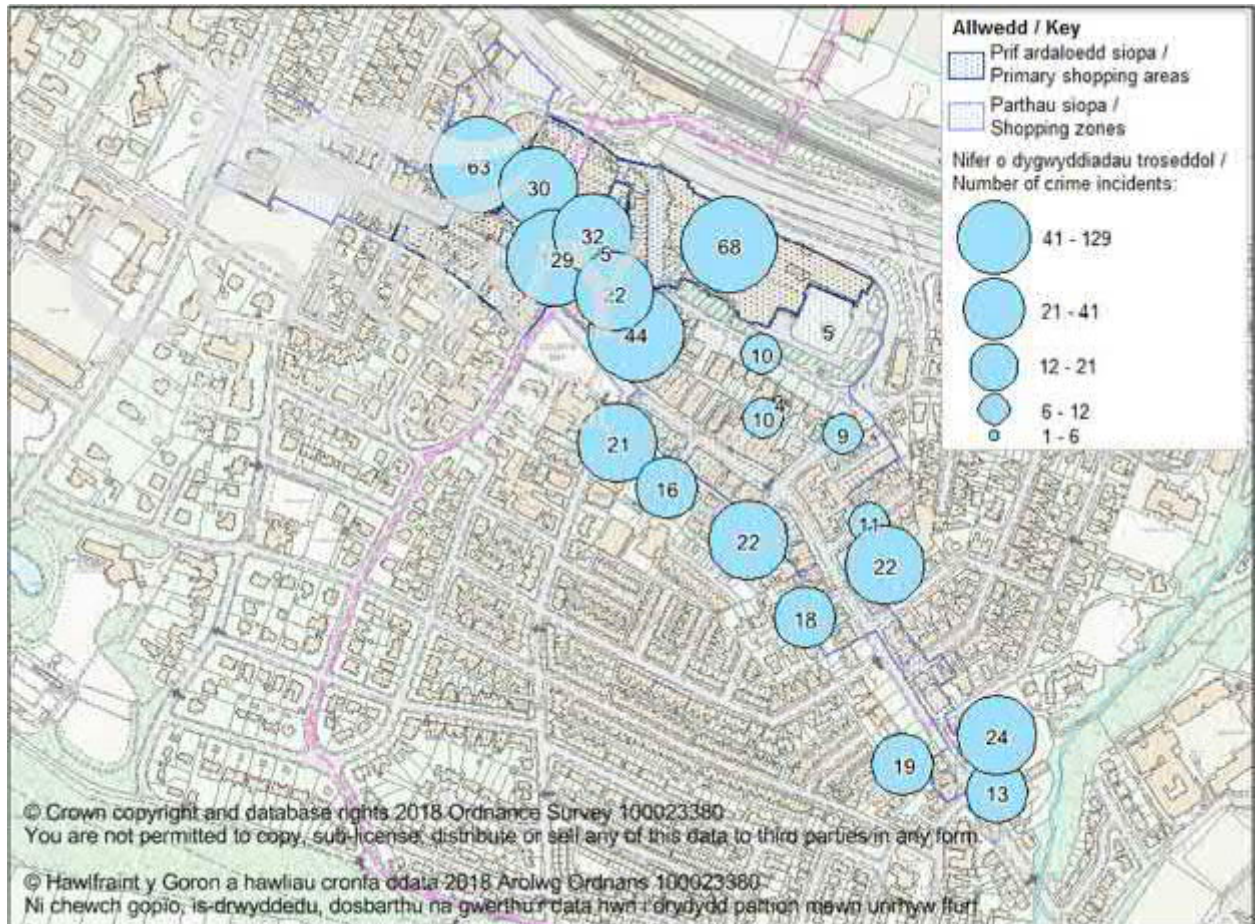


## 6.10 Crime and safety

6.10.1 There were 598 recorded crime incidents in Colwyn Bay town centre in 2017/18. The map below shows that there are certain hotspots, where there are higher incidences of crime. Further analysis over time in future will be required to monitor trends.

**Map 13: Crime incidents in Colwyn Bay 2017/18**

Source: Home Office [www.Police.UK](http://www.Police.UK) website, 2018



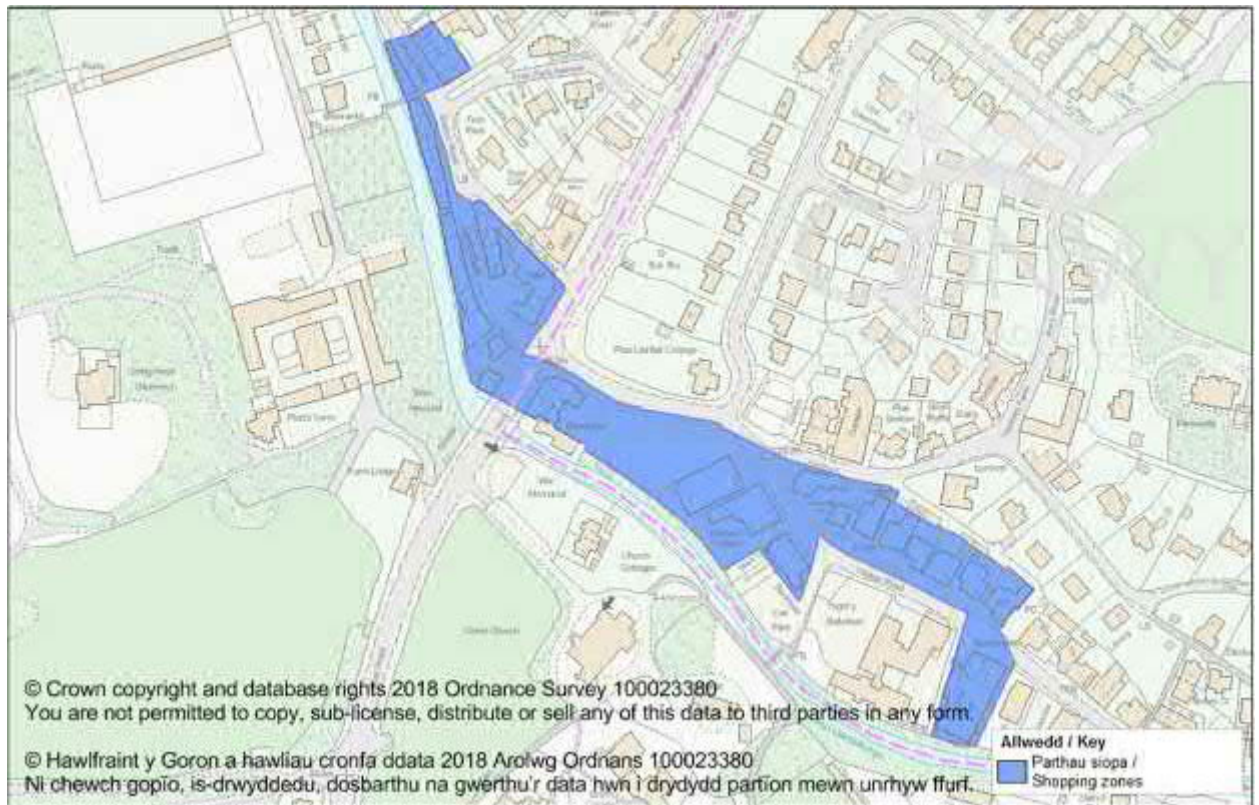
## 7 Llanfairfechan

### 7.1 General introduction

- 7.1.1 Llanfairfechan is defined in the LDP retail hierarchy as a town centre. LDP designations include a Shopping Zone. In 2017, there were 39 retail units in the town centre designation.

#### Map 14: LDP retail designations in Llanfairfechan

Source: Conwy LDP 2007-2022



### 7.2 Use classes

- 7.2.1 The level of A1 (shops) is very high in Llanfairfechan at 77%, when compared with the County Borough average and nationally. A2 (financial and professional services) use is similar to the level across the County Borough and nationally. A3 (food and drink) is much lower at only 10%. Providing a mix of uses in retail centres is a key objective of national policy. The mix at Llanfairfechan is a little unbalanced. Hot food take away is higher than the national averages, but lower than across the County Borough.

**Table 35: Use Classes in Llanfairfechan (2017)**

Source: Experian; CCBC site visits & Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	A1		A2		A3		A2 & A3		Hot food take away	
	No.	%	No.	%	No.	%	No.	%	No.	%
<b>National large towns average</b>		52%		13%		17%		30%		3%
<b>National small towns average</b>		52%		14%		16%		30%		4%
<b>Conwy County Borough*</b>		68%		12%		21%		32%		11%
<b>Llanfairfechan Shopping Zone</b>	30	77%	5	13%	4	10%	9	23%	3	8%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 7.2.2 Please see Appendix 2 for maps showing the distribution of use classes in the designated LDP areas.

**Table 36: Use classes over time in Llanfairfechan**

Source: Experian & CCBC site visits

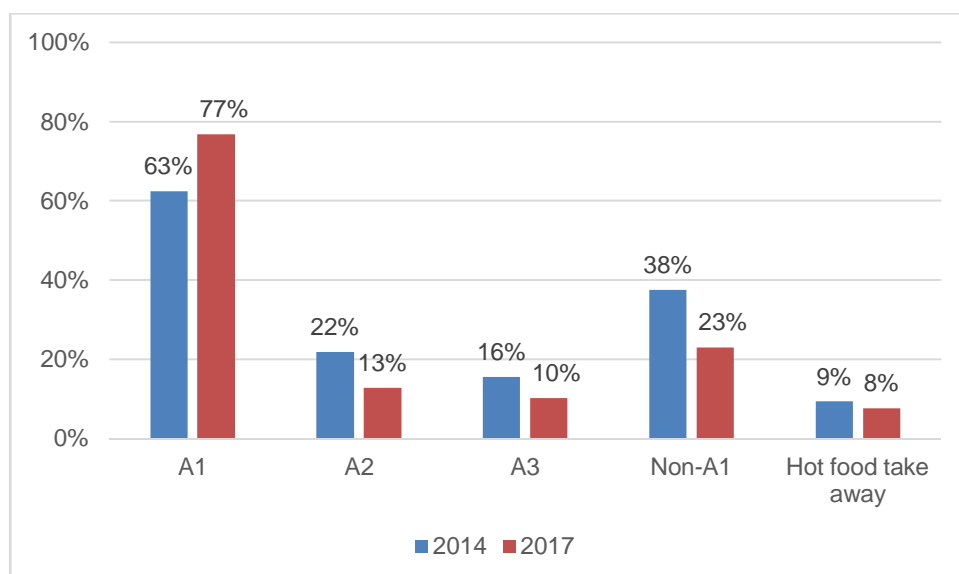
	Year	A1		A2		A3		Non-A1		Hot food take away	
		No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	523	66%	110	14%	164	21%	274	34%	44	6%
	<b>2017</b>	613	68%	107	12%	187	21%	294	32%	100	11%
<b>Llanfairfechan Shopping Zone</b>	<b>2014</b>	20	63%	7	22%	5	16%	12	38%	3	9%
	<b>2017</b>	30	77%	5	13%	4	10%	9	23%	3	8%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 7.2.3 There has been a significant increase in the number of A1 (shops) in Llanfairfechan between 2014 and 2017, which is reflected in the percentage change. The level of A2 (financial and professional services) and A3 (food and drink) have both decreased. There has been no change in the number of hot food take away units in Llanfairfechan.

### Chart 9: Use classes over time in Llanfairfechan

Source: Experian & CCBC site visits



## 7.3 Retail sub-class

### Table 37: Retail sub-class in Llanfairfechan (2017)

Source: Experian & site visits

	Conwy County Borough*	Llanfairfechan Shopping Zone	
		No	%
<b>All units**</b>	871	39	
<b>Convenience</b>	8%	5	13%
<b>Comparison</b>	40%	13	33%
<b>Service</b>	52%	21	54%
<b>Financial &amp; business services</b>	9%	6	15%
<b>Health &amp; medical services</b>	1%	0	0%
<b>Leisure services</b>	25%	6	15%
<b>Public services</b>	2%	1	3%
<b>Retail services</b>	14%	8	21%
<b>Vehicle &amp; transport services</b>	1%	0	0%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail. Does not include vacancies.

- 7.3.1 Llanfairfechan has a relatively low level of comparison units when compared with the County Borough average. This is to be expected, as residents are likely to travel to larger centres for comparison goods. It has a higher level of convenience and service units than the County Borough average. This indicates that there is a good range of sub-class in this retail centre which is encouraged by national retail policy.

**Table 38: Retail sub-class over time in Llanfairfechan**

Source: Experian &amp; site visits

	Year	Total units**	Convenience		Comparison		Service	
			No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	879		9%		40%		51%
	<b>2017</b>	871		8%		40%		52%
<b>Llanfairfechan Shopping Zone</b>	<b>2014</b>	34	6	18%	8	24%	20	59%
	<b>2017</b>	39	5	13%	13	33%	21	54%

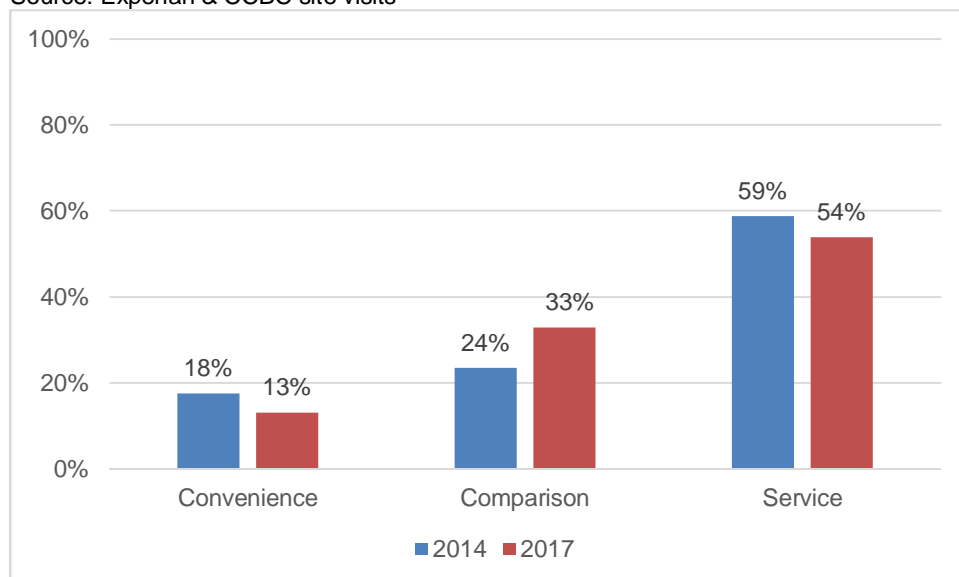
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail. Does not include vacancies.

- 7.3.2 The levels of retail sub-class has changed since 2014 in Llanfairfechan. Convenience has decreased by one unit, but comparison has seen an increase of five units, which is significant for a retail centre of this size. Service has seen an increase of one unit, but the overall level has decreased due to the overall increase in the number of units.

**Chart 10: Retail sub-class over time in Llanfairfechan**

Source: Experian &amp; CCBC site visits



## 7.4 Key attractors and multiple traders

**Table 39: Key attractors and multiple traders in Llanfairfechan (2017)**

Source: Experian, Heart of our town report Colwyn Bay 2017 (People & Places Partnership) & CCBC site visits

	Conwy County Borough*	National average		Llanfairfechan Shopping Zone	
		Large towns	Small Towns	No	%
<b>All A1 retail units*</b>	542			24	
<b>Key attractor</b>	4%	10%	7%	0	0%
<b>Multiple trader</b>	16%	25%	19%	2	8%
<b>Regional trader</b>	2%	10%	10%	0	0%
<b>Independent trader</b>	72%	56%	64%	20	83%
<b>Charity shops</b>	6%	-	-	2	8%

\*Does not include vacant units

- 7.4.1 Independent trader retail units form the majority of retail in Llanfairfechan, and is higher than the levels seen in the national averages. This contributes towards Llanfairfechan having a unique sense of character. There are two national multiple trader brands in Llanfairfechan, which is lower than the national averages, but does reflect the size of the retail centre.

**Table 40: Key attractors and multiple traders over time in Llanfairfechan**

Source: Experian & CCBC site visits

	Year	Total A1**	Key attractor		Multiple trader		Regional trader		Independent trader		Charity	
			No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	538	21	4%	111	21%	5	1%	361	67%	40	7%
	<b>2017</b>	542	19	4%	88	16%	9	2%	391	72%	35	6%
<b>Llanfairfechan Shopping Zone</b>	<b>2014</b>	20	0	0%	2	10%	0	0%	17	85%	1	5%
	<b>2017</b>	24	0	0%	2	8%	0	0%	20	83%	2	8%

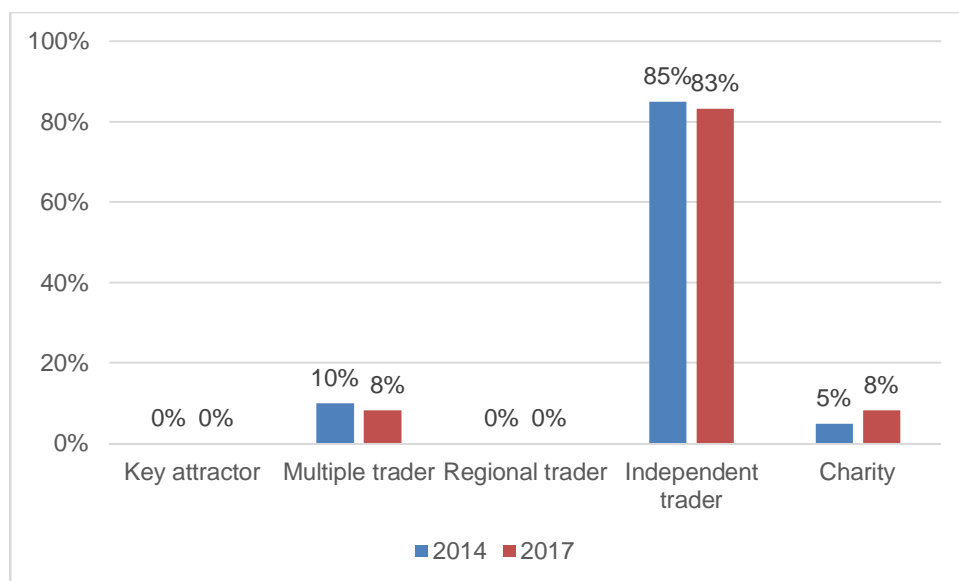
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

- 7.4.2 There has been a small change in the balance between the larger national retail brands and local independent traders in Llanfairfechan since the LDP was adopted. The number of multiple traders has remained the same, but the overall level has decreased. The number of independent traders has increased by three units and there is one more charity shop, which has seen the number of A1 (shops) units overall increase.

### Chart 11: Key attractors and multiple traders over time in Llanfairfechan

Source: Experian & CCBC site visits



## 7.5 Accessibility

### Public transport

#### Table 41: Trains serving Llanfairfechan (2018)

Source: Arriva Trains Wales

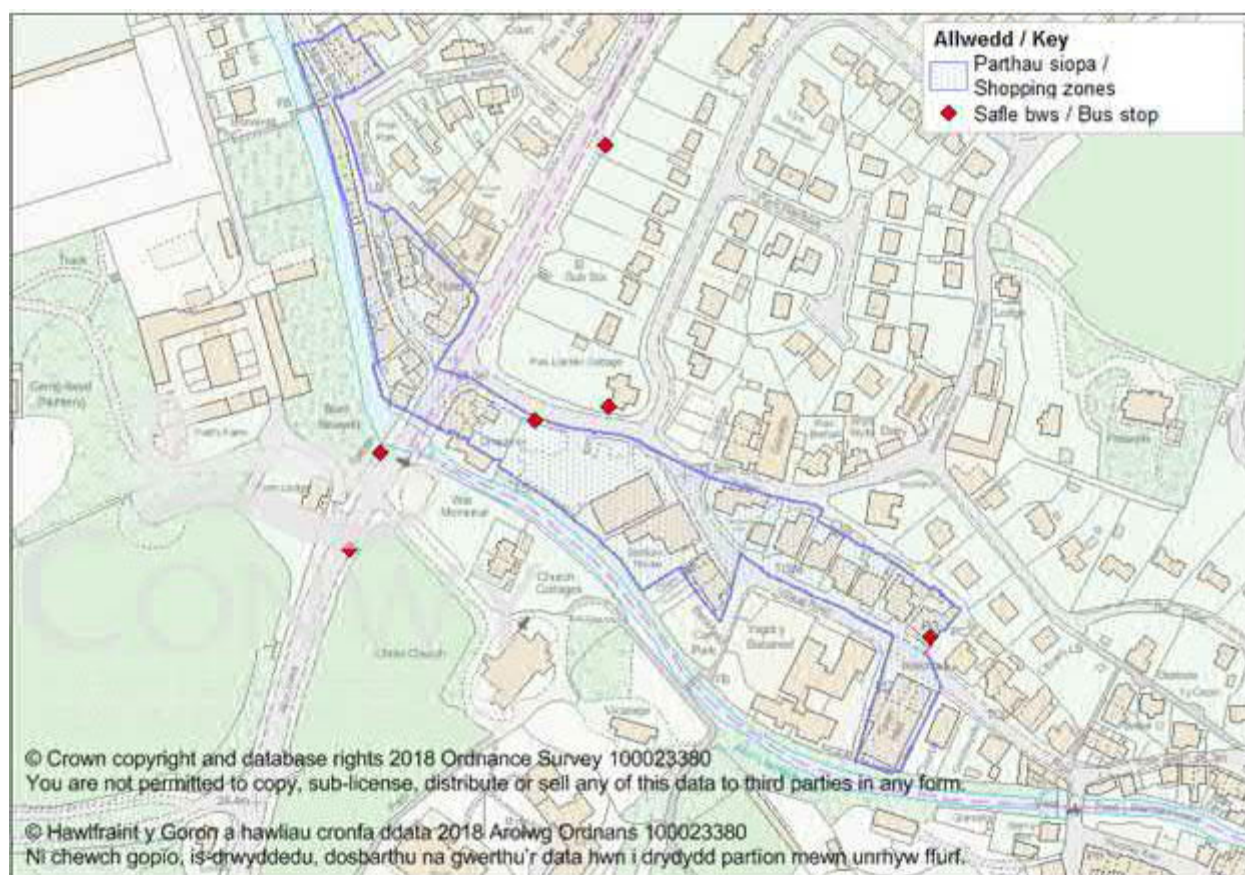
Route	Day	Inbound Journeys	Outbound Journeys	Total journeys per day
London - Birmingham - Crewe - Manchester - Chester - Holyhead*	Monday-Friday	11	13	24
	Saturday	12	11	23
	Sunday*	6	9	15

\*Llanfairfechan is a request stop

- 7.5.1 Llanfairfechan train station is 580 metres from the edge of the designated LDP Shopping Zone, and so likely to be too far for most shoppers. There are a regular number of services Monday-Saturday, with slightly fewer on a Sunday. Llanfairfechan is a request stop only.

### Map 15: Bus stops serving Llanfairfechan

Source: Environment, Roads & Facilities, Conwy County Borough Council



- 7.5.2 There are two bus stops in the designated LDP Shopping Zone of Llanfairfechan, with others nearby. The retail centre is well served by a range of bus routes all days of the week, although there are fewer services on a Sunday.

**Table 42: Buses serving Llanfairfechan (2018)**

Source: Arriva

Main route	Service days	Inbound Journeys	Outbound Journeys	Total journeys per day
<b>Number 5</b>	Mon-Fri	32	29	61
Bangor - Llanfairfechan - Penmaenmawr - Conwy - Llandudno Junction - Llandudno	Sat	31	28	59
	Sun	14	14	28
<b>Number 75</b>	Mon-Fri	2	2	4
Llandudno - Deganwy - Llandudno Junction - Conwy - Penmaenmawr - Llanfairfechan	Sat	2	2	4
	Sun	-	-	-
<b>Number X5</b>	Mon-Fri	22	24	46
Bangor - Llanfairfechan - Penmaenmawr - Conwy - Deganwy - Llandudno	Sat	19	22	41
	Sun	11	11	22

## 7.6 Vacancy rates

**Table 43: Vacancy rates in Llanfairfechan (2017)**

Source: Experian & site visits

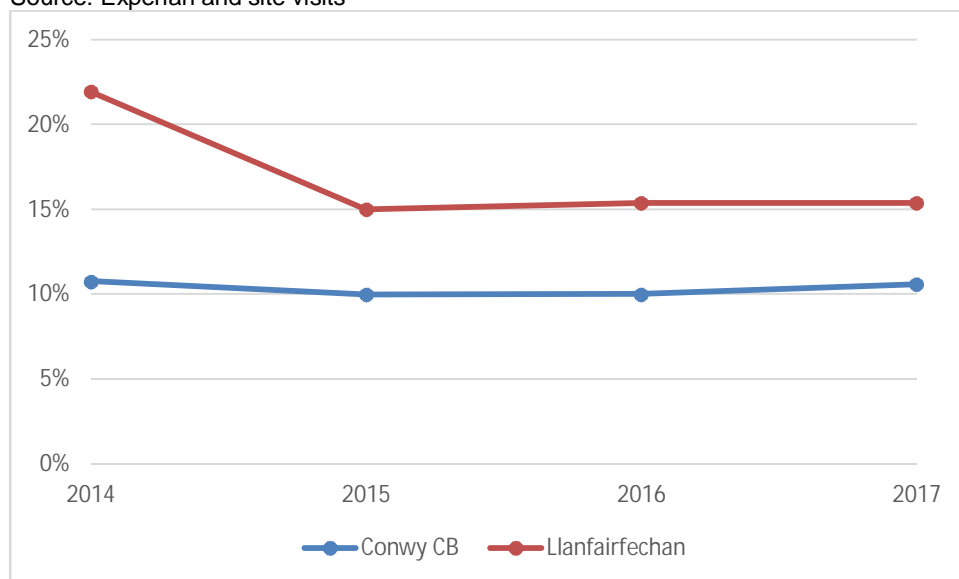
	Total number of retail units	Vacant	
		Number	%
<b>National large towns</b>	-	-	7%
<b>National small towns</b>	-	-	9%
<b>Conwy County Borough*</b>	907	96	11%
<b>Llanfairfechan Shopping Zone</b>	39	6	15%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 7.6.1 The vacancy rate in Llanfairfechan is high at 15%. Two of these were vacant for 12 months or more, which is a positive sign. Looking at vacancies since LDP adoption in 2013, there was a decline between 2014 and 2015, and numbers have remained level since. This needs to be continued to be monitored.

**Chart 12: Vacancies over time in Llanfairfechan**

Source: Experian and site visits



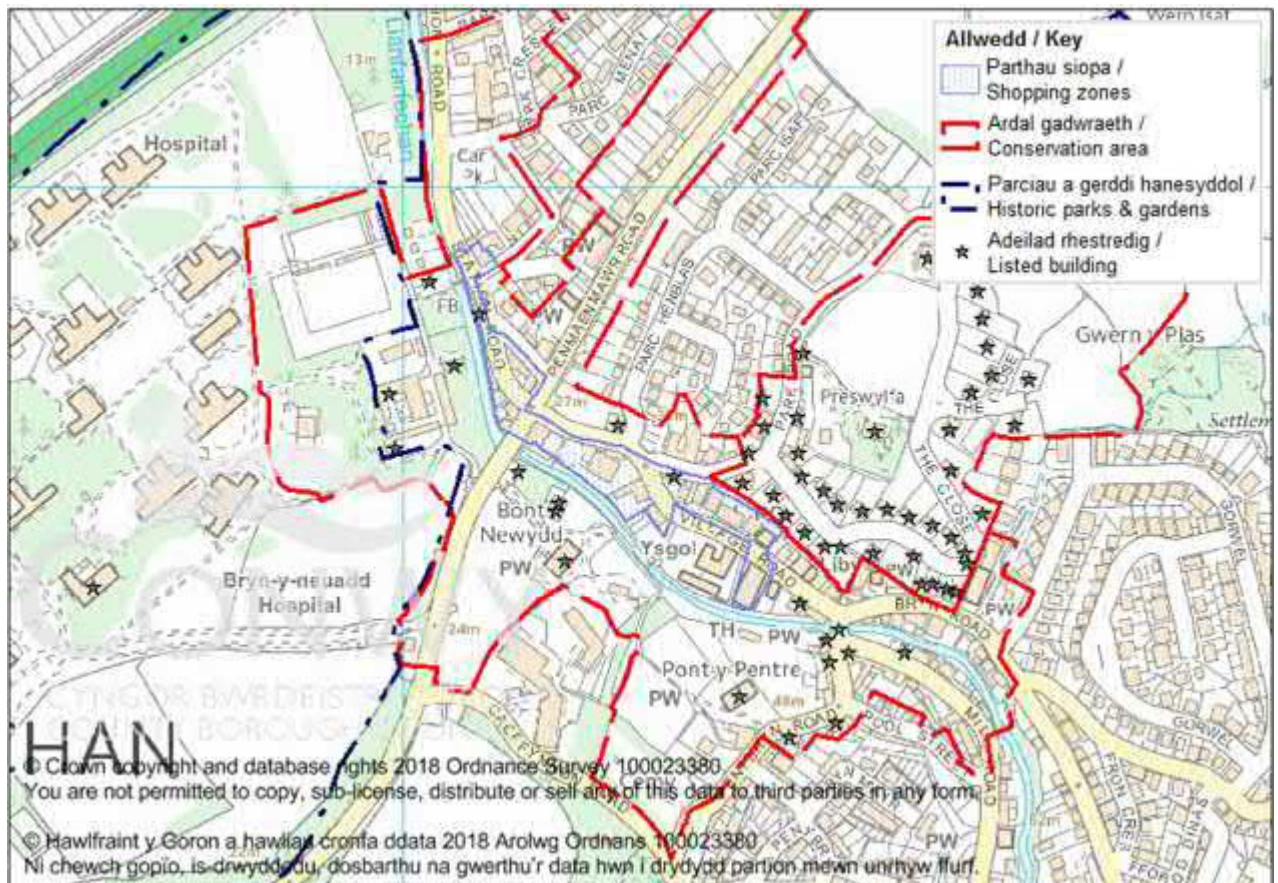
## 7.7 Natural and built environment

### Historic environment

- 7.7.1 The map below shows that there are many listed buildings adjacent to the town centre. It also shows the boundary of the designated Conservation Area and Historic Park and Garden of Bryn y Neuadd Hospital. The Conservation Area has a distinct key characteristics. These historic designations contribute towards the unique identity of Llanfairfechan.

#### Map 16: Historic designations in Llanfairfechan 2017/18

Source: Environment, Roads and Facilities, Conwy County Borough Council

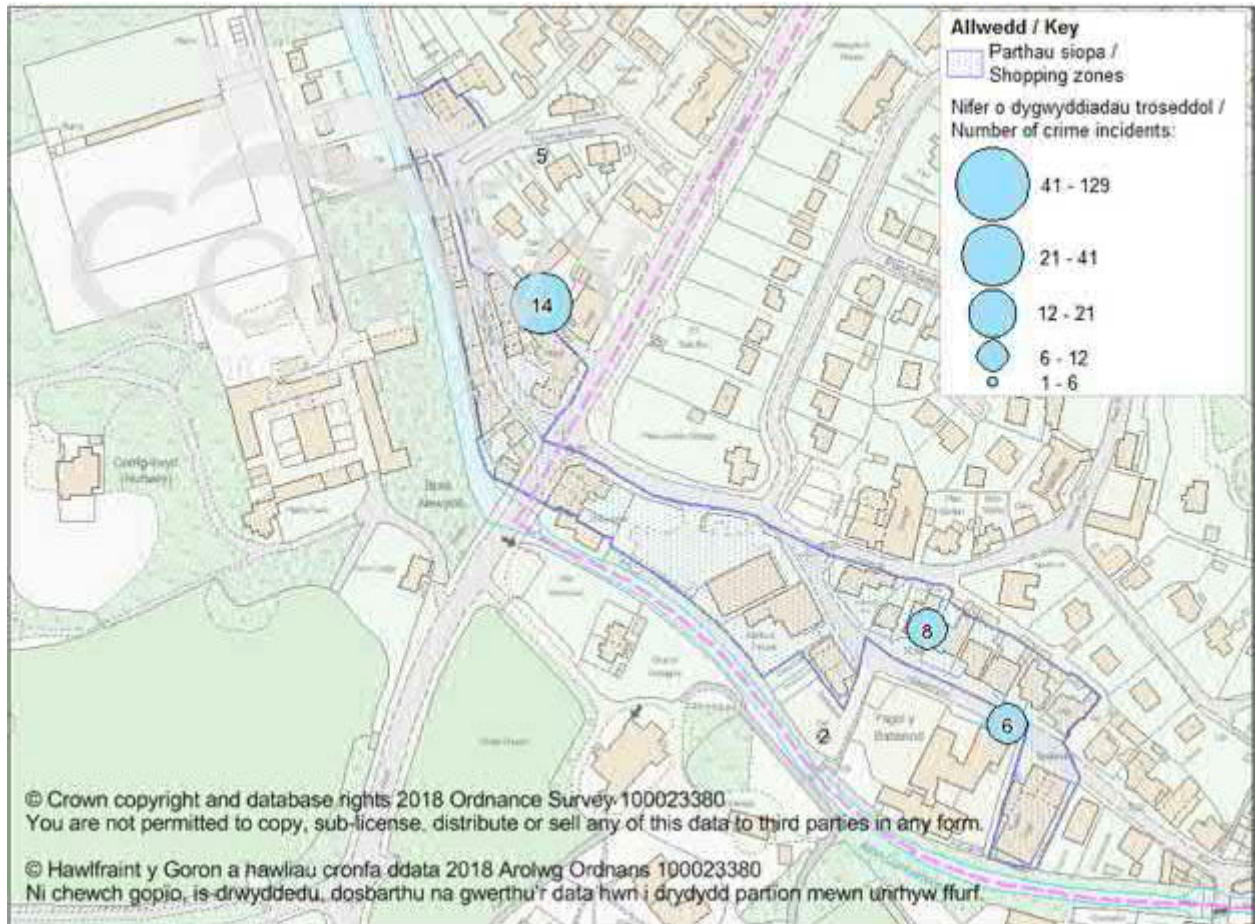


## 7.8 Crime and safety

- 7.8.1 There were 35 recorded crime incidents in the retail centre of Llanfairfechan in 2017/18. The map below shows that there are certain hotspots, where there are higher incidences of crime. Further analysis over time in future will be required to monitor trends.

**Map 17: Crime incidents in Llanfairfechan 2017/18**

Source: Home Office [www.Police.UK](http://www.Police.UK) website, 2018



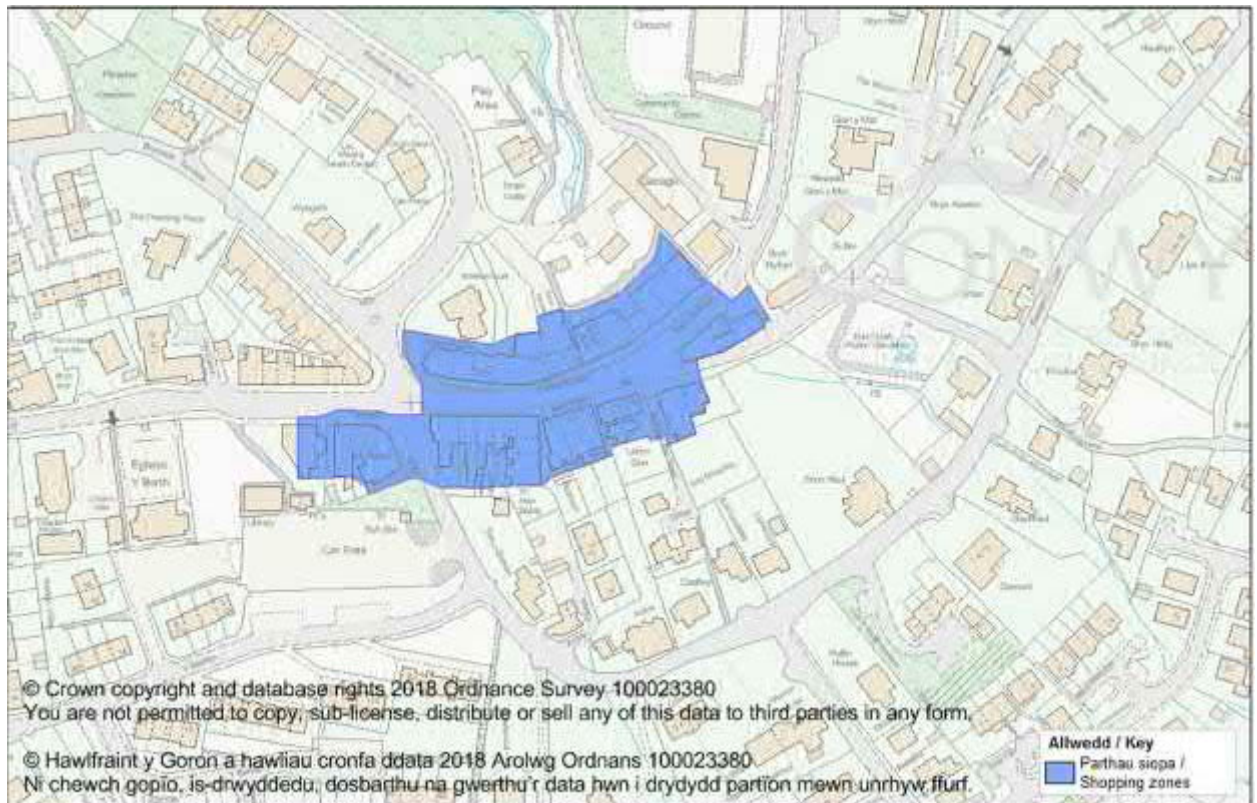
## 8 Penmaenmawr

### 8.1 General introduction

- 8.1.1 Penmaenmawr is defined in the LDP retail hierarchy as a town centre. LDP designations include a Shopping Zone. In 2017, there were 28 retail units in the town centre designation.

#### Map 18: LDP retail designations in Penmaenmawr

Source: Conwy LDP 2007-2022



### 8.2 Use classes

- 8.2.1 The level of A1 (shops) is similar in Penmaenmawr at 64% to the County Borough, and a little higher than the national towns averages. A2 (financial and professional services) use is similar to the level across the County Borough and nationally. A3 (food and drink) is higher than the County Borough level, and much higher than the national towns averages. Hot food take away is similar to the County Borough average, but higher than the national towns averages. It must be noted, however, that Penmaenmawr has only 28 retail units in total; therefore caution is needed when comparing percentages, as one unit can significantly skew the percentages.

**Table 44: Use Classes in Penmaenmawr (2017)**

Source: Experian; CCBC site visits & Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	A1		A2		A3		A2 & A3		Hot food take away	
	No.	%	No.	%	No.	%	No.	%	No.	%
<b>National large towns average</b>		52%		13%		17%		30%		3%
<b>National small towns average</b>		52%		14%		16%		30%		4%
<b>Conwy County Borough*</b>		68%		12%		21%		32%		11%
<b>Penmaenmawr Shopping Zone</b>	18	64%	3	11%	7	25%	10	36%	3	11%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 8.2.1 Please see Appendix 2 for maps showing the distribution of use classes in the designated LDP areas.

**Table 45: Use classes over time in Penmaenmawr**

Source: Experian & CCBC site visits

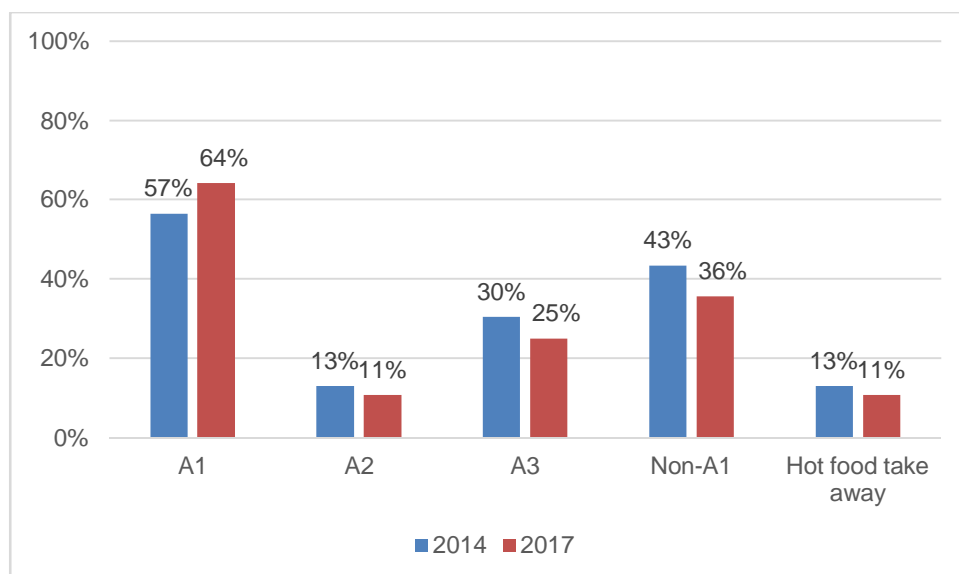
	Year	A1		A2		A3		Non-A1		Hot food take away	
		No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	523	66%	110	14%	164	21%	274	34%	44	6%
	<b>2017</b>	613	68%	107	12%	187	21%	294	32%	100	11%
<b>Penmaenmawr Shopping Zone</b>	<b>2014</b>	13	57%	3	13%	7	30%	10	43%	3	13%
	<b>2017</b>	18	64%	3	11%	7	25%	10	36%	3	11%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 8.2.2 The number of A1 (shops) has increased by five in Penmaenmawr between 2014 and 2017. This is a significant increase for a retail centre of this size. The number of A2 (financial and professional services) and A3 (food and drink) units has remained the same, although the percentage has decreased as a result of the A1 increase. There has been no change in the number of hot food take away units in Penmaenmawr.

### Chart 13: Use classes over time in Penmaenmawr

Source: Experian & CCBC site visits



## 8.3 Retail sub-class

**Table 46: Retail sub-class in Penmaenmawr (2017)**

Source: Experian & site visits

	Conwy County Borough*	Penmaenmawr Shopping Zone	
		No	%
<b>All units**</b>	871	30	
<b>Convenience</b>	8%	3	10%
<b>Comparison</b>	40%	8	27%
<b>Service</b>	52%	19	63%
<b>Financial &amp; business services</b>	9%	2	7%
<b>Health &amp; medical services</b>	1%	0	0%
<b>Leisure services</b>	25%	10	33%
<b>Public services</b>	2%	1	3%
<b>Retail services</b>	14%	6	20%
<b>Vehicle &amp; transport services</b>	1%	0	0%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail

- 8.3.1 Penmaenmawr has a low level of comparison units when compared with the County Borough average. This is to be expected, as residents are likely to travel to larger centres for comparison goods. It has a higher level of convenience and service units than the County Borough average. This indicates that there is a good range of sub-class in this retail centre which is encouraged by national retail policy.

**Table 47: Retail sub-class over time in Penmaenmawr**

Source: Experian &amp; site visits

	Year	Total units**	Convenience		Comparison		Service	
			No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	879		9%		40%		51%
	<b>2017</b>	871		8%		40%		52%
<b>Penmaenmawr Shopping Zone</b>	<b>2014</b>	26	3	12%	6	23%	17	65%
	<b>2017</b>	30	3	10%	8	27%	19	63%

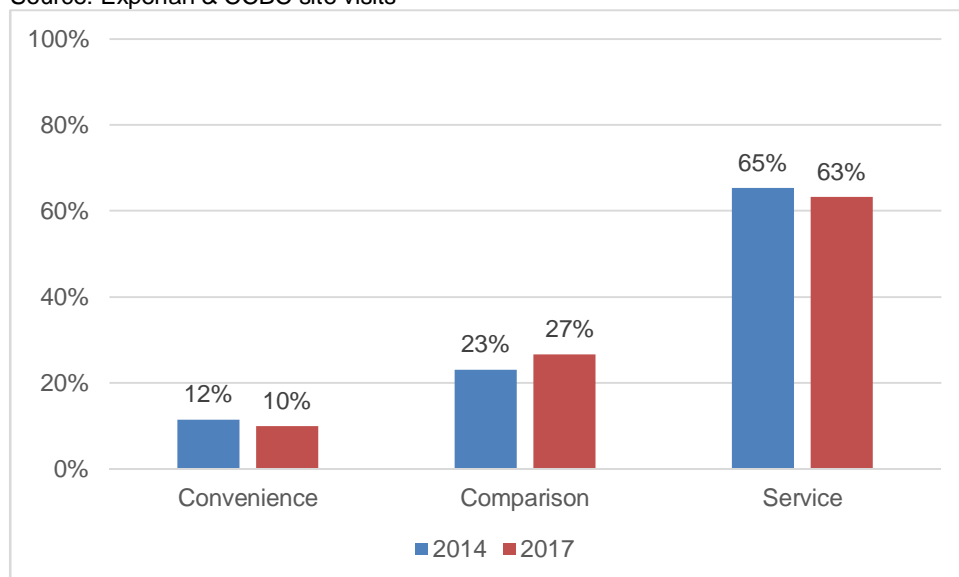
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail. Does not include vacancies.

- 8.3.2 The levels of retail sub-class has changed since 2014 in Penmaenmawr. The number of convenience units has remained the same, but changes elsewhere have meant that the overall level has decreased. The number of comparison and service units has increased by two units each.

**Chart 14: Retail sub-class over time in Penmaenmawr**

Source: Experian &amp; CCBC site visits



## 8.4 Key attractors and multiple traders

**Table 48: Key attractors and multiple traders in Penmaenmawr (2017)**

Source: Experian, Heart of our town report Colwyn Bay 2017 (People & Places Partnership) & CCBC site visits

	Conwy County Borough*	National average		Penmaenmawr Shopping Zone	
		Large towns	Small Towns	No	%
<b>All A1 retail units**</b>	542			18	
<b>Key attractor</b>	4%	10%	7%	0	0%
<b>Multiple trader</b>	16%	25%	19%	2	11%
<b>Regional trader</b>	2%	10%	10%	0	0%
<b>Independent trader</b>	72%	56%	64%	15	83%
<b>Charity shops</b>	6%	-	-	1	6%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

- 8.4.1 Independent trader retail units form the majority of retail in Penmaenmawr, and is higher than the levels seen in the national averages. This contributes towards Penmaenmawr having a unique sense of character. There are two national multiple trader brands, which is lower than the national averages, but does reflect the size of the retail centre.

**Table 49: Key attractors and multiple traders over time in Penmaenmawr**

Source: Experian & CCBC site visits

	Year	Total A1**	Key attractor		Multiple trader		Regional trader		Independent trader		Charity	
			No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	538	21	4%	111	21%	5	1%	361	67%	40	7%
	<b>2017</b>	542	19	4%	88	16%	9	2%	391	72%	35	6%
<b>Penmaenmawr Shopping Zone</b>	<b>2014</b>	13	0	0%	2	15%	0	0%	10	77%	1	8%
	<b>2017</b>	18	0	0	2	11%	0	0%	15	83%	1	6%

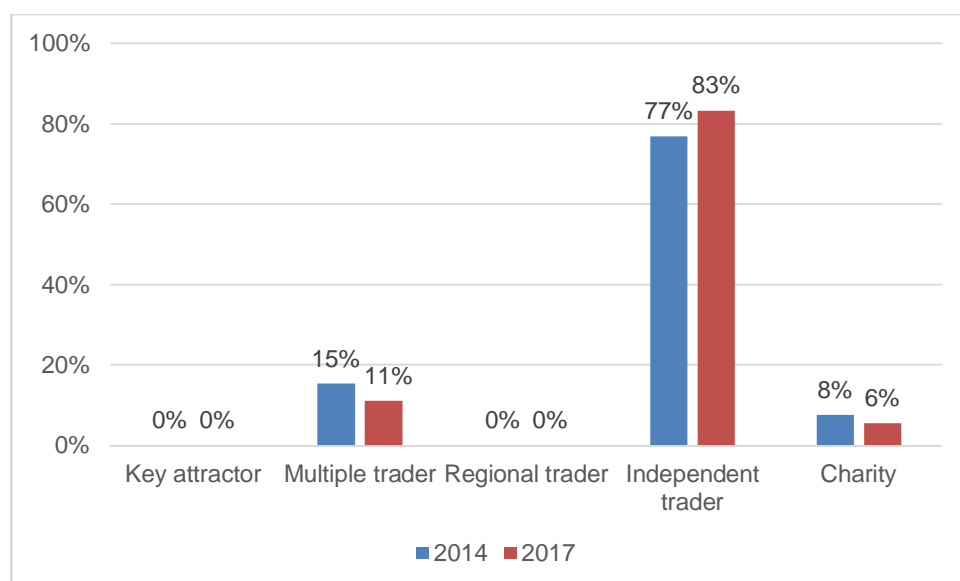
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

- 8.4.2 There has been some change in the balance between the larger national retail brands and local independent traders in Penmaenmawr since the LDP was adopted. The number of multiple traders has remained the same at two units, but the level of representation has decreased overall. The number of independent traders has increased by five units, which has resulted in the centre having more A1 units than previously.

**Chart 15: Key attractors and multiple traders over time in Penmaenmawr**

Source: Experian & CCBC site visits



## 8.5 Accessibility

### Public transport

**Table 50: Trains serving Penmaenmawr (2018)**

Source: Arriva Trains Wales

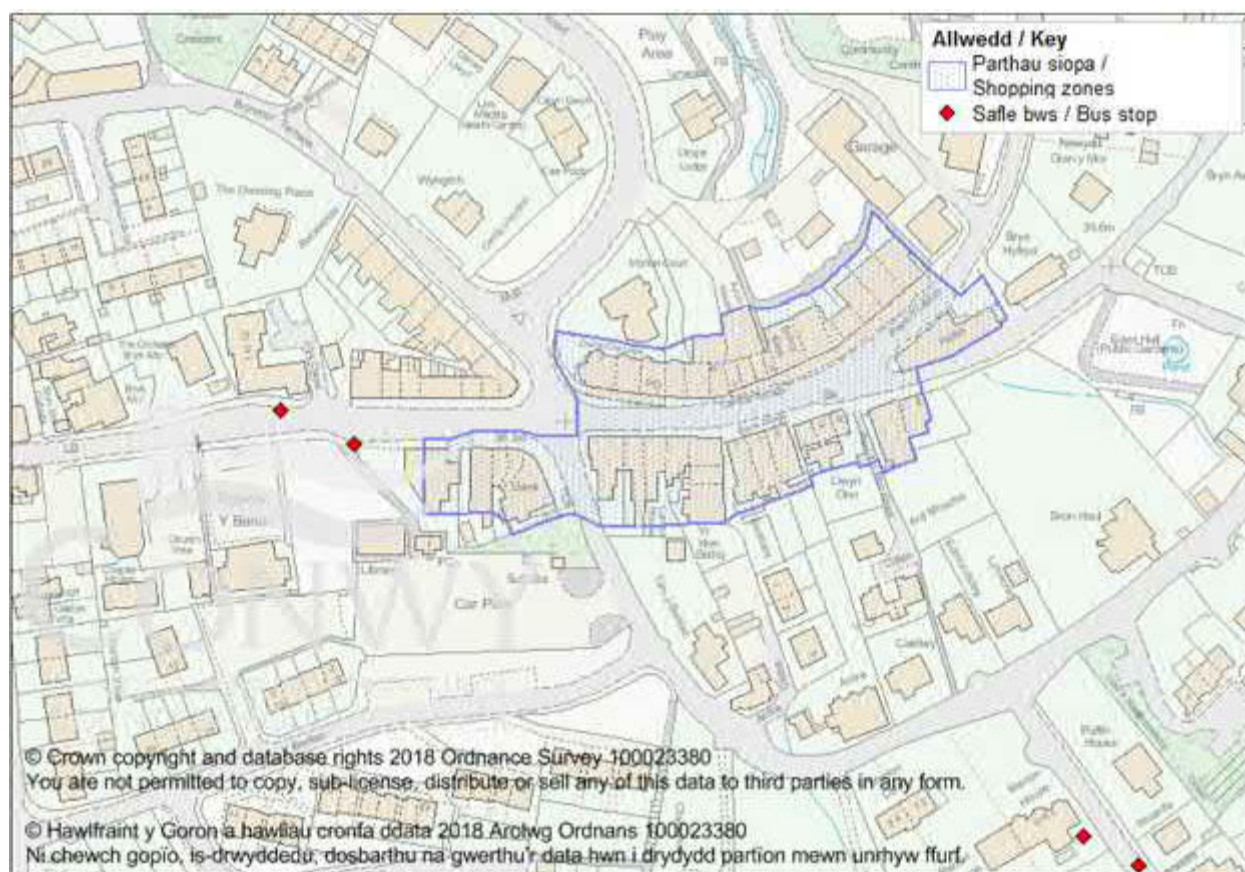
Route	Day	Inbound Journeys	Outbound Journeys	Total journeys per day
London - Birmingham - Crewe - Manchester - Chester - Holyhead*	Monday-Friday	12	12	24
	Saturday	12	10	22
	Sunday*	6	9	15

\*Penmaenmawr is a request stop

- 8.5.1 Penmaenmawr train station is approximately 280 metres from the edge of the designated LDP Shopping Zone. There is a regular service calling through Monday-Saturday, with slightly fewer trains on a Sunday, although Penmaenmawr is a request stop only.

## Map 19: Bus stops serving Penmaenmawr

Source: Environment, Roads & Facilities, Conwy County Borough Council



- 8.5.2 There are no bus stops in the designated LDP shopping Zone of Penmaenmawr, but there are stops close to it, where the road is wider. The retail centre is well served by a range of bus routes all days of the week, although there are fewer services on a Sunday.

**Table 51: Buses serving Penmaenmawr (2018)**

Source: Arriva

Main route	Service days	Inbound Journeys	Outbound Journeys	Total journeys per day
<b>Number 5</b>	Mon-Fri	32	29	61
Bangor - Llanfairfechan - Penmaenmawr - Conwy - Llandudno Junction - Llandudno	Sat	31	28	59
	Sun	14	14	28
<b>Number 75</b>	Mon-Fri	2	2	4
Llandudno - Deganwy - Llandudno Junction - Conwy - Penmaenmawr - Llanfairfechan	Sat	2	2	4
	Sun	-	-	-
<b>Number X5</b>	Mon-Fri	22	24	46
Bangor - Llanfairfechan - Penmaenmawr - Conwy - Deganwy - Llandudno	Sat	19	22	41
	Sun	11	11	22

## 8.6 Vacancy rates

**Table 52: Vacancy rates in Penmaenmawr (2017)**

Source: Experian & site visits

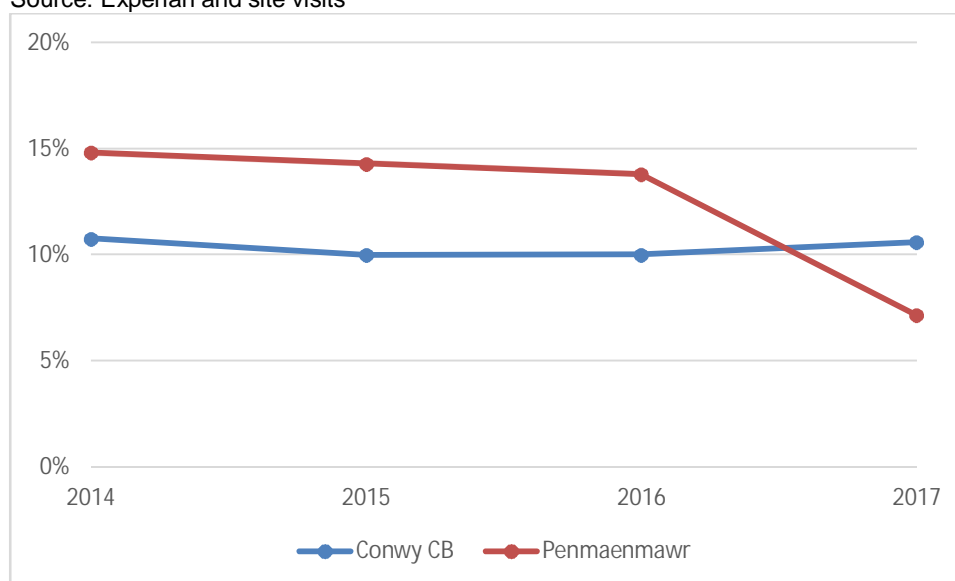
	Total number of retail units	Vacant	
		Number	%
<b>National large towns</b>	-	-	7%
<b>National small towns</b>	-	-	9%
<b>Conwy County Borough*</b>	907	96	11%
<b>Penmaenmawr Shopping Zone</b>	28	2	7%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 8.6.1 The vacancy rate in Penmaenmawr is low at only 7%, which is lower than the national small town average. Only one of these units was vacant for more than 12 months. Looking at vacancies since LDP adoption in 2013, there has been a decline in the last 12 months, which has brought the levels to below the County Borough average.

**Chart 16: Vacancies over time in Penmaenmawr**

Source: Experian and site visits



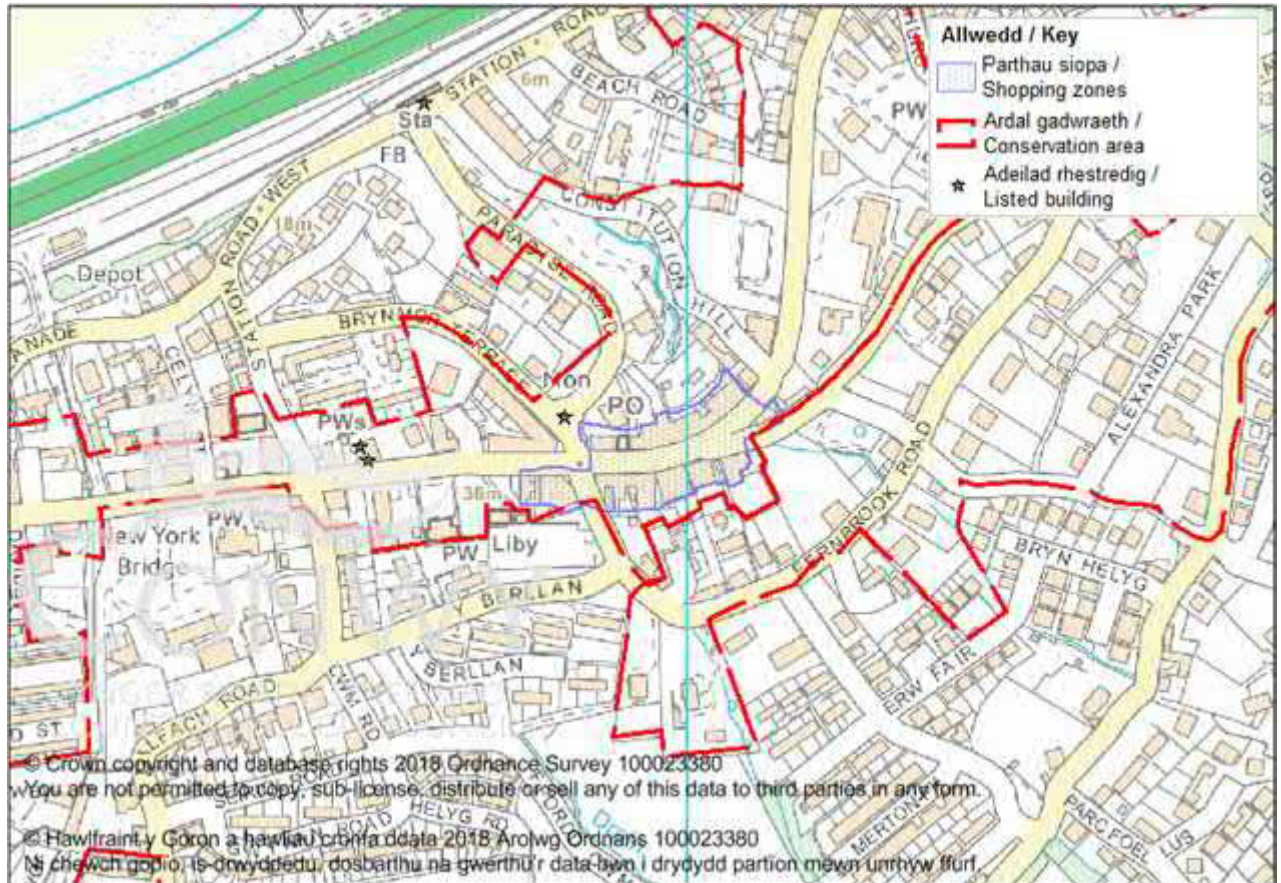
## 8.7 Natural and built environment

### Historic environment

- 8.7.1 The map below shows that there are a small number of listed buildings adjacent to the town centre. It also shows the boundary of the designated Conservation Area. The Conservation Area has distinct key characteristics. These historic designations contribute towards the unique identity of Penmaenmawr.

#### Map 20: Historic designations in Penmaenmawr 2017/18

Source: Environment, Roads and Facilities, Conwy County Borough Council

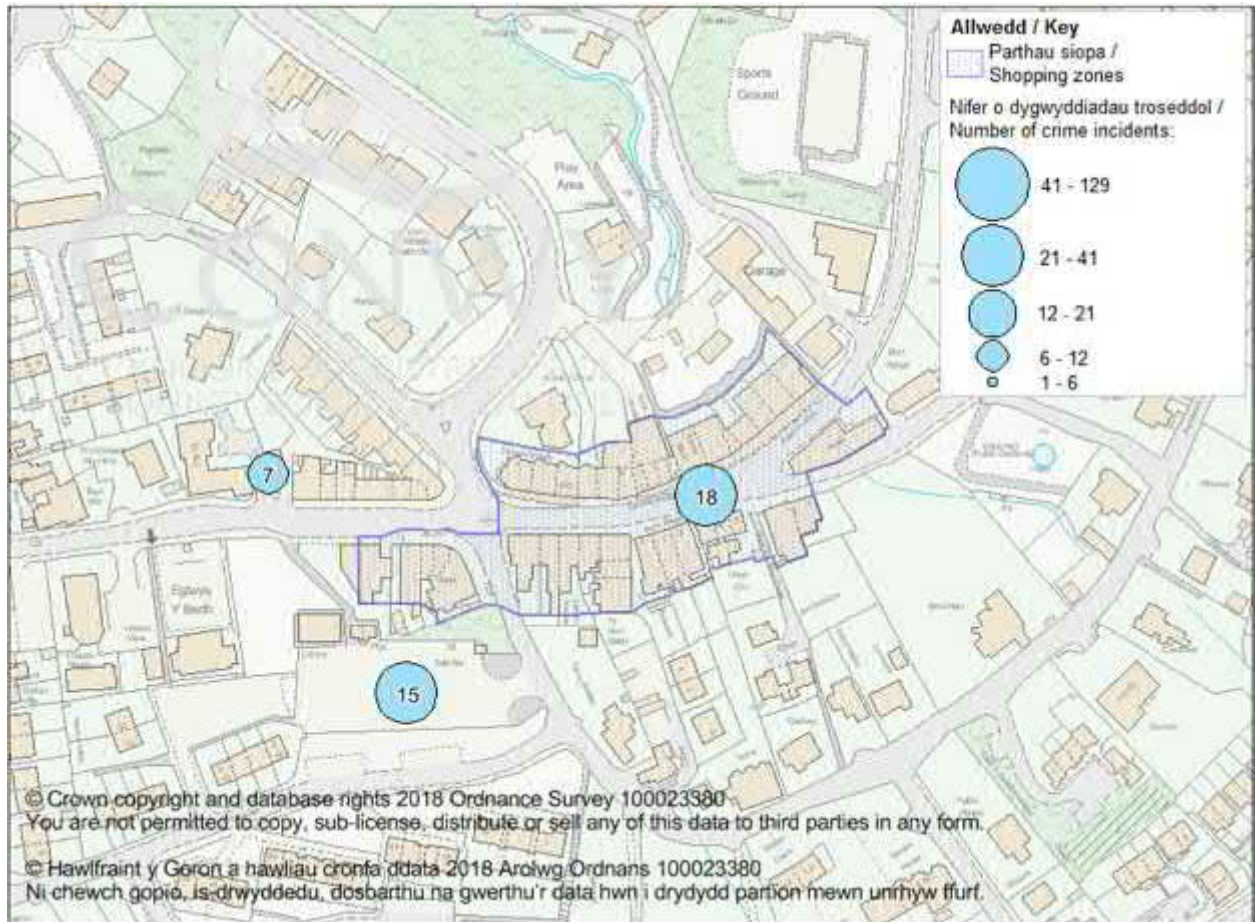


## 8.8 Crime and safety

- 8.8.1 There were 40 recorded crime incidents in the retail area of Penmaenmawr in 2017/18. The map below shows that there are certain hotspots, where there are higher incidences of crime. Further analysis over time in future will be required to monitor trends.

### Map 21: Crime incidents in Penmaenmawr 2017/18

Source: Home Office [www.Police.UK](http://www.Police.UK) website, 2018



## 9 Conwy

### 9.1 General introduction

- 9.1.1 Conwy is defined in the LDP retail hierarchy as a town centre. LDP designations include a Shopping Zone. In 2017, there were 92 retail units in the town centre designation. It is the third largest town centre in the Conwy LDP hierarchy.

#### Map 22: LDP retail designations in Conwy

Source: Conwy LDP 2007-2022



### 9.2 Use classes

- 9.2.1 The level of A1 (shops) at 62% is lower than the County Borough average, but higher than the national towns averages. A2 (financial and professional services) use is lower than the level across the County Borough and nationally. A3 (food and drink) is higher than the County Borough level and significantly higher than the national towns averages. Hot food take away is similar to the national averages, and lower than the County Borough as a whole. Providing a mix of uses in retail centres is a key objective of national policy. The data below suggests that the mix of uses in Conwy is a little unbalanced, particularly for the A3 uses. It is likely that this reflects its tourism customer base.

**Table 53: Use Classes in Conwy (2017)**

Source: Experian; CCBC site visits & Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	A1		A2		A3		A2 & A3		Hot food take away	
	No.	%	No.	%	No.	%	No.	%	No.	%
<b>National large towns average</b>		52%		13%		17%		30%		3%
<b>National small towns average</b>		52%		14%		16%		30%		4%
<b>Conwy County Borough*</b>		68%		12%		21%		32%		11%
<b>Conwy Shopping Zone</b>	57	62%	7	8%	28	30%	35	38%	4	4%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 9.2.2 Please see Appendix 2 for maps showing the distribution of use classes in the designated LDP areas.

**Table 54: Use classes over time in Conwy**

Source: Experian & CCBC site visits

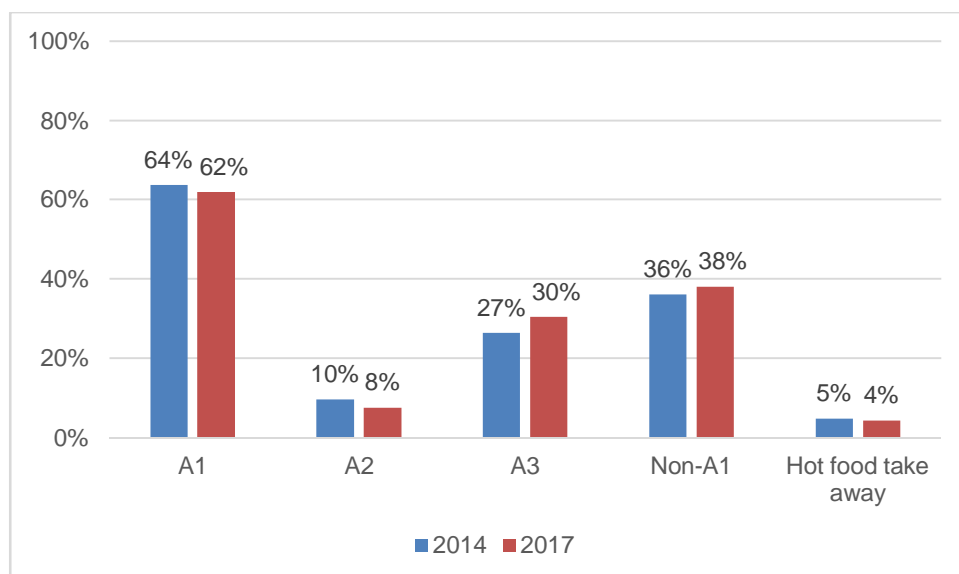
	Year	A1		A2		A3		Non-A1		Hot food take away	
		No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	523	66%	110	14%	164	21%	274	34%	44	6%
	<b>2017</b>	613	68%	107	12%	187	21%	294	32%	100	11%
<b>Conwy Shopping Zone</b>	<b>2014</b>	53	64%	8	10%	22	27%	30	36%	4	5%
	<b>2017</b>	57	62%	7	8%	28	30%	35	38%	4	4%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 9.2.3 The number of A1 (shops) in Conwy has increased slightly by four units between 2014 and 2017. A2 (financial and professional services) has decreased slightly, and the number and level of A3 (food and drink) units has increased. This reflects national retailing trends, where demand for café type uses has increased. There has been no change in the number of hot food take away units in Conwy.

### Chart 17: Use classes over time in Conwy

Source: Experian & CCBC site visits



## 9.3 Retail sub-class

### Table 55: Retail sub-class in Conwy (2017)

Source: Experian & site visits

	Conwy County Borough*	Conwy Shopping Zone	
		No	%
<b>All units**</b>	871	87	
<b>Convenience</b>	8%	10	11%
<b>Comparison</b>	40%	33	38%
<b>Service</b>	52%	44	51%
<b>Financial &amp; business services</b>	9%	4	5%
<b>Health &amp; medical services</b>	1%	0	0%
<b>Leisure services</b>	25%	30	34%
<b>Public services</b>	2%	1	1%
<b>Retail services</b>	14%	9	10%
<b>Vehicle &amp; transport services</b>	1%	0	0%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail

- 9.3.1 Conwy's level of comparison units is similar to the County Borough average. It has a higher level of convenience than the County Borough average and a similar level of service units. Leisure service is higher than for other retail centres in the LDP, and financial and business services and retail services are both lower. This reflects the

findings in the use classes above, which suggests that the uses found in the retail centre are a little unbalanced.

**Table 56: Retail sub-class over time in Conwy**

Source: Experian & site visits

	Year	Total units**	Convenience No.	%	Comparison No.	%	Service No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	879		9%		40%		51%
	<b>2017</b>	871		8%		40%		52%
<b>Conwy Shopping Zone</b>	<b>2014</b>	91	11	12%	38	42%	42	46%
	<b>2017</b>	87	10	11%	33	38%	44	51%

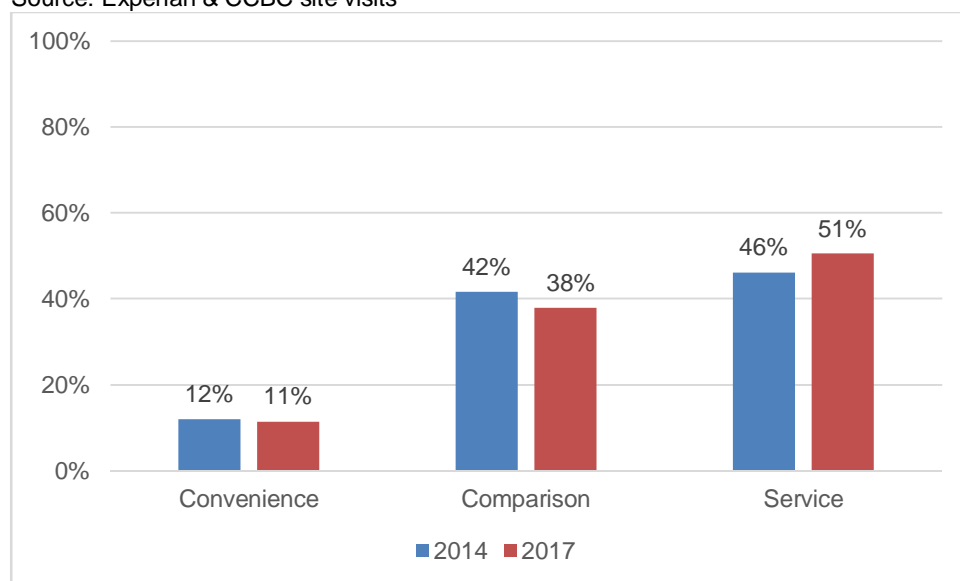
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail. Does not include vacancies.

- 9.3.2 The levels of retail sub-class has remained mostly the same since 2014 in Conwy. Convenience has decreased by one unit. Comparison has also decreased, but by five units. Service has increased by two units.

**Chart 18: Retail sub-class over time in Conwy**

Source: Experian & CCBC site visits



## 9.4 Key attractors and multiple traders

**Table 57: Key attractors and multiple traders in Conwy (2017)**

Source: Experian, Heart of our town report Colwyn Bay 2017 (People & Places Partnership) & CCBC site visits

	Conwy County Borough*	National average		Conwy Shopping Zone	
		Large towns	Small Towns	No	%
<b>All A1 retail units**</b>	542			56	
<b>Key attractor</b>	4%	10%	7%	0	0%
<b>Multiple trader</b>	16%	25%	19%	5	9%
<b>Regional trader</b>	2%	10%	10%	3	5%
<b>Independent trader</b>	72%	56%	64%	45	80%
<b>Charity shops</b>	6%	-	-	3	5%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

- 9.4.1 Independent trader retail units form the majority of retail in Conwy, and is higher than the levels seen in the national averages. This contributes towards Conwy having a unique sense of character. There are five national multiple trader brands in Conwy, which is lower than the national averages, but does reflect the size of the retail centre.

**Table 58: Key attractors and multiple traders over time in Conwy**

Source: Experian & CCBC site visits

	Year	Total A1**	Key attractor		Multiple trader		Regional trader		Independent trader		Charity	
			No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	538	21	4%	111	21%	5	1%	361	67%	40	7%
	<b>2017</b>	542	19	4%	88	16%	9	2%	391	72%	35	6%
<b>Conwy Shopping Zone</b>	<b>2014</b>	54	0	0%	6	11%	0	0%	45	83%	3	6%
	<b>2017</b>	56	0	0%	5	9%	3	5%	45	80%	3	5%

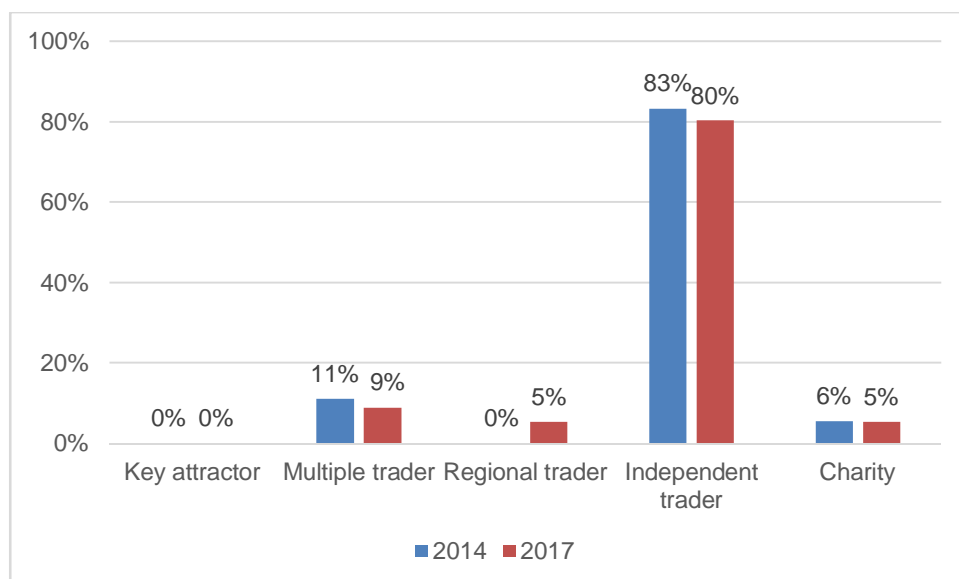
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

- 9.4.2 There has been some change in the balance between the larger national retail brands and local independent traders in Conwy since the LDP was adopted. The number of multiple traders has decreased, from six to five units. There are now three new regional traders operating in the retail centre. The number of independent traders has remained the same, but there has been a small decrease in the level of their representation.

### Chart 19: Key attractors and multiple traders over time in Conwy

Source: Experian & CCBC site visits



## 9.5 Accessibility

### Public transport

#### Table 59: Trains serving Conwy (2018)

Source: Arriva Trains Wales

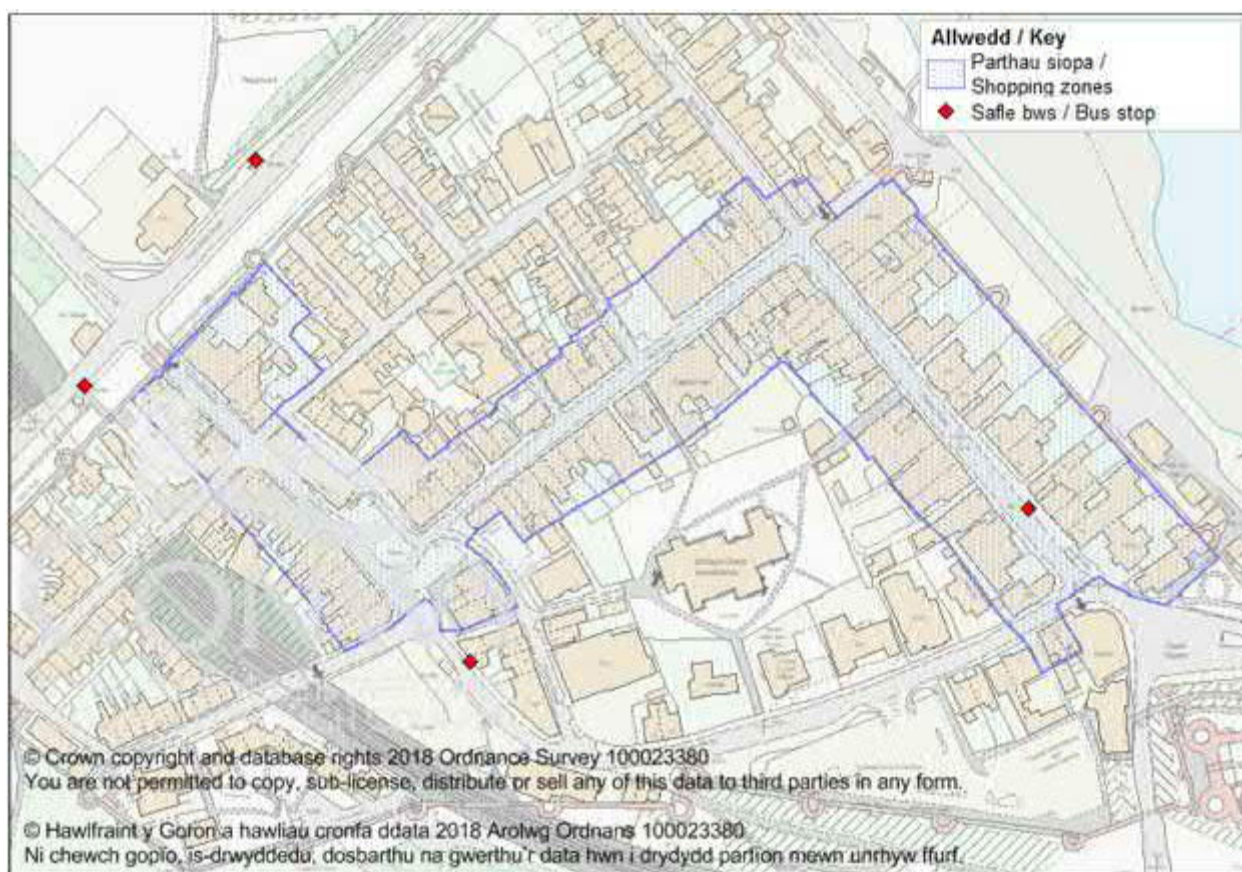
Route	Day	Inbound Journeys	Outbound Journeys	Total journeys per day
London - Birmingham - Crewe - Manchester - Chester - Holyhead*	Monday-Friday	12	11	23
	Saturday	12	10	22
	Sunday*	6	9	15

\*Conwy is a request stop

- 9.5.1 Conwy train station is on the edge of the designated LDP Shopping Zone. There is a frequent service Monday-Saturday, and a more limited service on Sunday, although the station is a request stop only.

### Map 23: Bus stops serving Conwy

Source: Environment, Roads & Facilities, Conwy County Borough Council



- 9.5.2 There is one bus stops in the designated LDP Shopping Zone of Conwy, with others nearby. The retail centre is well served by a range of bus routes all days of the week, although there are fewer services on a Sunday.

**Table 60: Buses serving Conwy (2018)**

Source: Arriva

Main route	Service days	Inbound Journeys	Outbound Journeys	Total journeys per day
<b>Number 5</b>	Mon-Fri	31	29	60
Bangor - Llanfairfechan - Penmaenmawr - Conwy - Llandudno Junction - Llandudno	Sat	31	28	59
	Sun	14	14	28
<b>Number 14/15</b>	Mon-Fri	23	24	47
Conwy - Deganwy - Llandudno - Rhos-on-Sea - Colwyn Bay - Llysfaen	Sat	23	23	46
	Sun	-	-	-
<b>Number 19</b>	Mon-Fri	13	12	25
Cwm Penmachno - Betws-y-Coed - Llanrwst - Conwy - Llandudno Junction - Llandudno	Sat	13	12	25
	Sun	6	6	12
<b>Number 27</b>	Mon-Fri	13	12	25
Conwy - Llandudno Junction - Mochdre - Colwyn Bay - Old Colwyn	Sat	12	12	24
	Sun	-	-	-
<b>Number 75</b>	Mon-Fri	2	2	4
Llandudno - Deganwy - Llandudno Junction - Conwy - Penmaenmawr - Llanfairfechan	Sat	2	2	4
	Sun	-	-	-
<b>Number X5</b>	Mon-Fri	22	24	46
Bangor - Llanfairfechan - Penmaenmawr - Conwy - Deganwy - Llandudno	Sat	19	22	41
	Sun	11	11	22

## 9.6 Vacancy rates

**Table 61: Vacancy rates in Conwy (2017)**

Source: Experian &amp; site visits

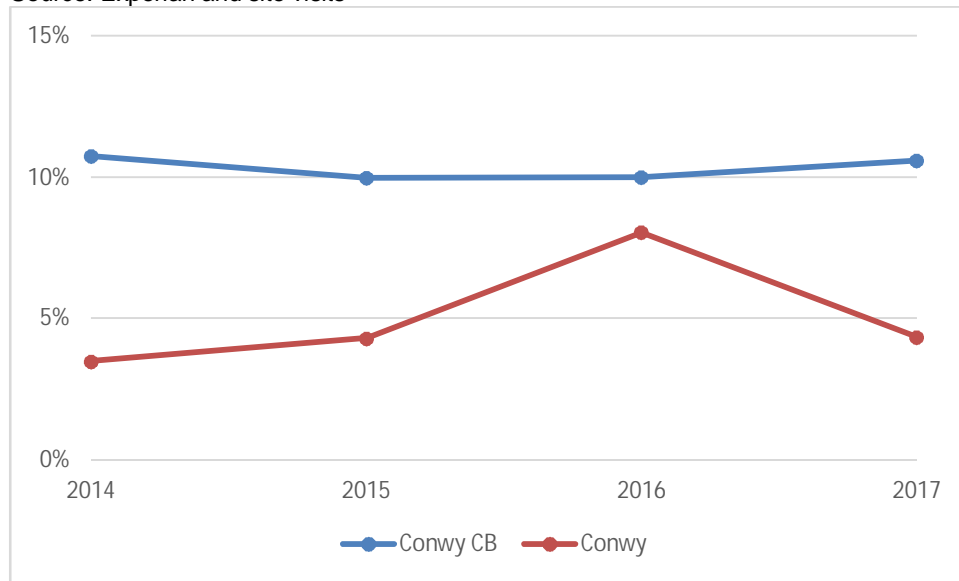
	Total number of retail units	Vacant	
		Number	%
<b>National large towns</b>	-	-	7%
<b>National small towns</b>	-	-	9%
<b>Conwy County Borough*</b>	907	96	11%
<b>Conwy Shopping Zone</b>	92	4	4%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

- 9.6.1 The vacancy rate in Conwy is very low at only 4%. The majority of these have been vacant for more than 12 months, suggesting that they may be undesirable units. This needs further monitoring. Looking at vacancies since LDP adoption in 2013, they were increasing, but have been decreasing over the last 12 months.

**Chart 20: Vacancies over time in Conwy**

Source: Experian and site visits



## 9.7 Natural and built environment

### Historic environment

- 9.7.1 The map below shows that there are many listed buildings in the town centre. They represent a key part of the County Borough's built heritage. It also shows the boundary of the designated Conservation Area and internationally important UNESCO World Heritage Site of Conwy Castle. The Conservation Area has a distinct key characteristics. These historic designations contribute towards the unique identity of Conwy.

#### Map 24: Historic designations in Conwy 2017/18

Source: Environment, Roads and Facilities, Conwy County Borough Council

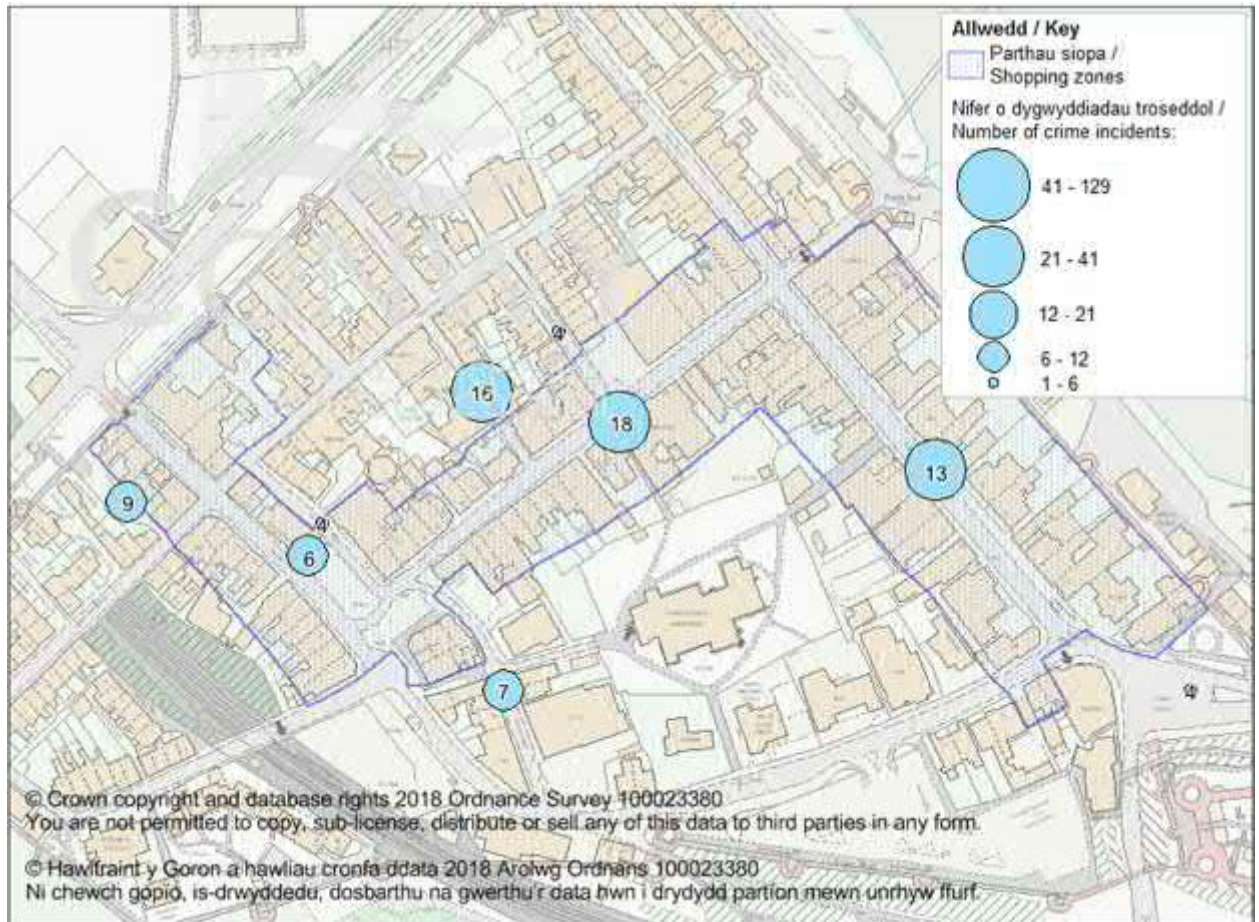


## 9.8 Crime and safety

- 9.8.1 There were 81 recorded crime incidents in the retail area of Conwy in 2017/18. The map below shows that there are no significant hotspots, where there are higher incidences of crime. Further analysis over time in future will be required to monitor trends.

### Map 25: Crime incidents in Conwy 2017/18

Source: Home Office [www.Police.UK](http://www.Police.UK) website, 2018



## 10 Llandudno Junction

### 10.1 General introduction

- 10.1.1 Llandudno Junction is defined in the LDP retail hierarchy as a town centre. LDP designations include a Shopping Zone. In 2017, there were 29 retail units in the town centre designation. Llandudno Junction also has a large Tesco supermarket and leisure area, which includes fast food restaurants and a cinema.

#### Map 26: LDP retail designations in Llandudno Junction

Source: Conwy LDP 2007-2022



### 10.2 Use classes

- 10.2.1 The level of A1 (shops) in Llandudno Junction at 55% is lower than the County Borough level, but similar to the national towns averages. Both A2 (financial and professional services) and A3 (food and drink) are higher, which shows that the retail centre does have a range of uses, as sought by national planning policy. Hot food take away is significantly higher than the national averages and across the County Borough.

**Table 62: Use Classes in Llandudno Junction (2017)**

Source: Experian; CCBC site visits & Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	A1		A2		A3		A2 & A3		Hot food take away	
	No.	%	No.	%	No.	%	No.	%	No.	%
<b>National large towns average</b>		52%		13%		17%		30%		3%
<b>National small towns average</b>		52%		14%		16%		30%		4%
<b>Conwy County Borough*</b>		68%		12%		21%		32%		11%
<b>Llandudno Junction Shopping Zone</b>	16	55%	5	17%	8	28%	13	45%	5	17%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

10.2.2 Please see Appendix 2 for maps showing the distribution of use classes in the designated LDP areas.

**Table 63: Use classes over time in Llandudno Junction**

Source: Experian & CCBC site visits

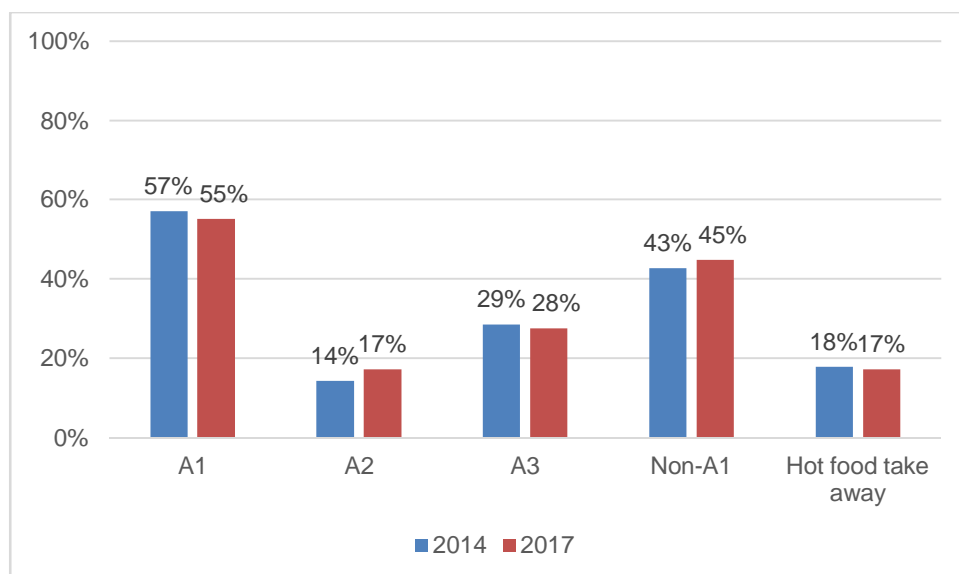
	Year	A1		A2		A3		Non-A1		Hot food take away	
		No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	523	66%	110	14%	164	21%	274	34%	44	6%
	<b>2017</b>	613	68%	107	12%	187	21%	294	32%	100	11%
<b>Llandudno Junction Shopping Zone</b>	<b>2014</b>	16	57%	4	14%	8	29%	12	43%	5	18%
	<b>2017</b>	16	55%	5	17%	8	28%	13	45%	5	17%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

10.2.3 There has been very little change in the mix of uses in the retail centre of Llandudno Junction between 2014 and 2017. There has been an increase of one A2 unit. All other uses have remained the same.

### Chart 21: Use classes over time in Llandudno Junction

Source: Experian & CCBC site visits



## 10.3 Retail sub-class

**Table 64: Retail sub-class in Llandudno Junction (2017)**

Source: Experian & site visits

	Conwy County Borough*	Llandudno Junction Shopping Zone	
		No	%
<b>All units**</b>	871	28	
<b>Convenience</b>	8%	1	4%
<b>Comparison</b>	40%	6	21%
<b>Service</b>	52%	21	75%
<b>Financial &amp; business services</b>	9%	2	7%
<b>Health &amp; medical services</b>	1%	2	7%
<b>Leisure services</b>	25%	10	36%
<b>Public services</b>	2%	0	0%
<b>Retail services</b>	14%	7	25%
<b>Vehicle &amp; transport services</b>	1%	0	0%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail

10.3.1 Llandudno Junction has a relatively low level of comparison units when compared with the County Borough average, which is to be expected given the retail centres close proximity to Llandudno. The level of convenience is also low, but again, to be expected, as there are supermarkets in Llandudno Junction, but outside of the designated

Shopping Zone. Leisure and retail services are much higher than elsewhere in the County Borough. This suggests that town centre uses are a little unbalanced, but not of concern given the location of other retailing facilities.

**Table 65: Retail sub-class over time in Llandudno Junction**

Source: Experian & site visits

	Year	Total units**	Convenience No.	%	Comparison No.	%	Service No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	879		9%		40%		51%
	<b>2017</b>	871		8%		40%		52%
<b>Llandudno Junction Shopping Zone</b>	<b>2014</b>	35	1	3%	6	17%	28	80%
	<b>2017</b>	28	1	4%	6	21%	21	75%

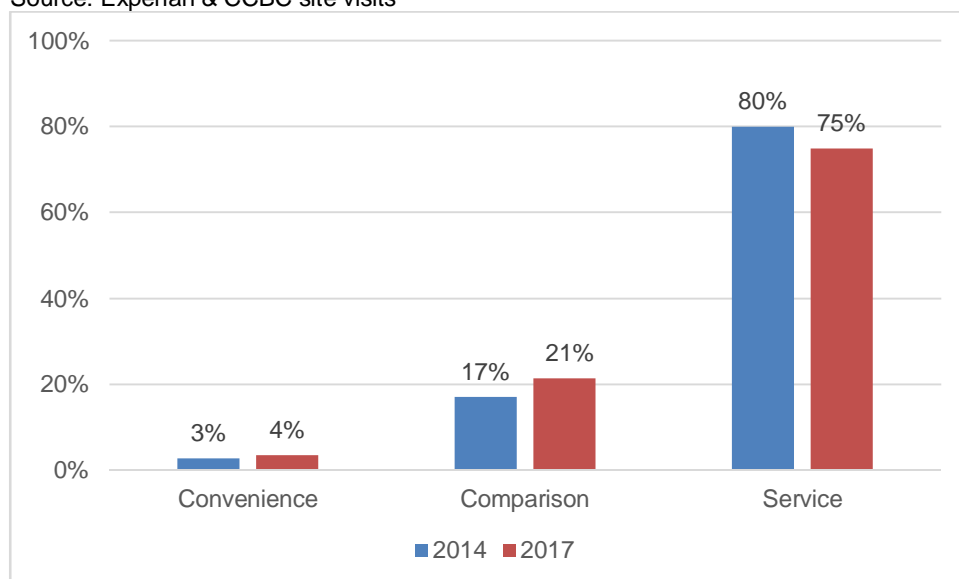
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail. Does not include vacancies.

- 10.3.2 The levels of retail sub-class has changed since 2014 in Llandudno Junction. Convenience has remained the same with one unit. Comparison has seen no change in the number of units, but the percentage level has increased due to other changes. Service has seen a significant decrease of seven units.

**Chart 22: Retail sub-class over time in Llandudno Junction**

Source: Experian & CCBC site visits



## 10.4 Key attractors and multiple traders

**Table 66: Key attractors and multiple traders in Llandudno Junction (2017)**

Source: Experian, Heart of our town report Colwyn Bay 2017 (People & Places Partnership) & CCBC site visits

	Conwy County Borough*	National average		Llandudno Junction Shopping Zone	
		Large towns	Small Towns	No	%
<b>All A1 retail units**</b>	542			18	
<b>Key attractor</b>	4%	10%	7%	0	0%
<b>Multiple trader</b>	16%	25%	19%	2	14%
<b>Regional trader</b>	2%	10%	10%	1	7%
<b>Independent trader</b>	72%	56%	64%	10	71%
<b>Charity shops</b>	6%	-	-	1	7%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

10.4.1 Independent trader retail units form the majority of retail in Llandudno Junction, and is higher than the levels seen in the national averages, but comparable with the County Borough average. This contributes towards Llandudno Junction having a unique sense of character. There are two national multiple trader brands in Llandudno Junction, which is lower than the national averages, but does reflect the size of the retail centre.

**Table 67: Key attractors and multiple traders over time in Llandudno Junction**

Source: Experian & CCBC site visits

	Year	Total A1**	Key attractor		Multiple trader		Regional trader		Independent trader		Charity	
			No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	538	21	4%	111	21%	5	1%	361	67%	40	7%
	<b>2017</b>	542	19	4%	88	16%	9	2%	391	72%	35	6%
<b>Llandudno Junction Shopping Zone</b>	<b>2014</b>	17	0	0%	6	35%	0	0%	10	59%	1	6%
	<b>2017</b>	14	0	0%	2	14%	1	7%	10	71%	1	7%

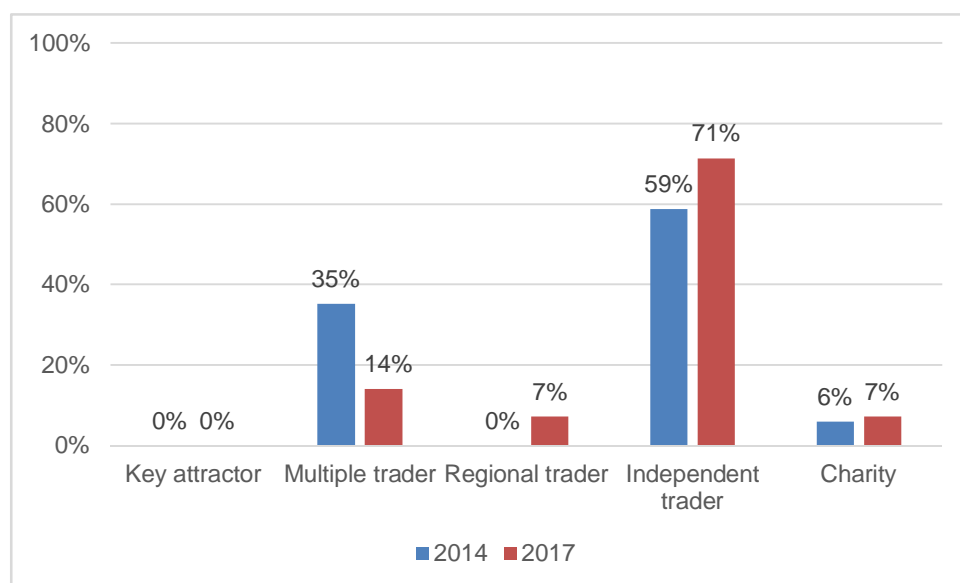
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

10.4.2 There has been some change in the balance between the larger national retail brands and local independent traders in Llandudno Junction since the LDP was adopted. The number of multiple traders has decreased, from six to two units, which is a significant drop for a retail centre of this size. The number of independent traders has stayed the same.

### Chart 23: Key attractors and multiple traders over time in Llandudno Junction

Source: Experian & CCBC site visits



## 10.5 Accessibility

### Public transport

#### Table 68: Trains serving Llandudno Junction (2018)

Source: Arriva Trains Wales

Route	Day	Inbound Journeys	Outbound Journeys	Total journeys per day
London - Birmingham - Crewe - Manchester - Chester - Holyhead	Monday-Friday	53	38	91
	Saturday	54	34	88
	Sunday*	31	20	51
Birmingham - Shrewsbury - Chester - Holyhead	Monday-Friday	15	14	29
	Saturday	14	14	28
	Sunday	3	3	6
Llandudno – Blaenau Ffestiniog	Monday-Friday	6	6	12
	Saturday	6	6	12
	Sunday	-	-	-
London - West Midlands - Holyhead - Manchester - Inverness	Monday-Friday	7	10	17
	Saturday	4	6	10
	Sunday	5	4	9
Manchester - Holyhead - Crewe - Cardiff	Monday-Friday	12	8	20
	Saturday	14	6	20
	Sunday	3	2	5

10.5.1 Llandudno Junction train station is approximately 200 metres from the edge of the designated LDP Shopping Zone. It is well served by a range of train routes, which link it to local stations.

#### **Map 27: Bus stops serving Llandudno Junction**

Source: Environment, Roads & Facilities, Conwy County Borough Council



10.5.2 There are two bus stops in the LDP Shopping Zone of Llandudno Junction, with others nearby. The retail centre is well served by a range of bus routes all days of the week, although there are fewer services on a Sunday.

**Table 69: Buses serving Llandudno Junction (2018)**

Source: Arriva

Main route	Service days	Inbound Journeys	Outbound Journeys	Total journeys per day
<b>Number 5</b> Bangor - Llanfairfechan - Penmaenmawr - Conwy - Llandudno Junction - Llandudno	Mon-Fri Sat Sun	31 31 14	29 28 14	60 59 28
<b>Number 13</b> Llandudno - Mochdre - Colwyn Bay - Abergele - Prestatyn	Mon-Fri Sat Sun	25 25 12	24 24 12	49 49 24
<b>Number 19</b> Cwm Penmachno - Betws-y-Coed - Llanrwst - Conwy - Llandudno Junction - Llandudno	Mon-Fri Sat Sun	13 13 6	12 12 6	25 25 12
<b>Number 24</b> Colwyn Bay - Rhos-on-Sea - Mochdre - Llandudno Junction	Mon-Fri Sat Sun	3 1 -	3 1 -	6 2 -
<b>Number 25</b> Eglwysbach - Glan Conwy - Llandudno Junction - Llandudno	Mon-Fri Sat Sun	7 7 -	7 7 -	14 14 -
<b>Number 27</b> Conwy - Llandudno Junction - Mochdre - Colwyn Bay - Old Colwyn	Mon-Fri Sat Sun	12 11 -	13 13 -	25 24 -
<b>Number 75</b> Llandudno - Deganwy - Llandudno Junction - Conwy - Penmaenmawr - Llanfairfechan	Mon-Fri Sat Sun	2 2 -	2 2 -	4 4 -
<b>Number X5</b> Bangor - Llanfairfechan - Penmaenmawr - Conwy - Deganwy - Llandudno	Mon-Fri Sat Sun	22 19 11	23 22 11	45 41 22
<b>Number X19</b> Blaenau Ffestiniog - Dolwyddelan - Betws-y-Coed - Llanrwst - Conwy - Llandudno Junction - Deganwy - Llandudno	Mon-Fri Sat Sun	8 8 4	9 8 4	17 16 8

## 10.6 Vacancy rates

**Table 70: Vacancy rates in Llandudno Junction (2017)**

Source: Experian & site visits

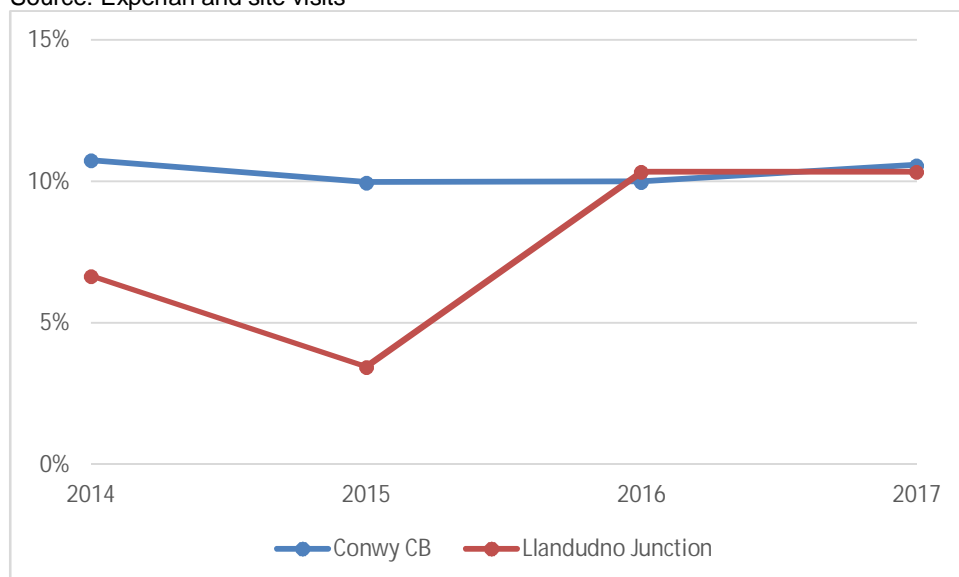
	Total number of retail units	Vacant	
		Number	%
<b>National large towns</b>	-	-	7%
<b>National small towns</b>	-	-	9%
<b>Conwy County Borough*</b>	907	96	11%
<b>Llandudno Junction Shopping Zone</b>	29	3	10%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

10.6.3 The vacancy rate in Llandudno Junction is comparable with the County Borough and national small towns averages at 10%. Two of these units were vacant for more than 12 months. This will need monitoring in future, as long-term vacancies are a concern. Looking at vacancies since LDP adoption in 2013, there has been an overall increase since 2014, however, the number of units in this centre is small and so a change in just one unit can look significant over time.

**Chart 24: Vacancies over time in Llandudno Junction**

Source: Experian and site visits

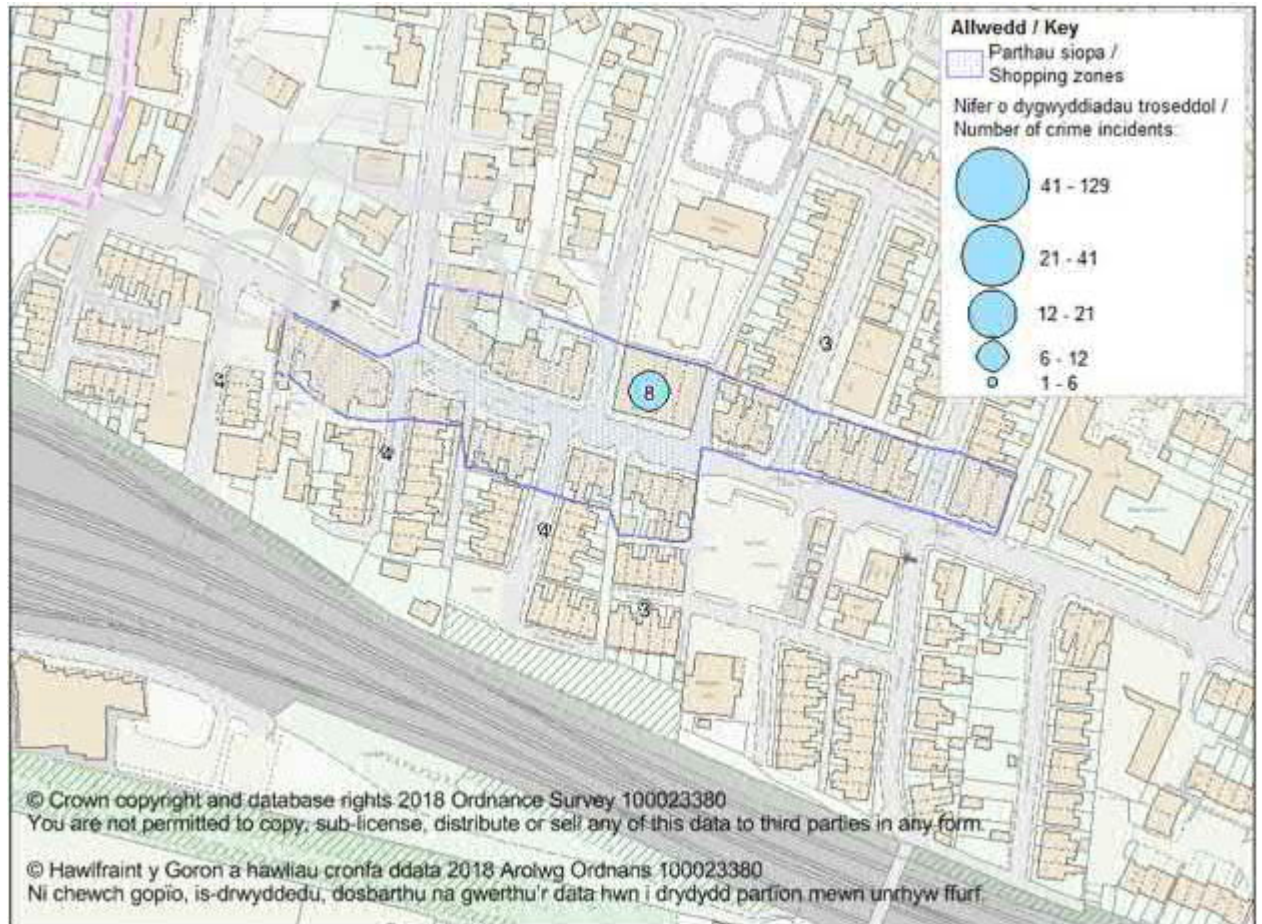


## 10.7 Crime and safety

10.7.1 There were 26 recorded crime incidents in the retail area of Llandudno Junction in 2017/18. The map below shows that there are no significant hotspots, where there are higher incidences of crime and that crime is low in this area. Further analysis over time in future will be required to monitor trends.

### Map 28: Crime incidents in Llandudno Junction 2017/18

Source: Home Office [www.Police.UK](http://www.Police.UK) website



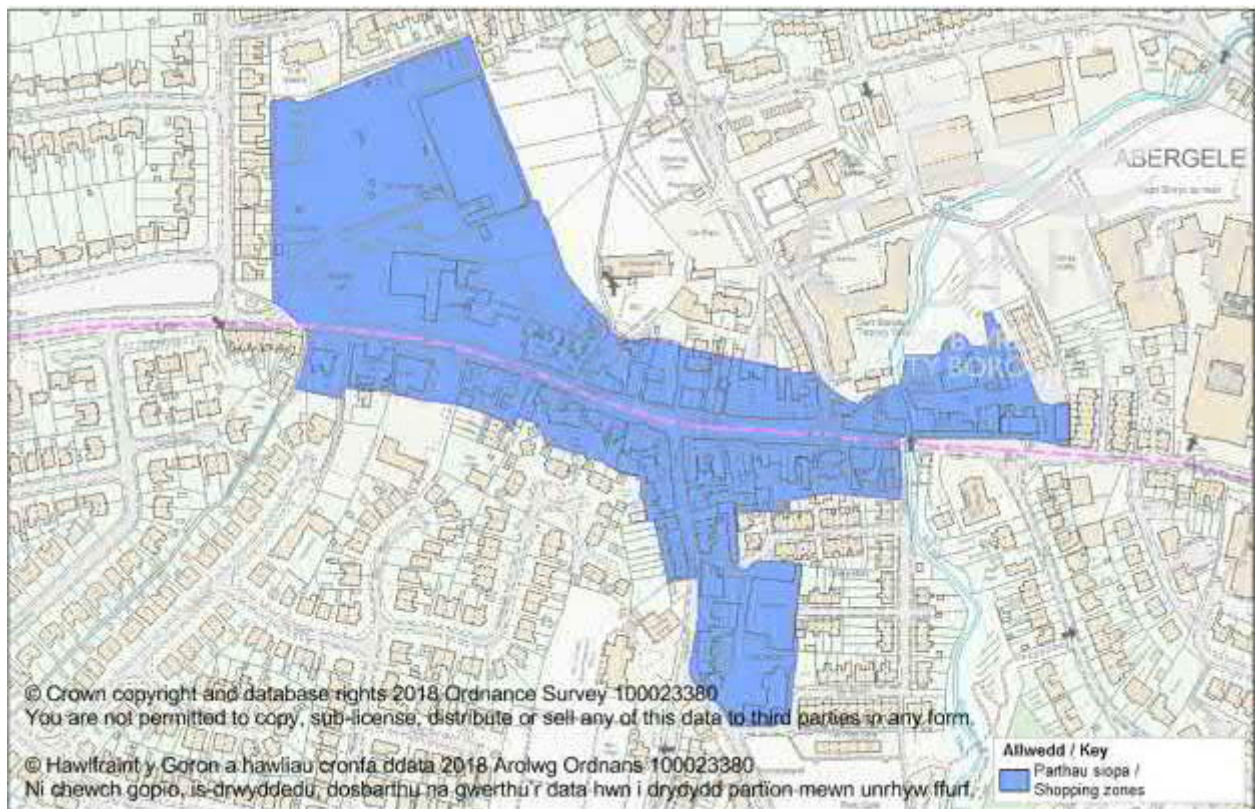
## 11 Abergele

### 11.1 General introduction

11.1.1 Abergele is defined in the LDP retail hierarchy as a town centre. LDP designations include a Shopping Zone. In 2017, there were 91 retail units in the town centre designation.

#### Map 29: LDP retail designations in Abergele

Source: Conwy LDP 2007-2022



### 11.2 Use classes

11.2.1 The level of A1 (shops) in Abergele at 58% is lower than the County Borough level, but higher than the national towns averages. A2 (financial and professional services) is higher and A3 (food and drink) use is similar, which shows that the retail centre does have a range of uses, as sought by national planning policy. Hot food take away is slightly higher than the national averages, but lower than across the County Borough.

**Table 71: Use classes in Abergele (2017)**

Source: Experian; CCBC site visits & Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	A1		A2		A3		A2 & A3		Hot food take away	
	No.	%	No.	%	No.	%	No.	%	No.	%
<b>National large towns average</b>		52%		13%		17%		30%		3%
<b>National small towns average</b>		52%		14%		16%		30%		4%
<b>Conwy County Borough*</b>		68%		12%		21%		32%		11%
<b>Abergele Shopping Zone</b>	53	58%	21	23%	17	19%	38	42%	5	5%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

11.2.2 Please see Appendix 2 for maps showing the distribution of use classes in the designated LDP areas.

**Table 72: Use classes over time in Abergele**

Source: Experian & CCBC site visits

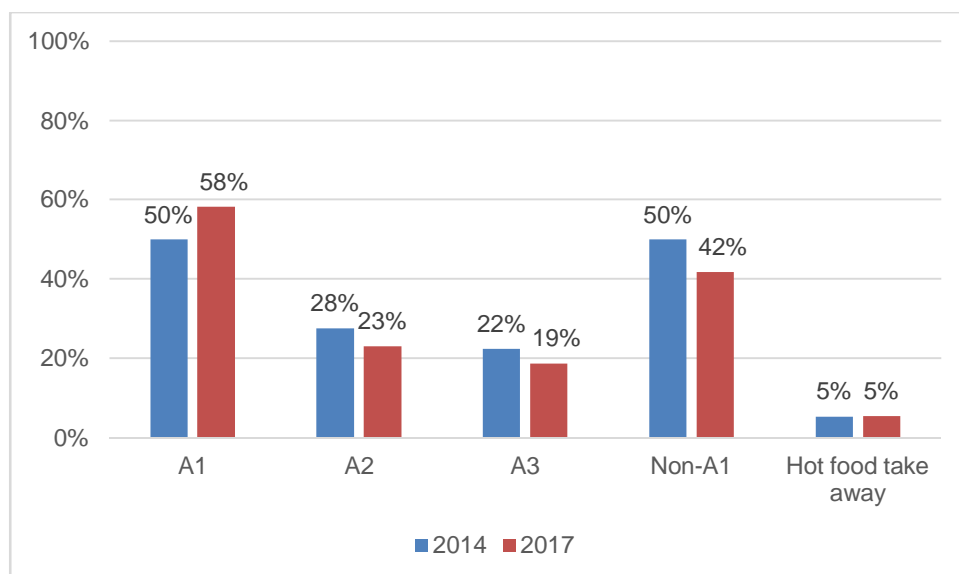
	Year	A1		A2		A3		Non-A1		Hot food take away	
		No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	523	66%	110	14%	164	21%	274	34%	44	6%
	<b>2017</b>	613	68%	107	12%	187	21%	294	32%	100	11%
<b>Abergele Shopping Zone</b>	<b>2014</b>	38	50%	21	28%	17	22%	38	50%	4	5%
	<b>2017</b>	53	58%	21	23%	17	19%	38	42%	5	5%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

11.2.3 The number of A1 (shops) units has increased by 15 in Abergele between 2014 and 2017. This is a significant increase for a retail centre of this size. The number of A2 (financial and professional services) and A3 (food and drink) units has remained the same. The number of hot food take away units in Abergele has increased by one.

### Chart 25: Use classes over time in Abergele

Source: Experian & CCBC site visits



## 11.3 Retail sub-class

### Table 73: Retail sub-class in Abergele (2017)

Source: Experian & site visits

	Conwy County Borough*	Abergele Shopping Zone	
		No	%
<b>All units**</b>	871	95	
<b>Convenience</b>	8%	8	8%
<b>Comparison</b>	40%	29	31%
<b>Service</b>	52%	58	61%
<b>Financial &amp; business services</b>	9%	13	14%
<b>Health &amp; medical services</b>	1%	2	2%
<b>Leisure services</b>	25%	22	23%
<b>Public services</b>	2%	1	1%
<b>Retail services</b>	14%	16	17%
<b>Vehicle &amp; transport services</b>	1%	4	4%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail

11.3.1 Abergele has a relatively low level of comparison units when compared with the County Borough average. This is to be expected, as residents are likely to travel to larger centres for comparison goods. Convenience retailing is the same as the average for the LDP area as a whole. The level of service units is higher, across a variety of types. This

suggests that Abergele has a good range of retail sub-class, which is encouraged by national retail policy.

**Table 74: Retail sub-class over time in Abergele**

Source: Experian & site visits

	Year	Total units**	Convenience No.	%	Comparison No.	%	Service No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	879		9%		40%		51%
	<b>2017</b>	871		8%		40%		52%
<b>Abergele Shopping Zone</b>	<b>2014</b>	96	9	9%	24	25%	63	66%
	<b>2017</b>	95	8	8%	29	31%	58	61%

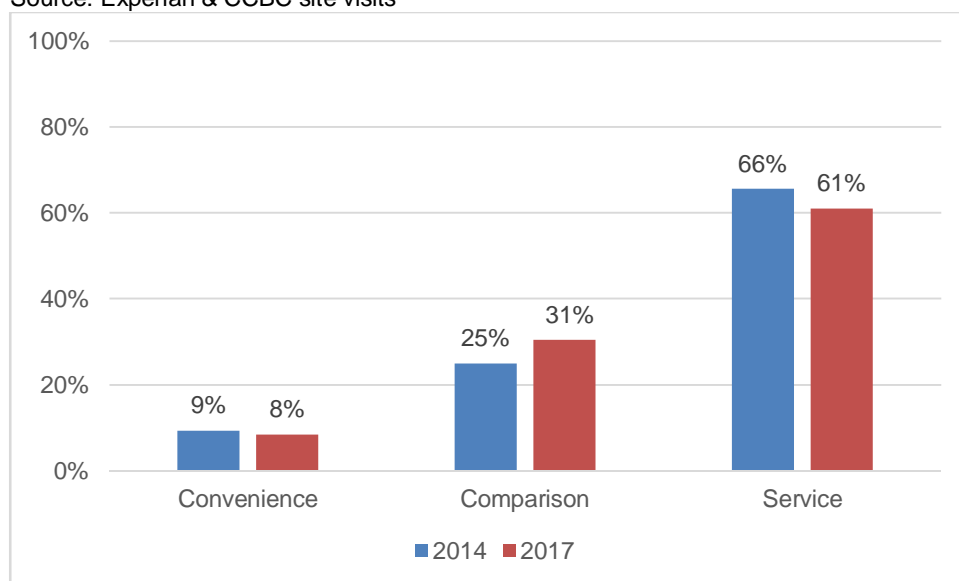
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail. Does not include vacancies.

11.3.2 The levels of retail sub-class has changed since 2014 in Abergele. Convenience has decreased by one unit. Comparison has seen a significant increase of five units, whereas service has seen a significant decrease.

**Chart 26: Retail sub-class over time in Abergele**

Source: Experian & CCBC site visits



## 11.4 Key attractors and multiple traders

**Table 75: Key attractors and multiple traders in Abergele (2017)**

Source: Experian, Heart of our town report Colwyn Bay 2017 (People & Places Partnership) & CCBC site visits

	Conwy County Borough*	National average		Abergele Shopping Zone	
		Large towns	Small Towns	No	%
<b>All A1 retail units**</b>	542			50	
<b>Key attractor</b>	4%	10%	7%	1	2%
<b>Multiple trader</b>	16%	25%	19%	5	10%
<b>Regional trader</b>	2%	10%	10%	0	0%
<b>Independent trader</b>	72%	56%	64%	39	78%
<b>Charity shops</b>	6%	-	-	5	10%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

11.4.1 Independent trader retail units form the majority of retail in Abergele, and is higher than the levels seen in the national averages. This contributes towards Abergele having a unique sense of character. There is one key attractor national retail brand and five national multiple trader brands. This is lower than the national averages, but higher than similar sized towns in the County Borough which reflects the size of the retail centre.

**Table 76: Key attractors and multiple traders over time in Abergele**

Source: Experian & CCBC site visits

	Year	Total A1**	Key attractor		Multiple trader		Regional trader		Independent trader		Charity	
			No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	538	21	4%	111	21%	5	1%	361	67%	40	7%
	<b>2017</b>	542	19	4%	88	16%	9	2%	391	72%	35	6%
<b>Abergele Shopping Zone</b>	<b>2014</b>	46	2	4%	7	15%	0	0%	32	70%	5	11%
	<b>2017</b>	50	1	2%	5	10%	0	0%	39	78%	5	10%

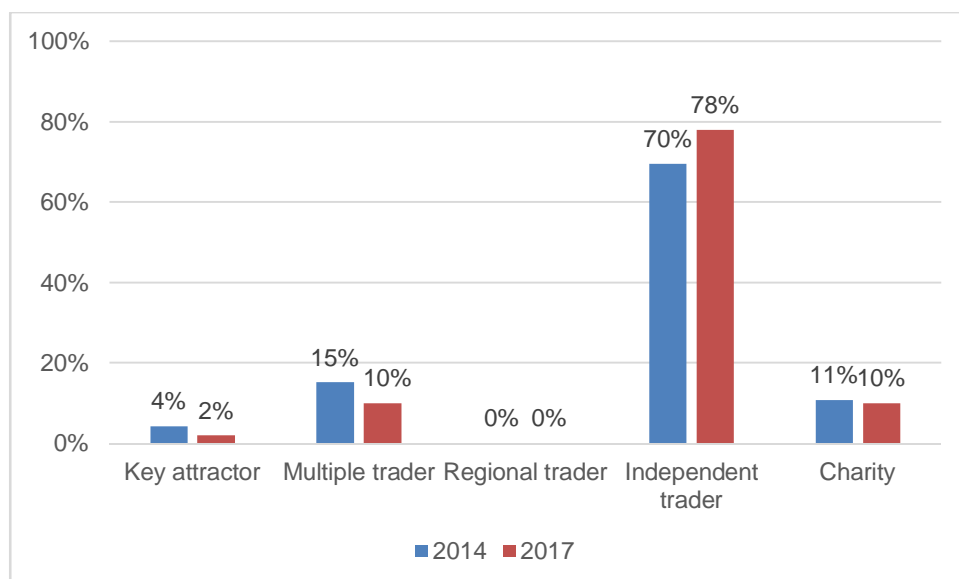
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

11.4.2 There has been some change in the balance between the larger national retail brands and local independent traders in Abergele since the LDP was adopted. The number of key attractors has fallen from two to one unit. The number of multiple traders has also decreased, from seven to five units. The number of independent traders has increased by seven units.

### Chart 27: Key attractors and multiple traders over time in Abergele

Source: Experian & CCBC site visits



## 11.5 Accessibility

### Public transport

#### Table 77: Trains serving Abergele (2018)

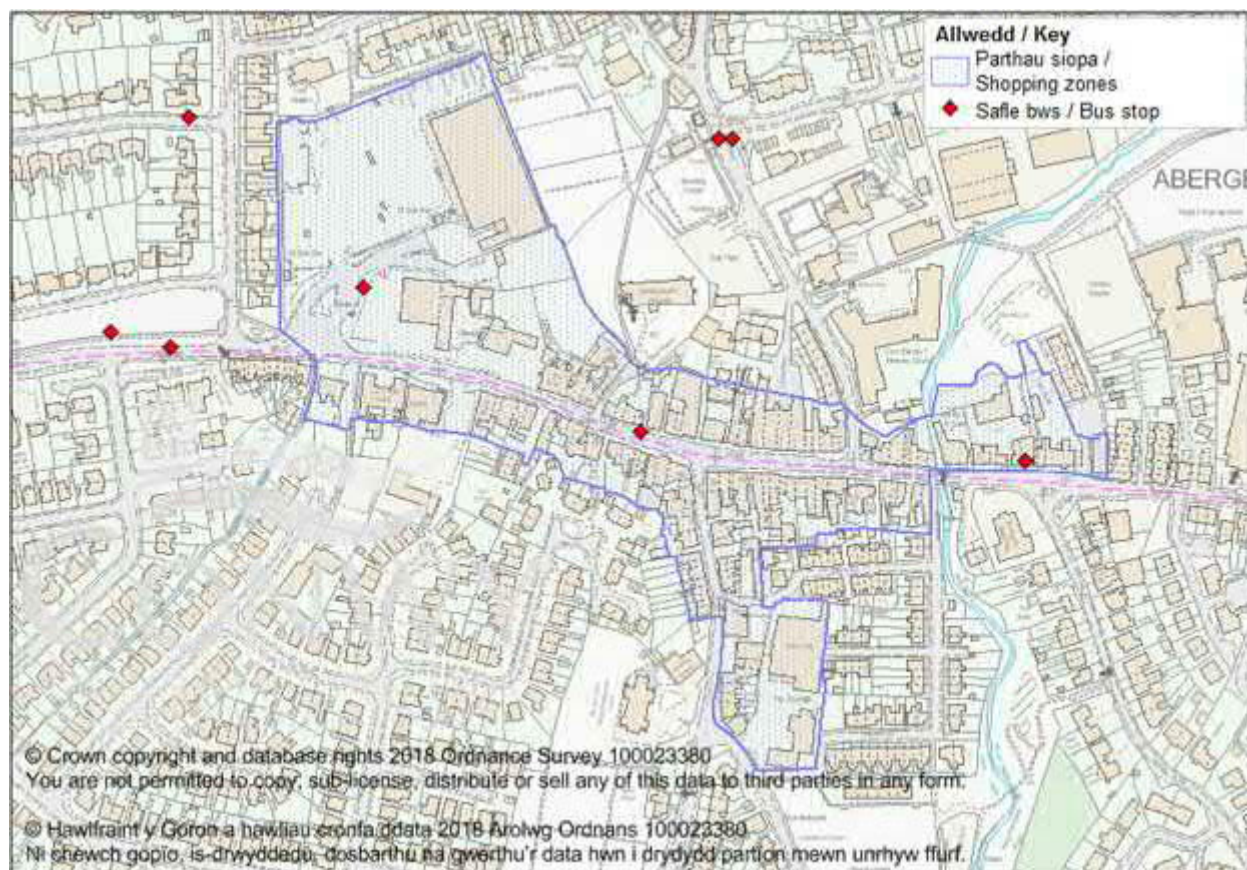
Source: Arriva Trains Wales

Route	Day	Inbound Journeys	Outbound Journeys	Total journeys per day
London - Birmingham - Crewe - Manchester - Chester - Holyhead	Monday-Friday	19	16	35
	Saturday	19	16	35
	Sunday*	10	11	21

- 11.5.1 Abergele Pensarn train station is some distance from the edge of the designated LDP Shopping Zone, and is separated from the town centre by the A55. There are a large number of services stopping at the station, but it is unlikely to be used as a form of transport by most shoppers.

### Map 30: Bus stops serving Abergele

Source: Environment, Roads & Facilities, Conwy County Borough Council



- 11.5.2 There are three bus stops in the LDP Shopping Zone of Abergele, with others nearby. The retail centre is well served by a range of bus routes all days of the week, although there are fewer services on a Sunday.

**Table 78: Buses serving Abergele (2018)**

Source: Arriva

Main route	Service days	Inbound Journeys	Outbound Journeys	Total journeys per day
<b>Number 12</b> Llandudno - Rhos-on-Sea - Colwyn Bay - Abergele - Towyn - Kinnel Bay - Rhyl	Mon-Fri	70	65	135
	Sat	70	65	135
	Sun	38	36	74
<b>Number 13</b> Llandudno - Mochdre - Colwyn Bay - Abergele - Prestatyn	Mon-Fri	20	20	40
	Sat	20	20	40
	Sun	9	9	18
<b>Number 21</b> Abergele - Rhyd-y-Foel - Betws-yn-Rhos - Colwyn Bay	Mon-Fri	4	7	11
	Sat	2	3	5
	Sun	-	-	-
<b>Number 43</b> Belgrano - Abergele - Llanfair TH	Mon-Fri	8	6	14
	Sat	6	7	13
	Sun	-	-	-

## 11.6 Vacancy rates

**Table 79: Vacancy rates in Abergele (2017)**

Source: Experian &amp; site visits

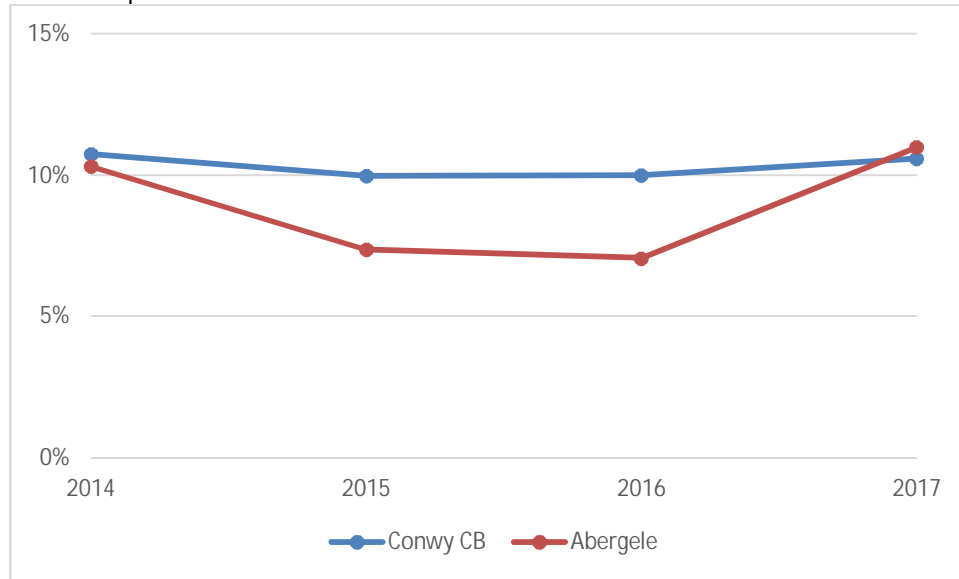
	Total number of retail units	Vacant	
		Number	%
<b>National large towns</b>	-	-	7%
<b>National small towns</b>	-	-	9%
<b>Conwy County Borough*</b>	907	96	11%
<b>Abergele Shopping Zone</b>	91	10	11%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

11.6.1 The vacancy rate in Abergele is 11%, which is comparable with the County Borough average, but higher than the national large town average. Six out of the ten vacant units were vacant for more than 12 months. This will need monitoring in future, as long-term vacancies are a concern. Looking at vacancies since LDP adoption in 2013, there has been a small increase in the last 12 months following a decrease in the two years prior, which has brought the levels back to as they were in 2014.

**Chart 28: Vacancies over time in Abergele**

Source: Experian and site visits



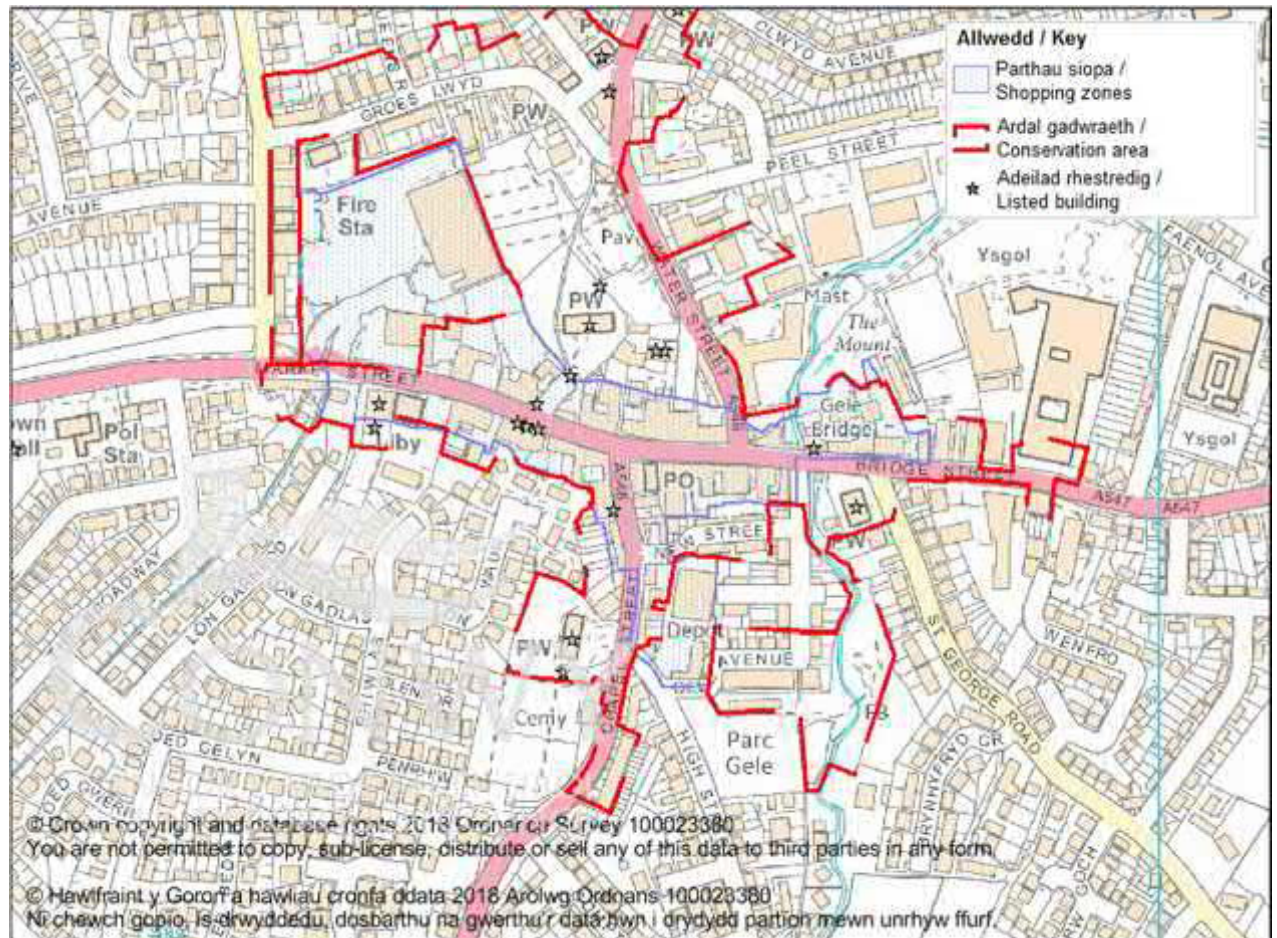
## 11.7 Natural and built environment

### Historic environment

- 11.7.1 The map below shows that there are some listed buildings in and around the town centre. It also shows the boundary of the designated Conservation Area. The Conservation Area has distinct key characteristics. These historic designations contribute towards the unique identity of Abergele.

#### Map 31: Historic designations in Abergele 2017/18

Source: Environment, Roads and Facilities, Conwy County Borough Council

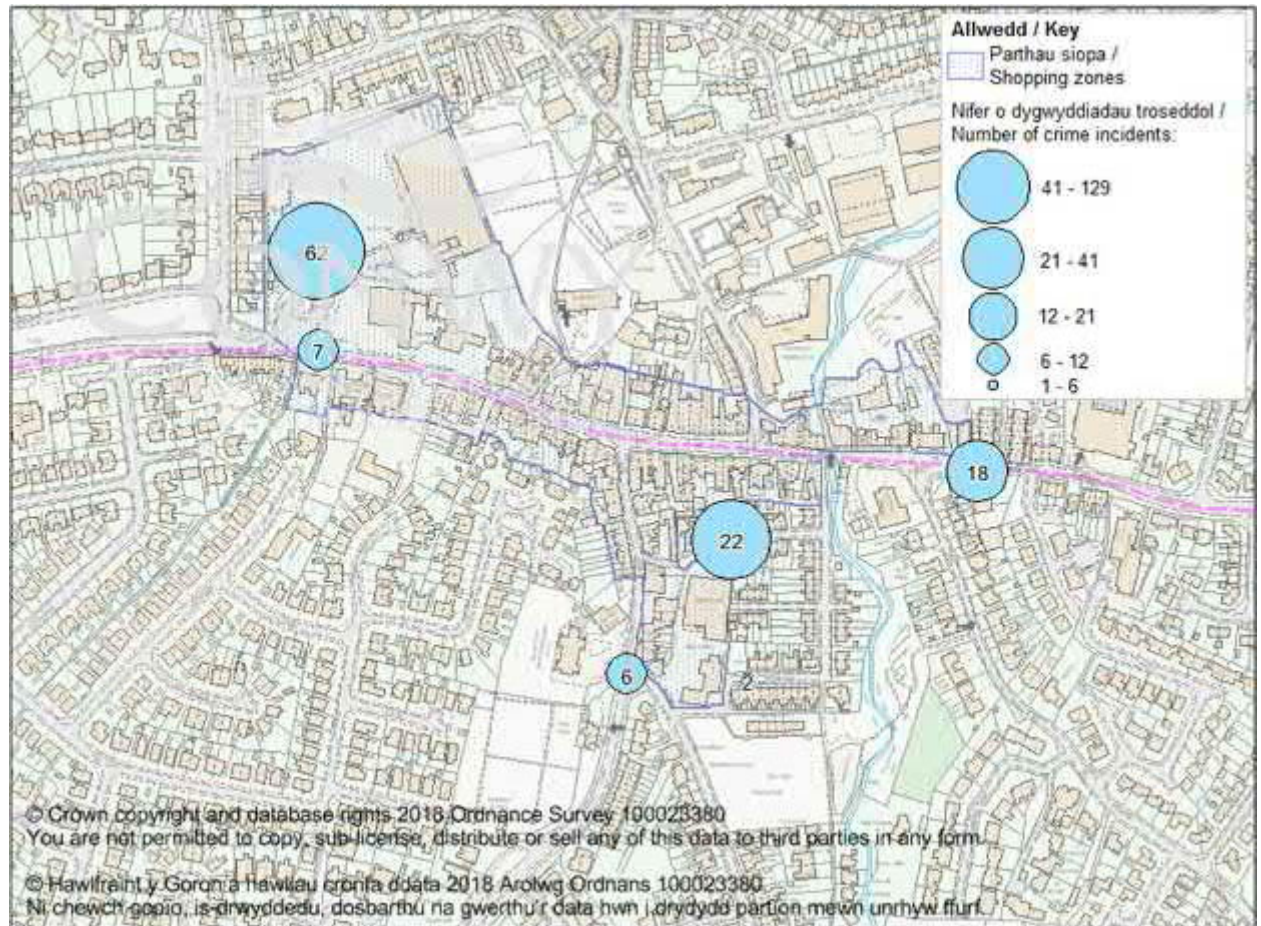


## 11.8 Crime and safety

11.8.1 There were 117 recorded crime incidents in the retail centre of Abergele in 2017/18. The map below shows that there are certain hotspots, where there are higher incidences of crime. Further analysis over time in future will be required to monitor trends.

**Map 32: Crime incidents in Abergele 2017/18**

Source: Home Office [www.Police.UK](http://www.Police.UK) website



## 12 Llanrwst

## 12.1 General introduction

12.1.1 Llanrwst is defined in the LDP retail hierarchy as a town centre. LDP designations include a Shopping Zone. In 2017, there were 86 retail units in the town centre designation.

### Map 33: LDP retail designations in Llanrwst

Source: Conwy LDP 2007-2022



## 12.2 Use classes

12.2.1 The level of A1 (shops) in Llanrwst at 59% is lower than the County Borough level, but higher than the national towns averages. A2 (financial and professional services) is higher and A3 (food and drink) use is similar, which shows that the retail; centre does have a range of uses, as sought by national planning policy. Hot food take away is higher than the national averages, but lower than across the County Borough.

**Table 80: Use classes in Llanrwst (2017)**

Source: Experian; CCBC site visits & Heart of our town report Colwyn Bay 2017 (People & Places Partnership)

	A1		A2		A3		A2 & A3		Hot food take away	
	No.	%	No.	%	No.	%	No.	%	No.	%
<b>National large towns average</b>		52%		13%		17%		30%		3%
<b>National small towns average</b>		52%		14%		16%		30%		4%
<b>Conwy County Borough*</b>		68%		12%		21%		32%		11%
<b>Llanrwst Shopping Zone</b>	51	59%	17	20%	18	21%	35	41%	7	8%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

12.2.2 Please see Appendix 2 for maps showing the distribution of use classes in the designated LDP areas.

**Table 81: Use classes over time in Llanrwst**

Source: Experian & CCBC site visits

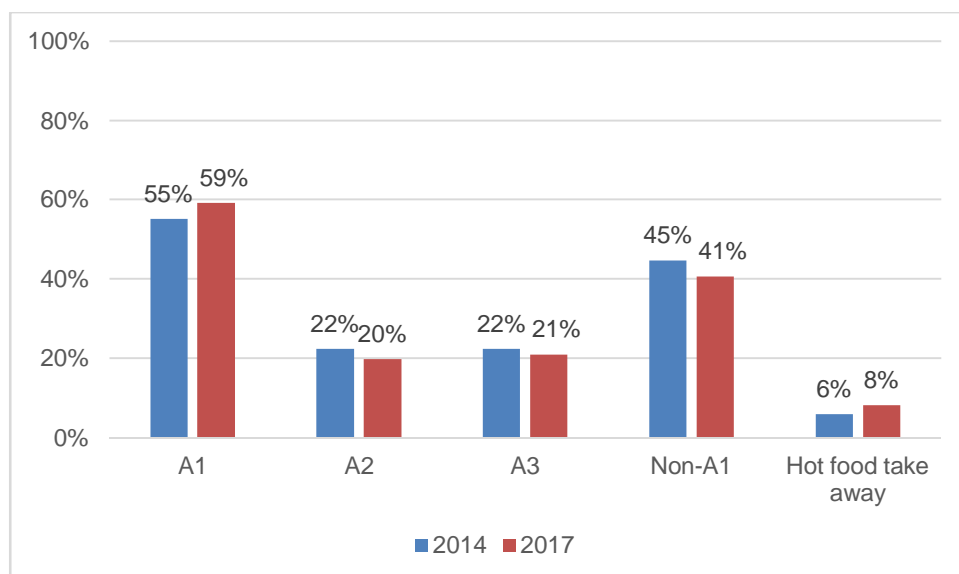
	Year	A1		A2		A3		Non-A1		Hot food take away	
		No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	523	66%	110	14%	164	21%	274	34%	44	6%
	<b>2017</b>	613	68%	107	12%	187	21%	294	32%	100	11%
<b>Llanrwst Shopping Zone</b>	<b>2014</b>	37	55%	15	22%	15	22%	30	45%	4	6%
	<b>2017</b>	51	59%	17	20%	18	21%	35	41%	7	8%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

12.2.3 There has been an increase in the number of units for all A use classes in Llanrwst between 2014 and 2017. A1 (shops) in particular has increased by 14 units, which is significant for a retail centre of this size. The level of non-A1 use has remained similar. The number of hot food take away units has, however, increased from four to seven units.

### Chart 29: Use classes over time in Llanrwst

Source: Experian & CCBC site visits



## 12.3 Retail sub-class

### Table 82: Retail sub-class in Llanrwst (2017)

Source: Experian & site visits

	Conwy County Borough*	Llanrwst Shopping Zone	
		No	%
<b>All units**</b>	871	79	
<b>Convenience</b>	8%	9	11%
<b>Comparison</b>	40%	22	28%
<b>Service</b>	52%	48	61%
<b>Financial &amp; business services</b>	9%	11	14%
<b>Health &amp; medical services</b>	1%	2	3%
<b>Leisure services</b>	25%	18	23%
<b>Public services</b>	2%	3	4%
<b>Retail services</b>	14%	14	18%
<b>Vehicle &amp; transport services</b>	1%	0	0%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail

12.3.1 Llanrwst has a relatively low level of comparison units when compared with the County Borough average. This is to be expected, as residents are likely to travel to larger centres for comparison goods. It has a higher level of convenience and service units than the County Borough average, which is encouraged by national retail policy. This is

across a wide range of services, indicating that there is a good range of sub-class in this retail centre.

**Table 83: Retail sub-class over time in Llanrwst**

Source: Experian & site visits

	Year	Total units**	Convenience No.	%	Comparison No.	%	Service No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	879		9%		40%		51%
	<b>2017</b>	871		8%		40%		52%
<b>Llanrwst Shopping Zone</b>	<b>2014</b>	83	10	12%	21	25%	52	63%
	<b>2017</b>	79	9	11%	22	28%	48	61%

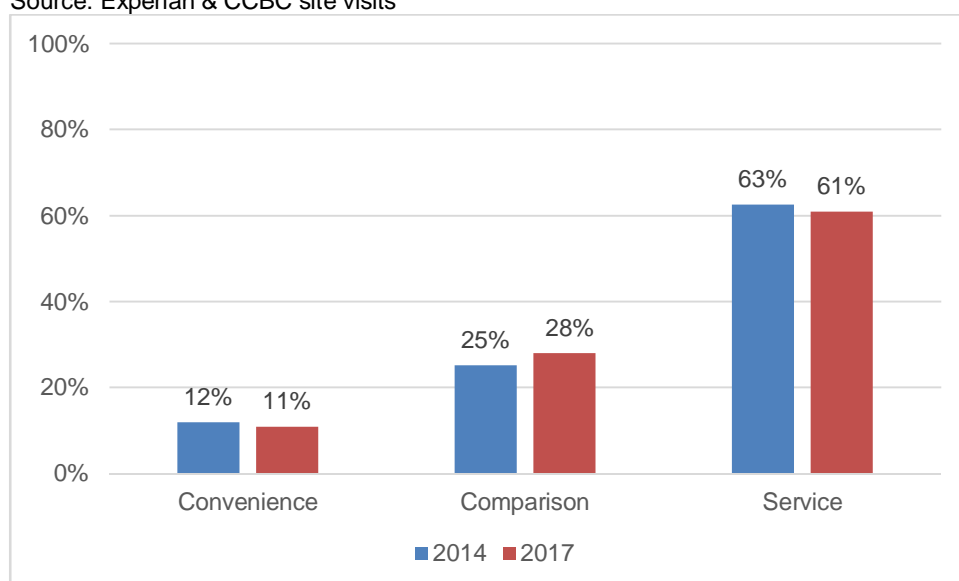
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*includes other uses to retail. Does not include vacancies.

12.3.2 The levels of retail sub-class has changed since 2014 in Llanrwst. The level of convenience and service units has decreased by one unit. The level of service units has dropped by four, which is a significant change for a retail centre of this size. Comparison has seen an increase of one unit.

**Chart 30: Retail sub-class over time in Llanrwst**

Source: Experian & CCBC site visits



## 12.4 Key attractors and multiple traders

**Table 84: Key attractors and multiple traders in Llanrwst (2017)**

Source: Experian, Heart of our town report Colwyn Bay 2017 (People & Places Partnership) & CCBC site visits

	Conwy County Borough*	National average		Llanrwst Shopping Zone	
		Large towns	Small Towns	No	%
<b>All A1 retail units**</b>	542			44	
<b>Key attractor</b>	4%	10%	7%	0	0%
<b>Multiple trader</b>	16%	25%	19%	3	7%
<b>Regional trader</b>	2%	10%	10%	1	2%
<b>Independent trader</b>	72%	56%	64%	38	86%
<b>Charity shops</b>	6%	-	-	2	5%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

12.4.1 Independent trader retail units form the majority of retail in Llanrwst, and is higher than the levels seen in the national averages. This contributes towards Llanrwst having a unique sense of character. There are three national multiple trader brands, which is lower than the national averages, but higher than similar sized towns in the County Borough. This reflects the size of the retail centre.

**Table 85: Key attractors and multiple traders over time in Llanrwst**

Source: Experian & CCBC site visits

	Year	Total A1**	Key attractor		Multiple trader		Regional trader		Independent trader		Charity	
			No.	%	No.	%	No.	%	No.	%	No.	%
<b>Conwy County Borough*</b>	<b>2014</b>	538	21	4%	111	21%	5	1%	361	67%	40	7%
	<b>2017</b>	542	19	4%	88	16%	9	2%	391	72%	35	6%
<b>Llanrwst Shopping Zone</b>	<b>2014</b>	42	0	0%	3	7%	1	2%	36	86%	2	5%
	<b>2017</b>	44	0	0%	3	7%	1	2%	38	86%	2	5%

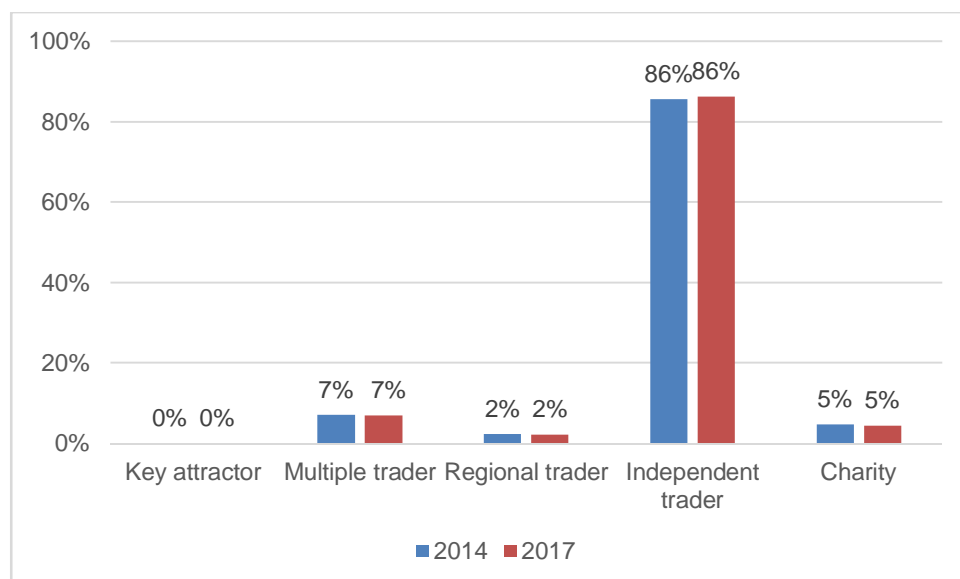
\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

\*\*Does not include vacant units

12.4.2 There has been very little change in the balance between the larger national retail brands and local independent traders in Llanrwst since the LDP was adopted. The number of independent traders has increased by two units, but there has been no change to the level of representation.

### Chart 31: Key attractors and multiple traders over time in Llanrwst

Source: Experian & CCBC site visits



## 12.5 Accessibility

### Public transport

#### Table 86: Trains serving Llanrwst (2018)

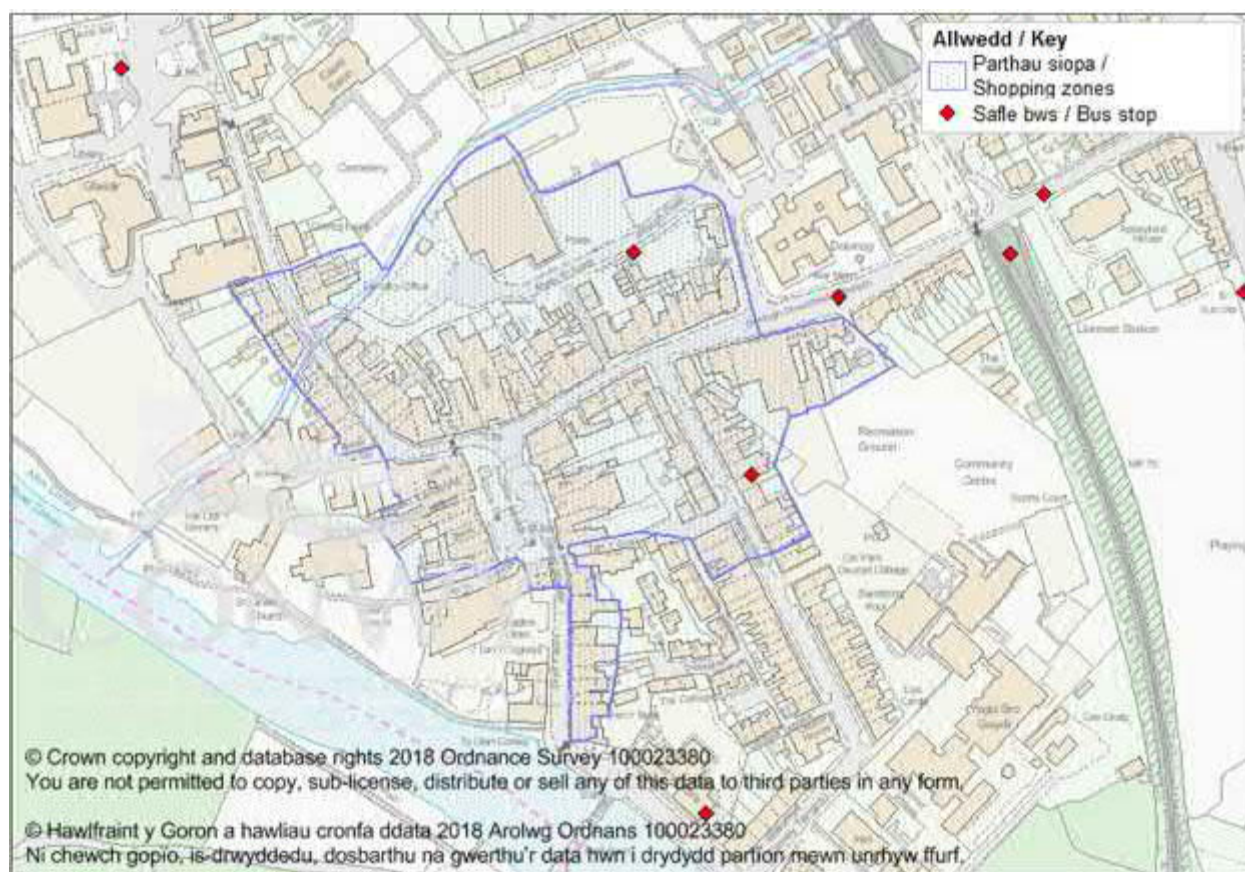
Source: Arriva Trains Wales

Route	Day	Inbound Journeys	Outbound Journeys	Total journeys per day
Llandudno – Blaenau Ffestiniog	Monday-Friday	6	6	12
	Saturday	6	6	12
	Sunday*	-	-	-

- 12.5.1 Llanrwst train station is 140 metres from the edge of the designated LDP Shopping Zone. There is a small number of services Monday-Saturday, which link Llanrwst to other parts of the Conwy Valley. There is no Sunday service.

### Map 34: Bus stops serving Llanrwst

Source: Environment, Roads & Facilities, Conwy County Borough Council



- 12.5.2 There are two bus stops in the LDP Shopping Zone of Llanrwst, with others nearby. The retail centre is well served by a range of bus routes, although there are fewer services on a Sunday.

**Table 87: Buses serving Llanrwst (2018)**

Source: Arriva

Main route	Service days	Inbound Journeys	Outbound Journeys	Total journeys per day
<b>Number 19</b> Cwm Penmachno - Betws-y-Coed - Llanrwst - Conwy - Llandudno Junction - Llandudno	Mon-Fri Sat Sun	15 16 7	14 14 6	29 30 13
<b>Number 42</b> Llangernyw - Llanrwst	Mon-Fri* Sat Sun	2 2 -	2 2 -	4 4 -
<b>Number 68A</b> Llanrwst - Llanddoged - Llanrwst (circular service)	Mon-Fri Sat Sun	3 3 -	3 3 -	3 3 -
<b>Number 68B</b> Llanrwst - Nebo - Capel Garmon - Llanrwst (circular service)	Mon-Fri** Sat Sun	2 - -	2 - -	2 - -
<b>Number 68C</b> Llanrwst - Gwytherin - Llanrwst (circular service)	Mon-Fri*** Sat Sun	2 - -	2 - -	2 - -
<b>Number 68D</b> Llanrwst - Melin-y-Coed - Llanrwst (circular service)	Mon-Fri**** Sat Sun	2 2 -	2 2 -	2 4 -
<b>Number X19</b> Blaenau Ffestiniog - Dolwyddelan - Betws-y-Coed - Llanrwst - Conwy - Llandudno Junction - Deganwy - Llandudno	Mon-Fri Sat Sun	8 8 4	9 9 4	17 17 8

\*operates Tuesday only

\*\*operates Tuesday and Friday only

\*\*\*operates Monday and Wednesday only

\*\*\*\*operates Thursday only

## 12.6 Vacancy rates

**Table 88: Vacancy rates in Llanrwst (2017)**

Source: Experian & site visits

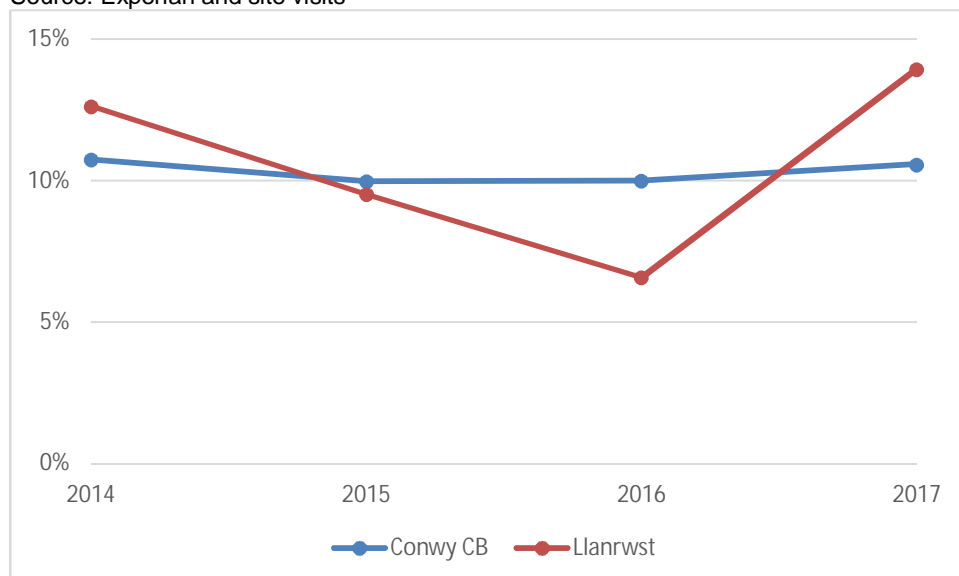
	Total number of retail units	Vacant	
		Number	%
<b>National large towns</b>	-	-	7%
<b>National small towns</b>	-	-	9%
<b>Conwy County Borough*</b>	907	96	11%
<b>Llanrwst Shopping Zone</b>	86	12	14%

\*This is the total for the designated LDP Primary Shopping Area and Shopping Zones only.

12.6.1 The vacancy rate in Llanrwst is higher than the County Borough and national small towns average at 14%. Most of these units have been vacant for more than 12 months. This will need monitoring in future, as long-term vacancies are a concern. Looking at vacancies since LDP adoption in 2013, there was a decline from 2014 to 2016, but an increase in the last 12 months has seen levels return to similar to 2014.

**Chart 32: Vacancies over time in Llanrwst**

Source: Experian and site visits



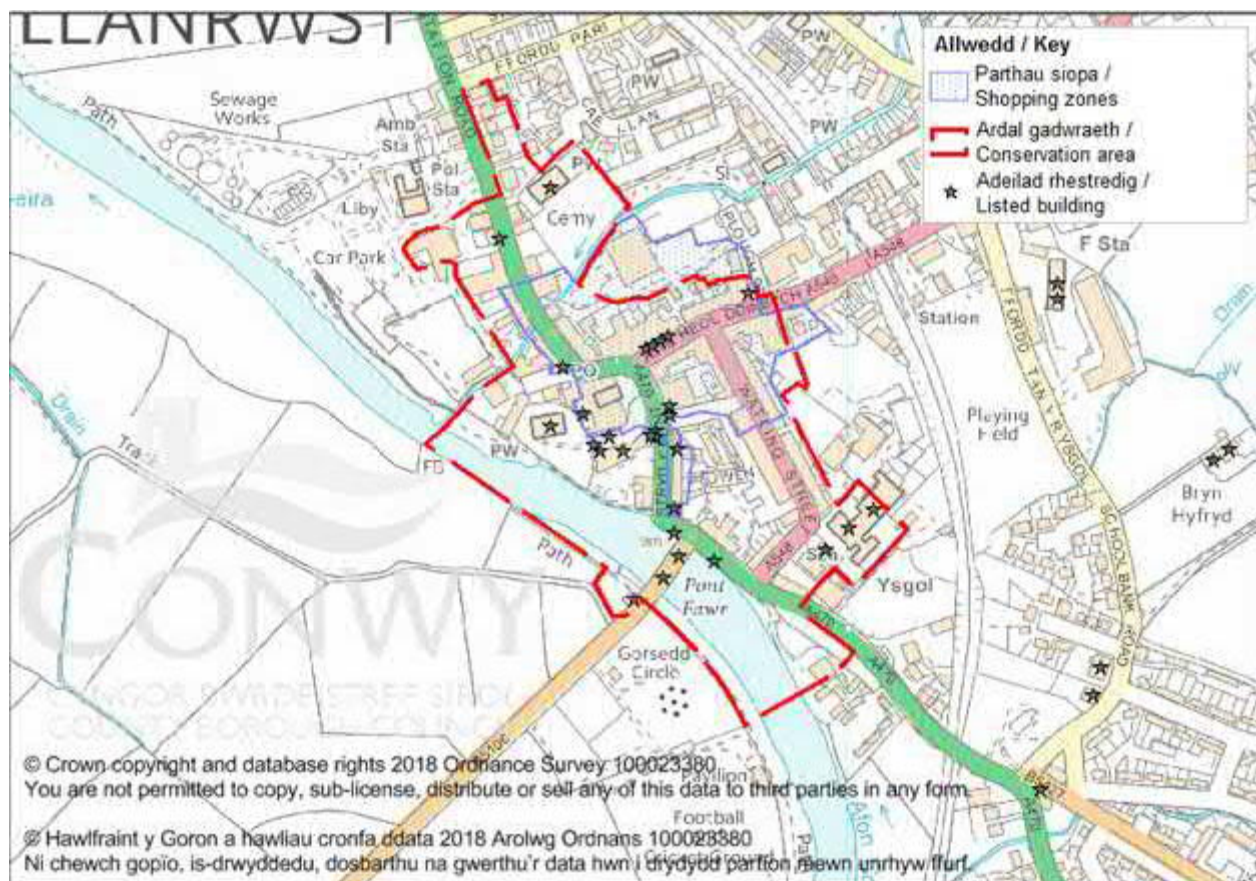
## 12.7 Natural and built environment

## Historic environment

12.7.1 The map below shows that there are listed buildings in the town centre. It also shows the boundary of the designated Conservation Area. The Conservation Area has distinct key characteristics. These historic designations contribute towards the unique identity of Llanrwst.

### Map 35: Historic designations in Llanrwst 2017/18

Source: Environment, Roads and Facilities, Conwy County Borough Council

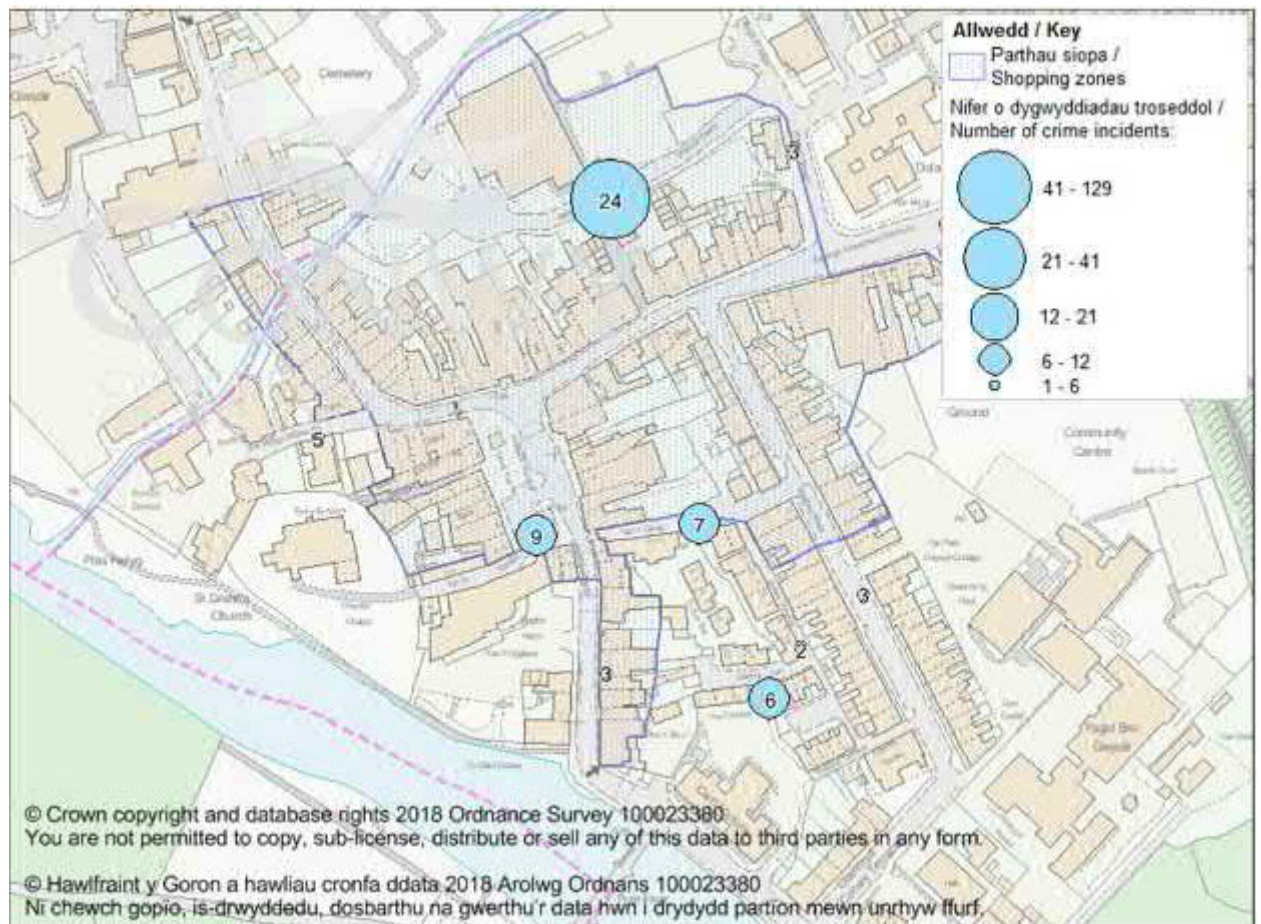


## 12.8 Crime and safety

12.8.1 There were 63 recorded crime incidents in the retail centre of Llanrwst in 2017/18. The map below shows that there are no significant hotspots, where there are higher incidences of crime and that crime is low in this area. Further analysis over time in future will be required to monitor trends.

**Map 36: Crime incidents in Llanrwst 2017/18**

Source: Home Office [www.Police.UK](http://www.Police.UK) website, 2018



## Appendix 1: Glossary

**Attractiveness:** in the facilities and character which draw in trade (from TAN4).

**Comparison goods:** clothing, shoes, furniture, household appliances, tools, medical goods, games and toys, books and stationery, jewellery and other personal effects.

**Convenience goods:** food and non-alcoholic beverages, tobacco, alcoholic beverages, newspapers and periodicals and non-durable household goods.

**Independent traders:** are identified as those that are specifically local to your town centre (from Action for Market Towns/Experian).

**Key attractors:** (from Action for Market Towns/Experian)

### Department Stores

Debenhams  
House of Fraser  
John Lewis  
Marks and Spencer

### Mixed Goods Retailers

Argos  
Boots  
TK Maxx  
WH Smith  
Wilkinsons

### Clothing

Burton  
Dorothy Perkins  
H & M  
New Look  
Primark  
River Island  
Topman  
Topshop  
Next

### Supermarkets

Sainsbury's  
Tesco  
Waitrose

### Other Retailers

Carphone Warehouse  
Clarks  
 Clintons  
HMV  
O2  
Superdrug  
Phones 4 U  
Vodafone  
Waterstones

**Multiple traders:** have a countrywide presence and are well known household names, but do not feature on the Key Attractors list (from Action for Market Towns/Experian).

**Regional traders:** are identified as those with stores / units in several towns throughout one geographical region only (from Action for Market Towns/Experian).

**Vitality:** is reflected in how busy a centre is at different times and in different parts (from TAN4).

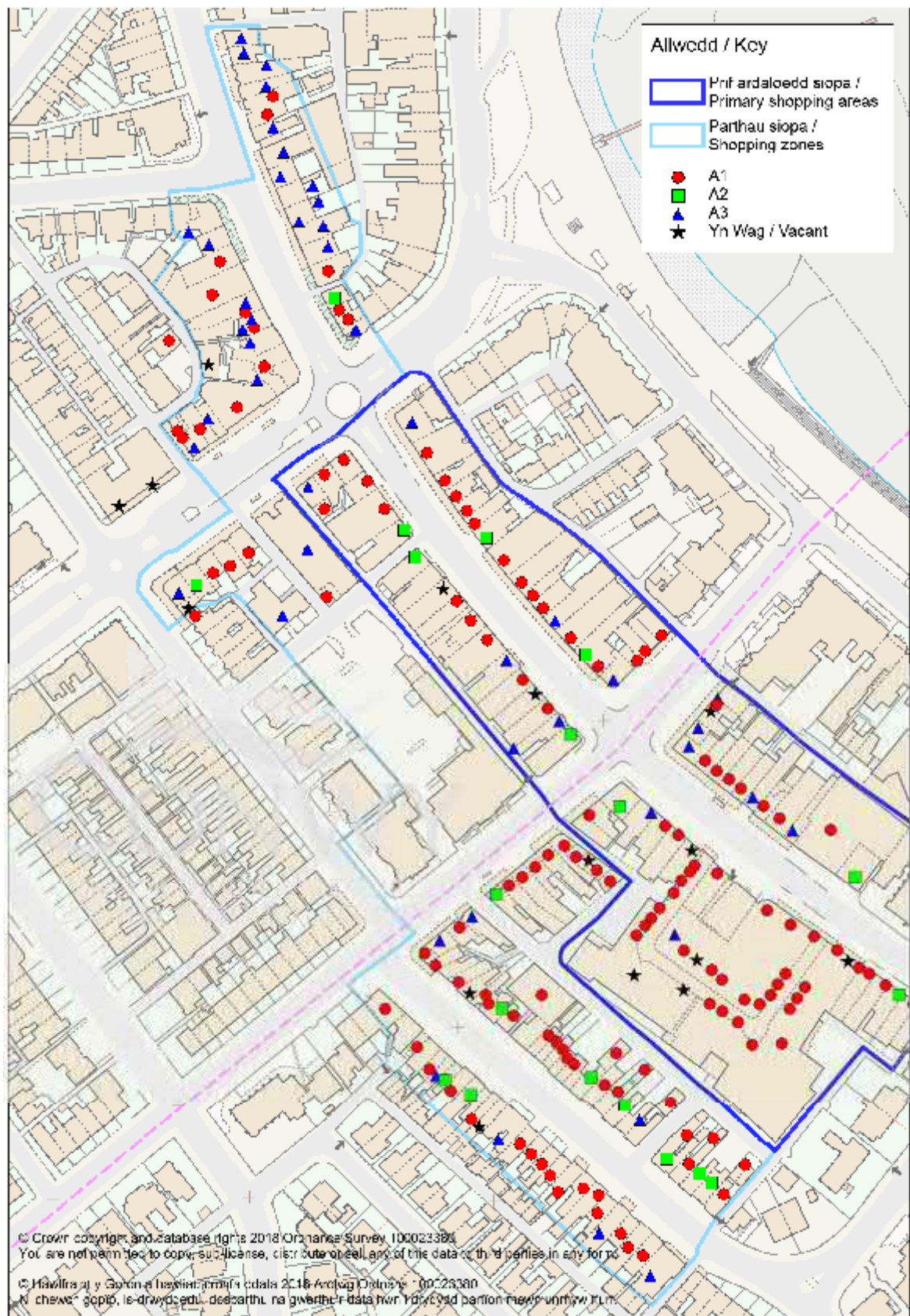
**Viability:** is the ability of the centre to attract investment, not only to maintain the fabric but also to allow for improvement and adaptation to changing needs (from TAN4).

## Use classes

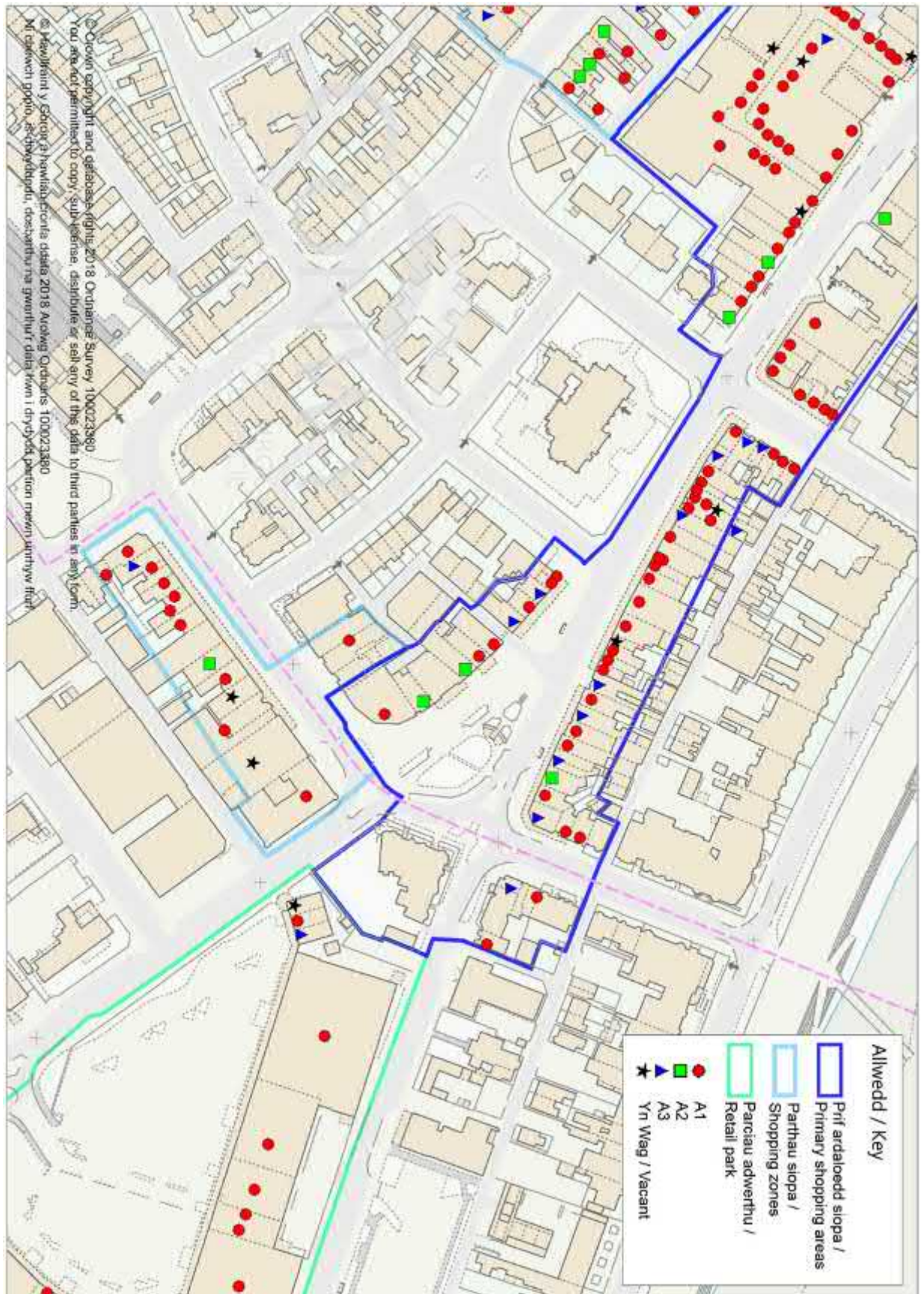
<b>A1</b> Shops	Shops, Retail Warehouses, Post Offices, Ticket and Travel Agencies, Sale of Cold Food for Consumption off premises, Hairdressers, Funeral Directors, Dry Cleaners, Internet Cafes	No permitted change
<b>A2</b> Financial and Professional Services	Banks, Building Societies, Estate and Employment Agencies, Professional and Financial Services, Betting Offices	Permitted change to Class A1 where there is a display window at ground floor level
<b>A3</b> Food and Drink	Restaurants, Cafes, Hot Food Takeaways, Pubs, Bars, Other Drinking Establishments	Permitted change to Class A1 where there is a display window at ground floor level and Class A2

## Appendix 2: Use classes maps

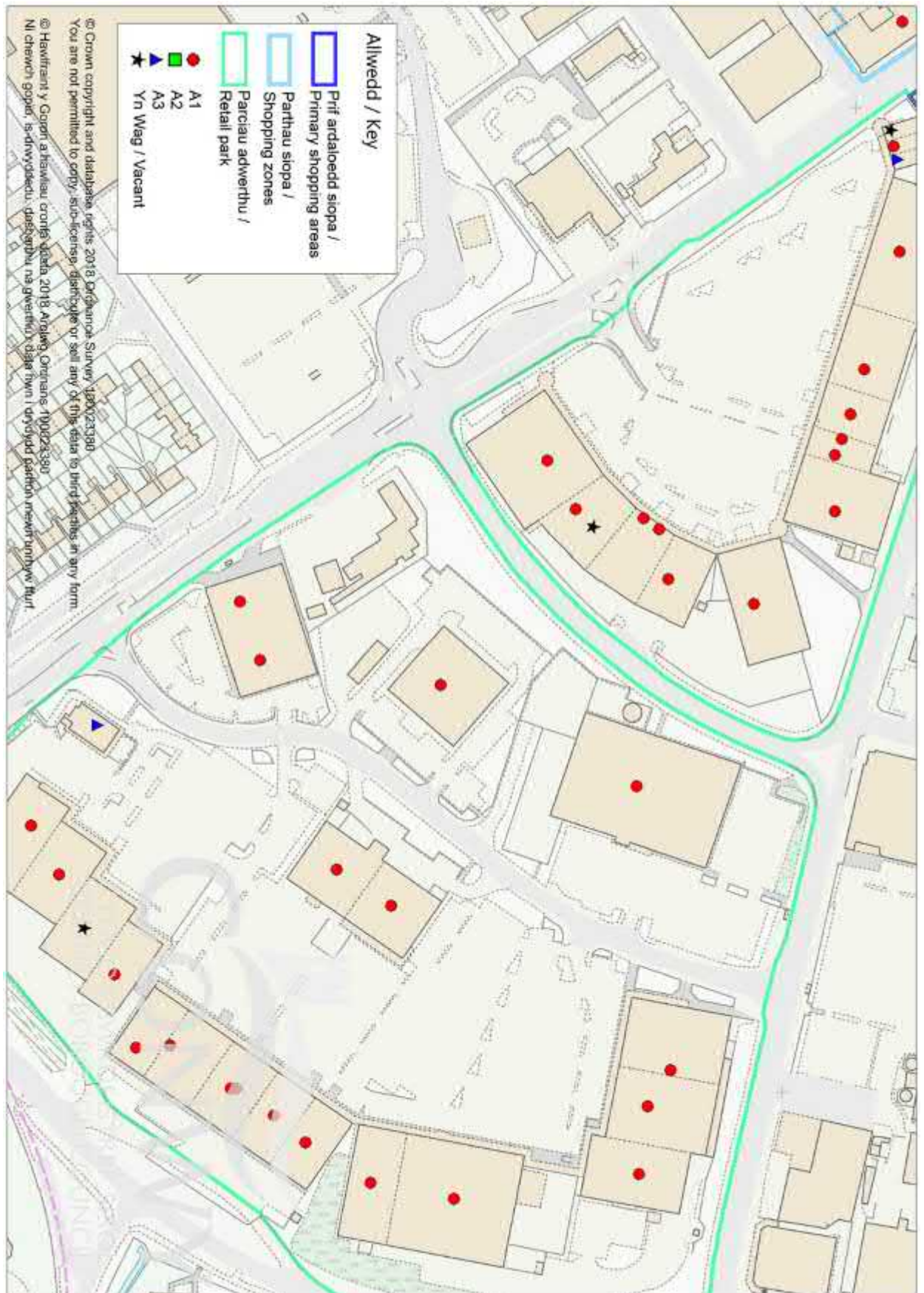
### Llandudno



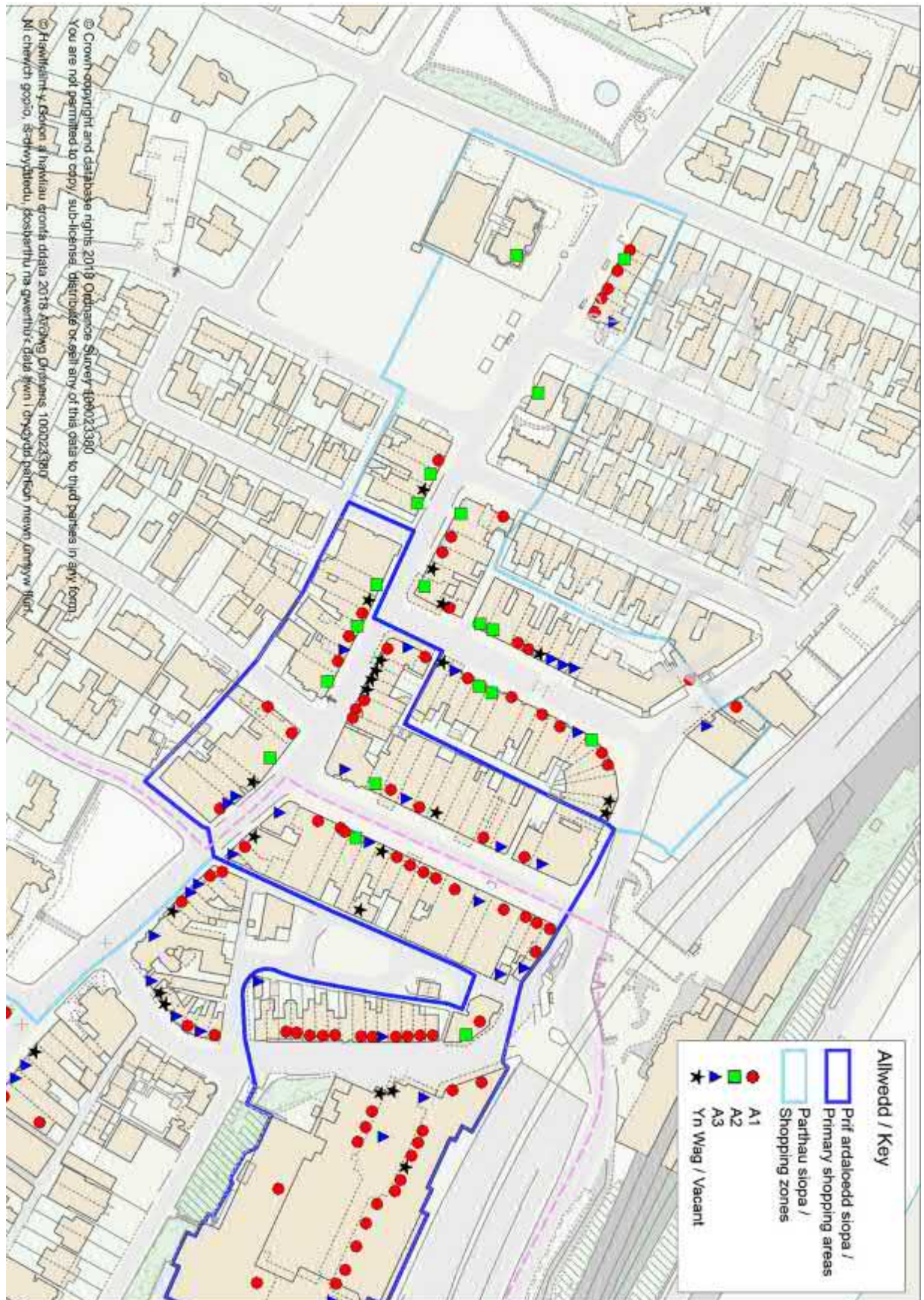
## Llandudno



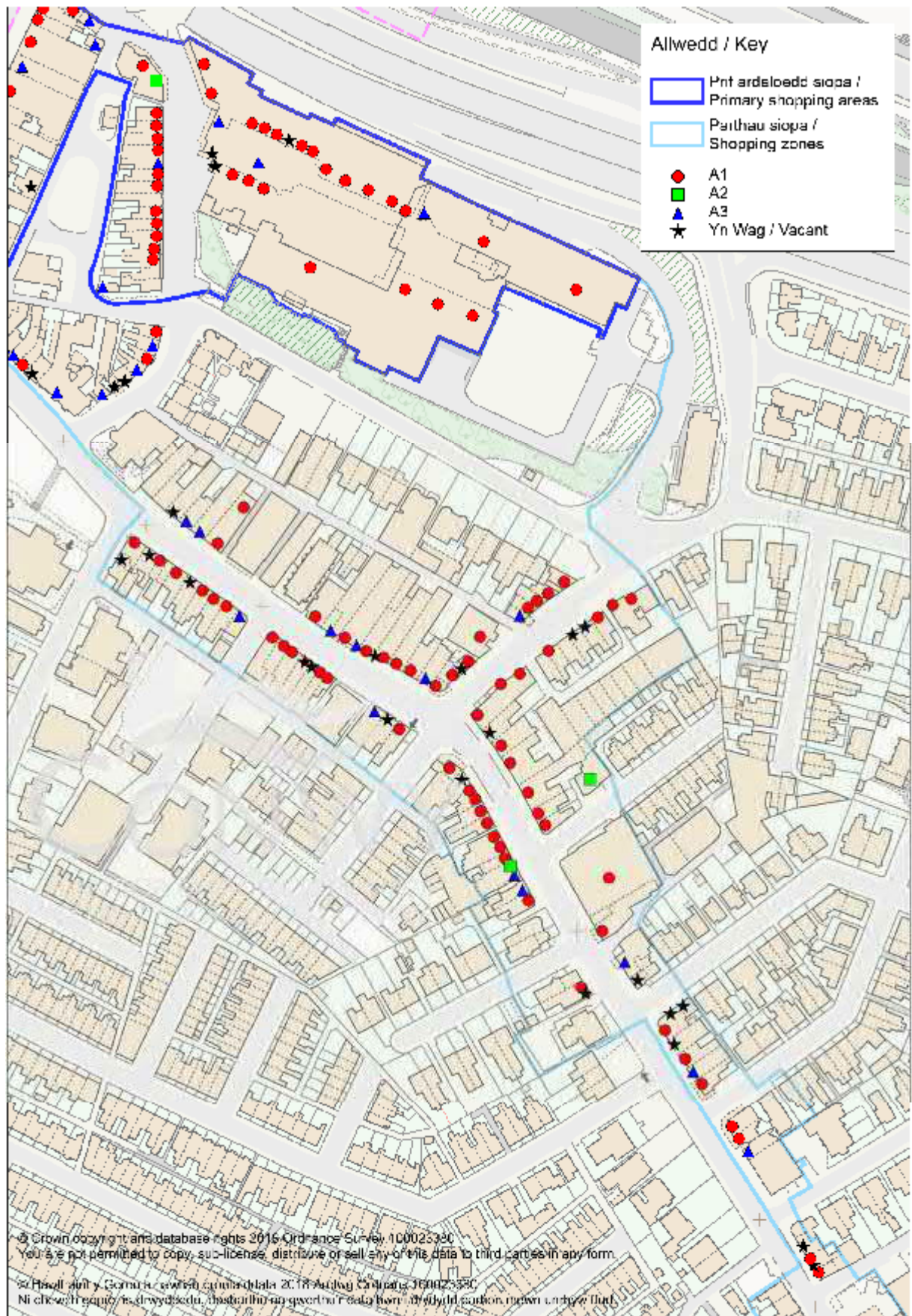
## Llandudno



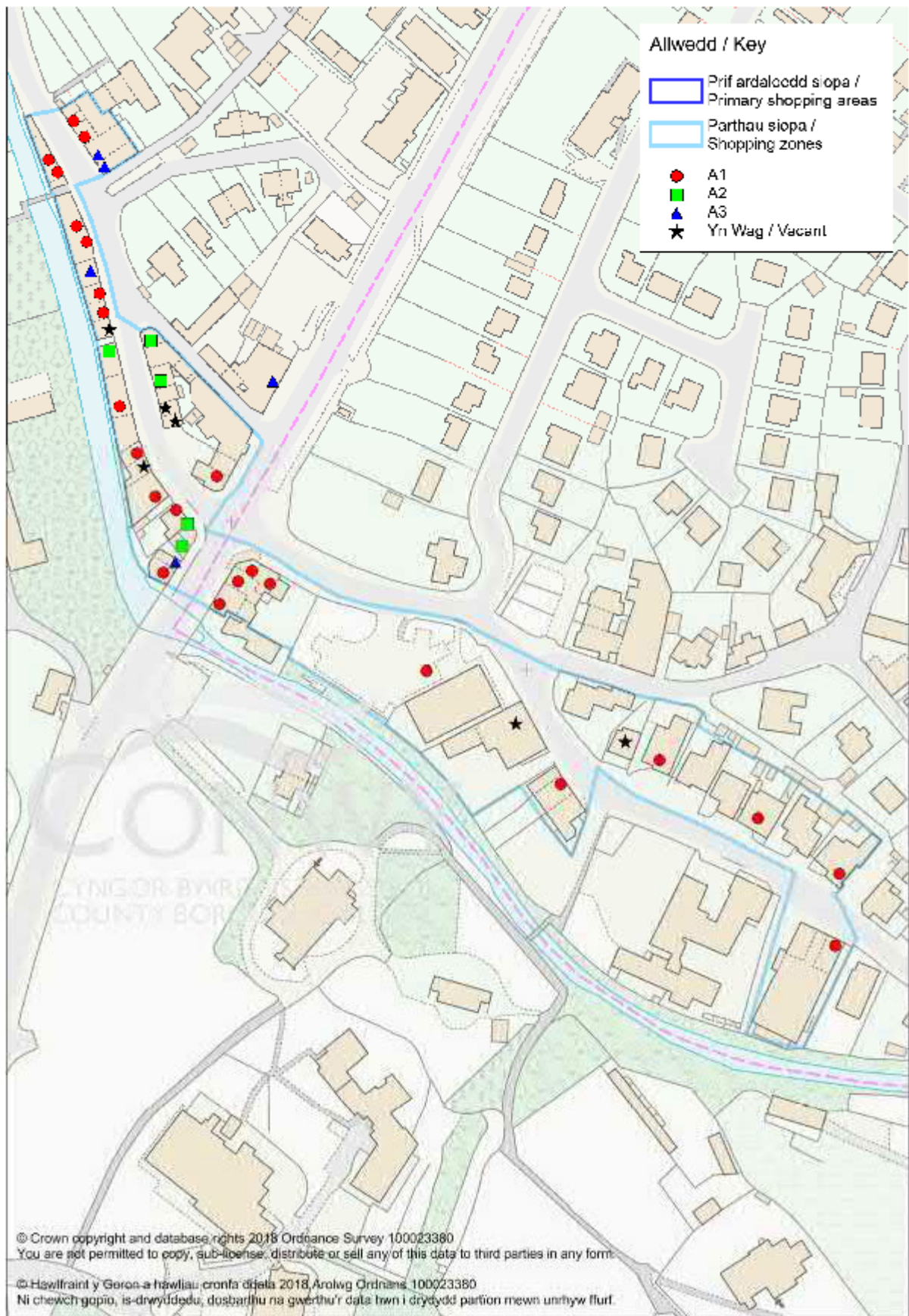
## Colwyn Bay



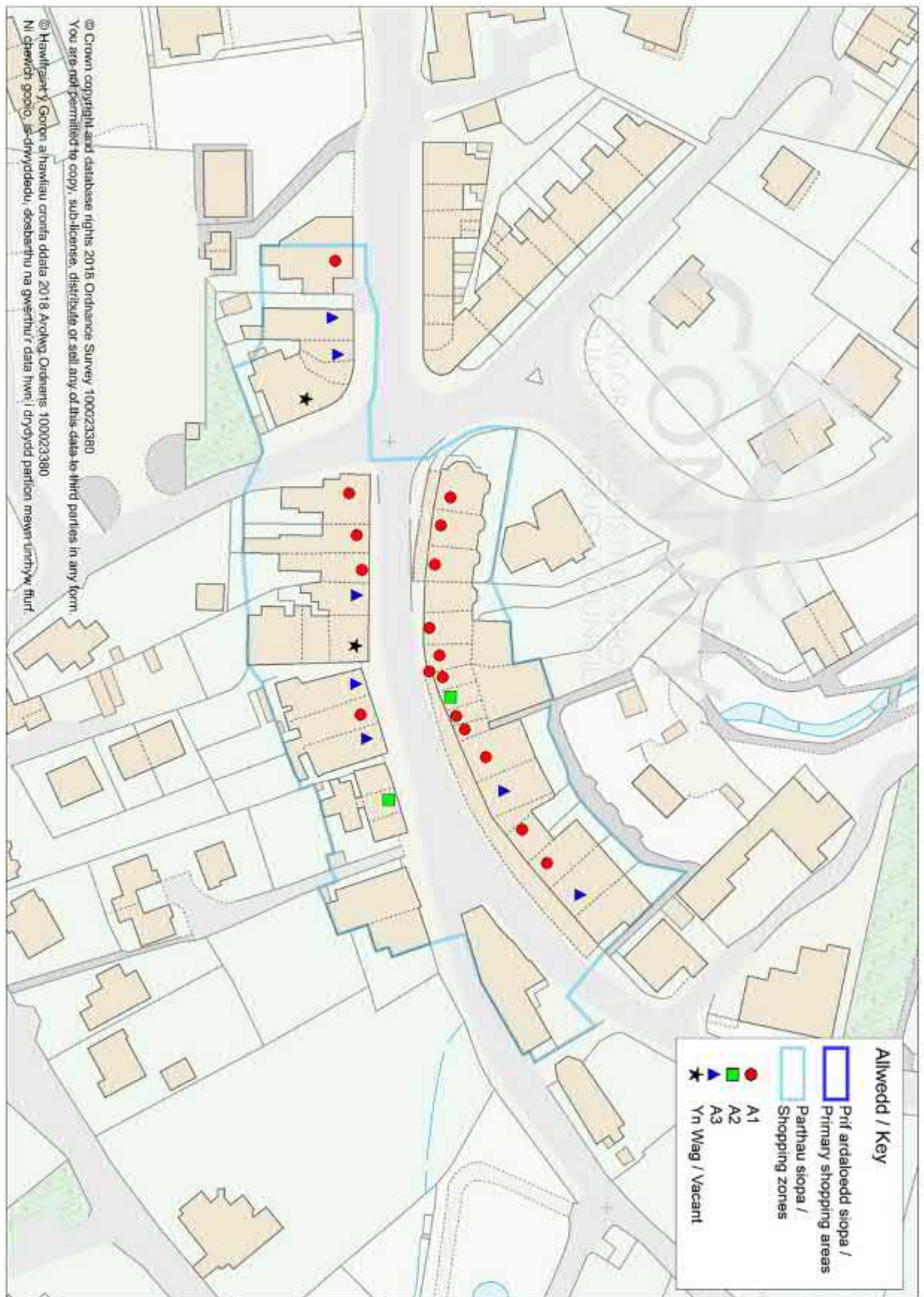
## Colwyn Bay



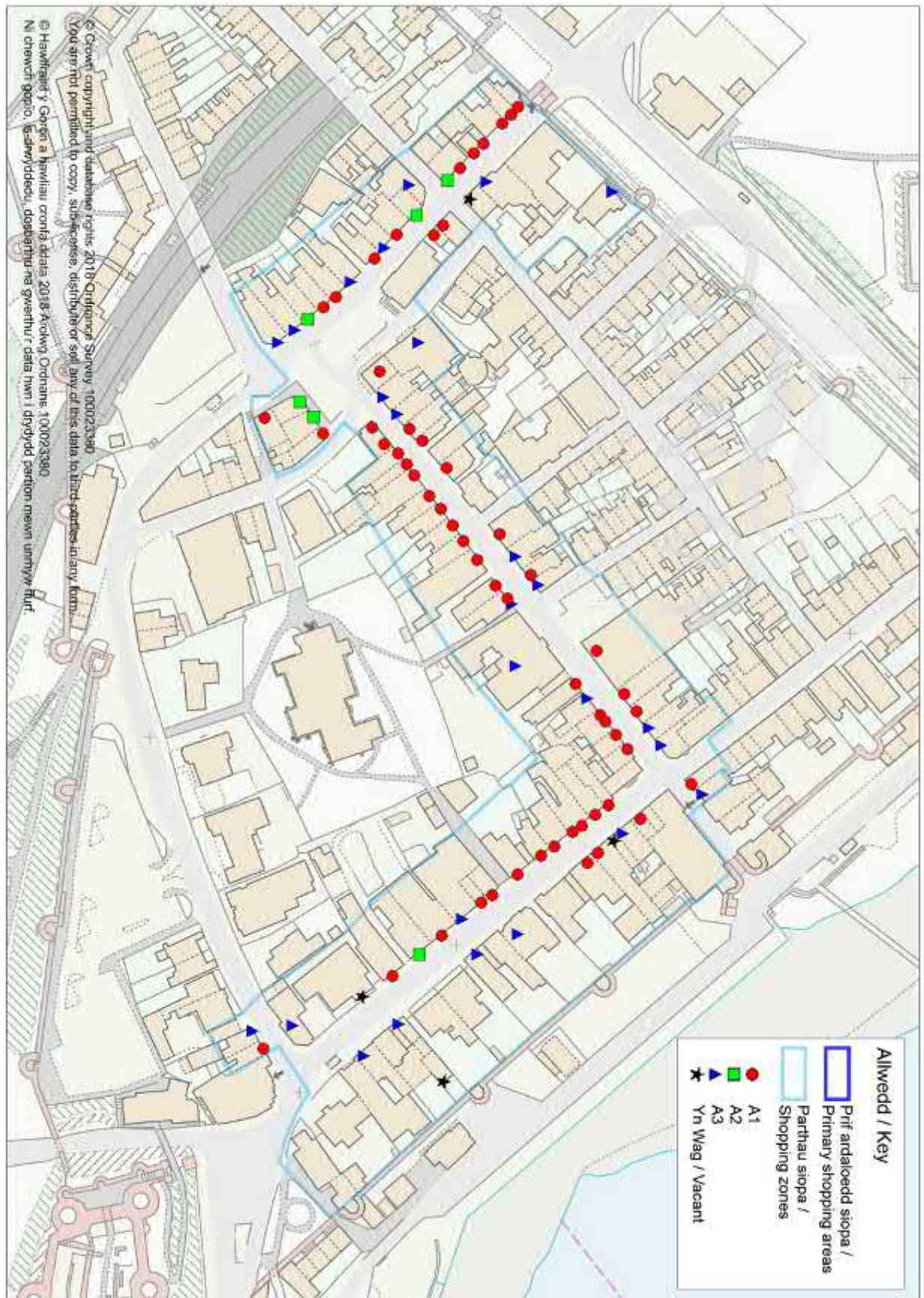
## Llanfairfechan



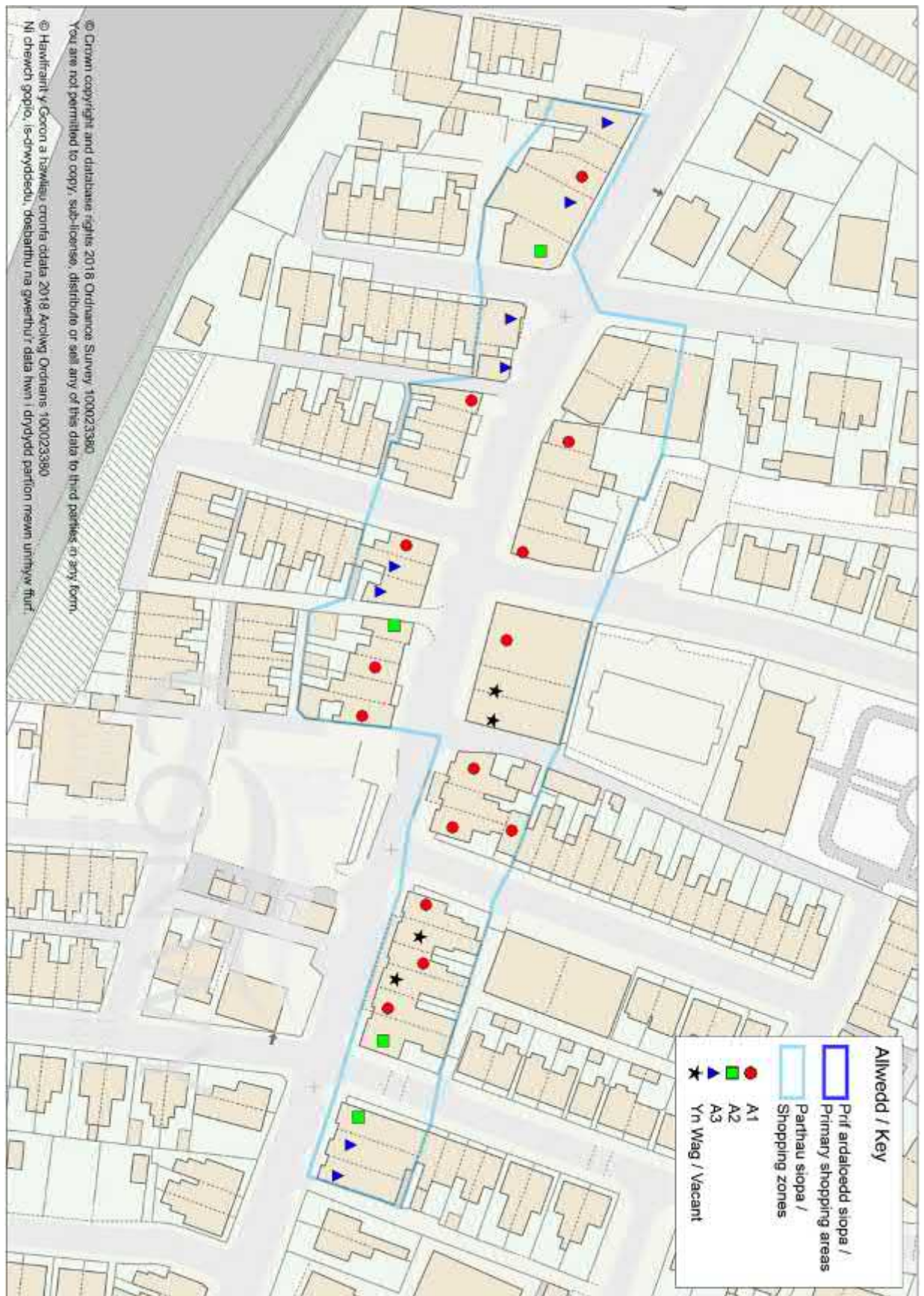
## Penmaenmawr



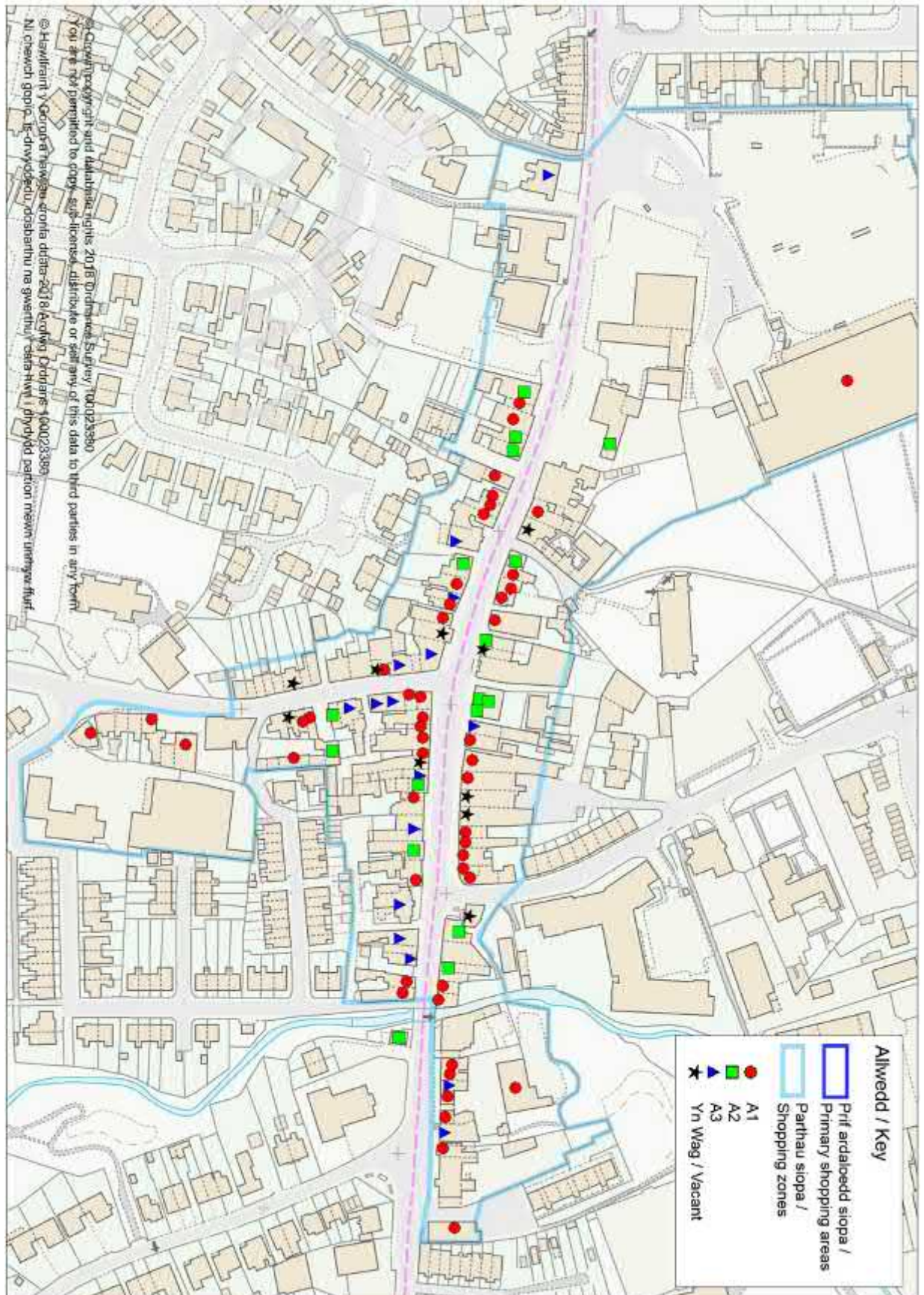
## Conwy



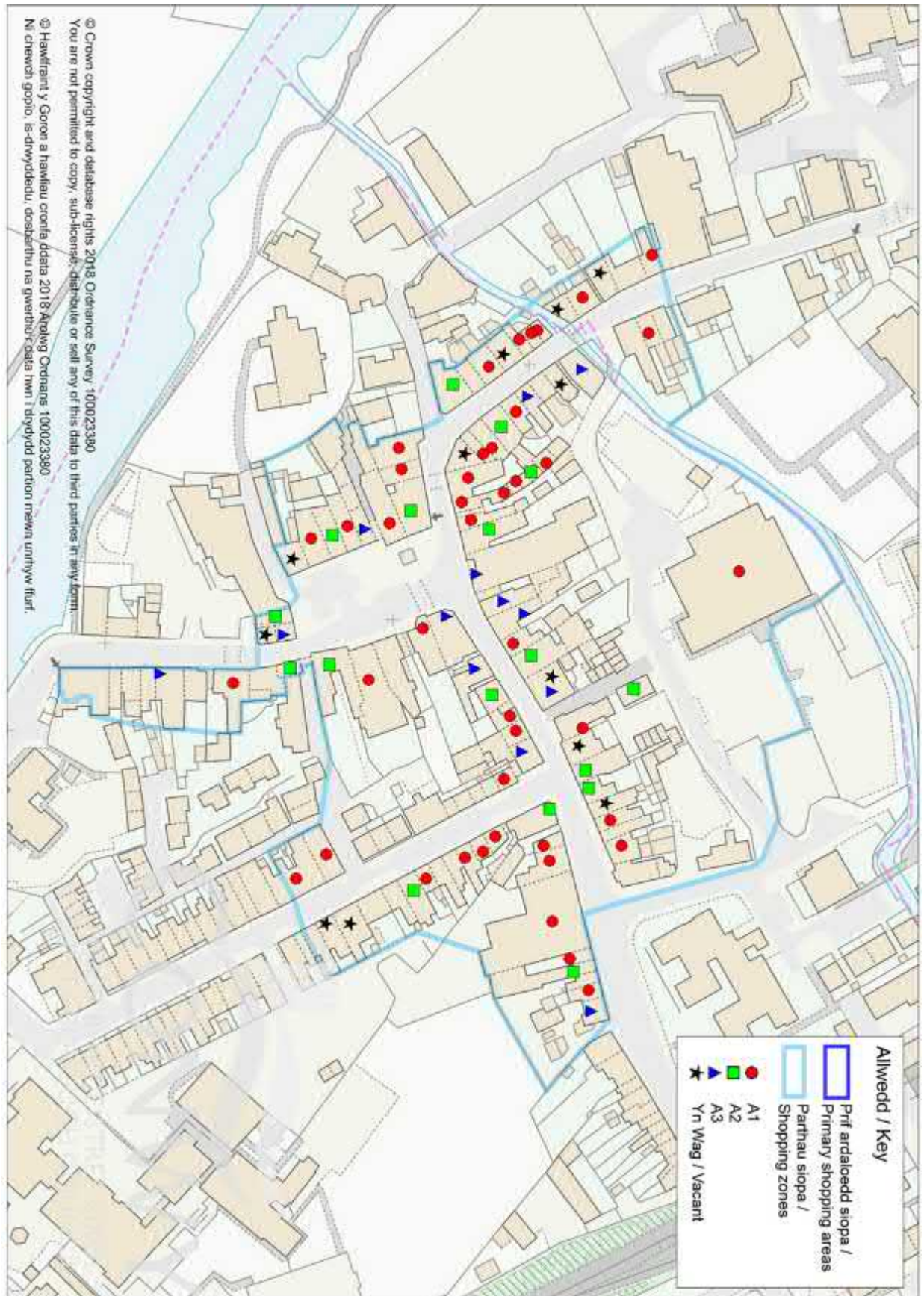
## Llandudno Junction



## Abergele



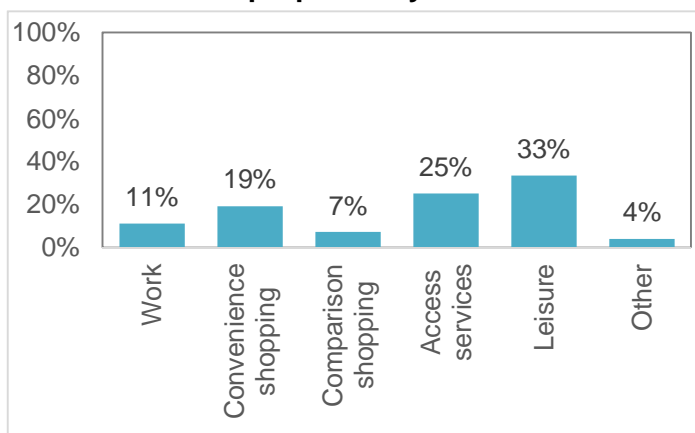
## Llanrwst



## Appendix 3: Town centre survey results

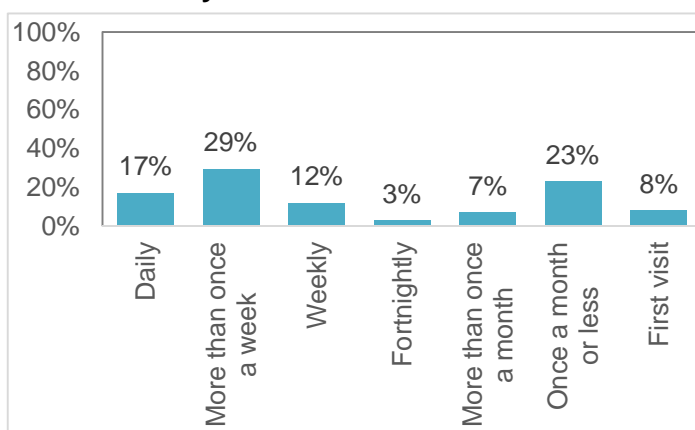
### Town centre users survey results (Llandudno)

#### What is the main purpose of your visit to the town centre today?



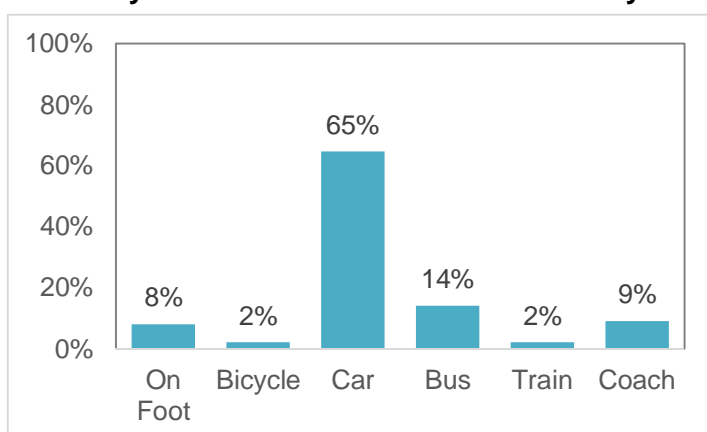
Work	11	11%
Convenience shopping	19	19%
Comparison shopping	7	7%
Access services	25	25%
Leisure	33	33%
Other	4	4%

#### How often do you visit the town centre?



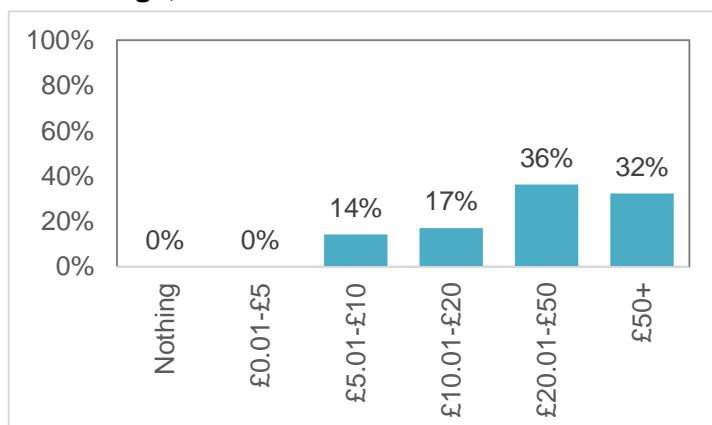
Daily	17	17%
More than once a week	29	29%
Weekly	12	12%
Fortnightly	3	3%
More than once a month	7	7%
Once a month or less	23	23%
First visit	8	8%

#### How did you travel into the town centre today?



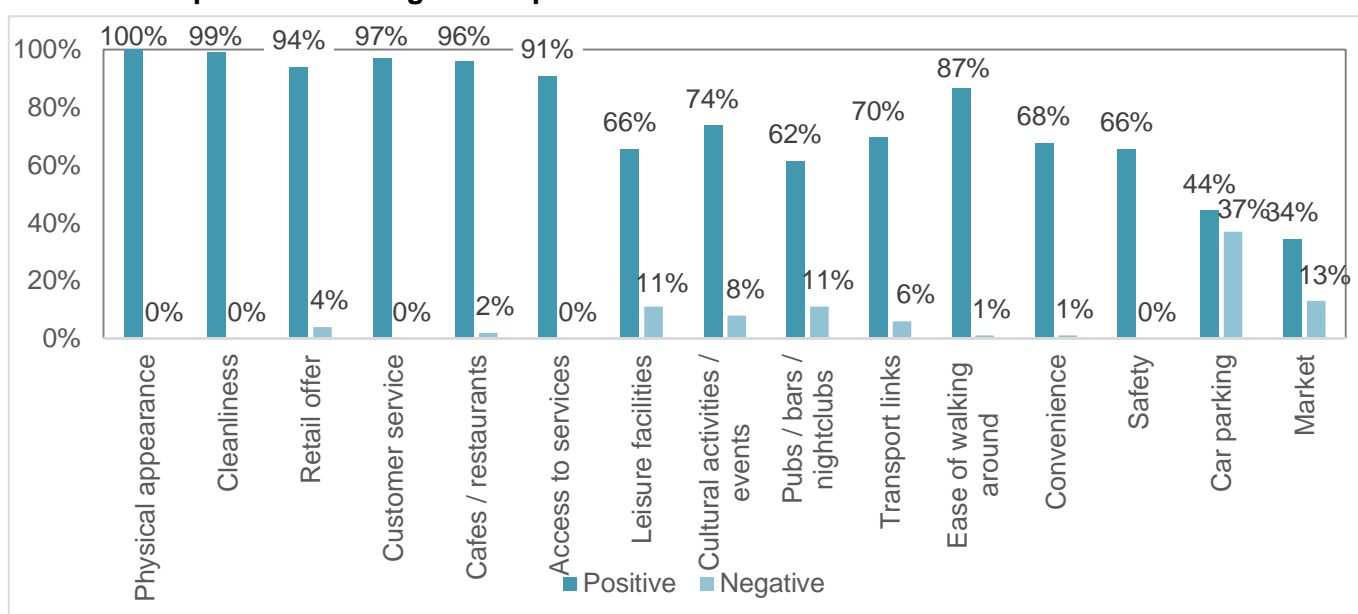
On Foot	8	8%
Bicycle	2	2%
Car	64	65%
Bus	14	14%
Train	2	2%
Coach	9	9%

### On average, on a normal visit to the town centre how much money would you spend?



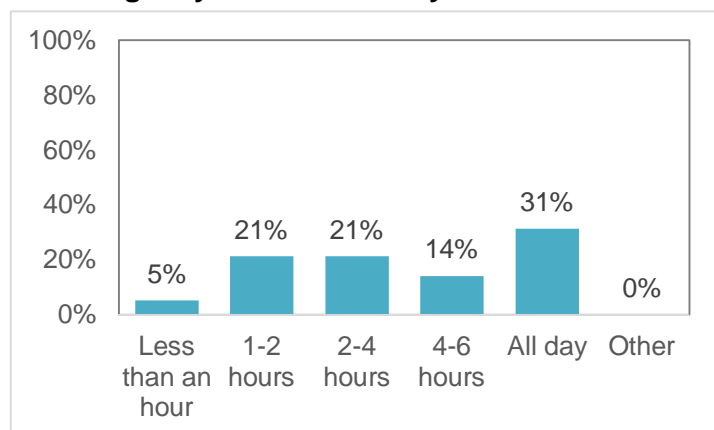
Nothing	0	0%
£0.01-£5	0	0%
£5.01-£10	14	14%
£10.01-£20	17	17%
£20.01-£50	36	36%
£50+	32	32%

### What are the positive and negative aspects of the town centre?



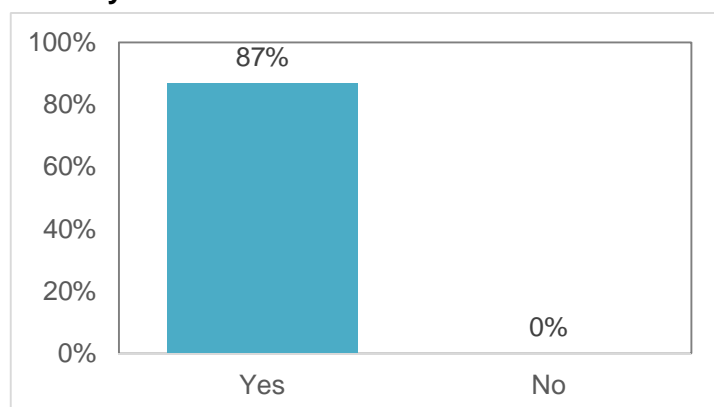
	Positive		Negative	
Physical appearance	99	100%		0%
Cleanliness	98	99%		0%
Retail offer	93	94%	4	4%
Customer service	96	97%		0%
Cafes / restaurants	95	96%	2	2%
Access to services	90	91%		0%
Leisure facilities	65	66%	11	11%
Cultural activities / events	73	74%	8	8%
Pubs / bars / nightclubs	61	62%	11	11%
Transport links	69	70%	6	6%
Ease of walking around	86	87%	1	1%
Convenience	67	68%	1	1%
Safety	65	66%		0%
Car parking	44	44%	37	37%
Market	34	34%	13	13%

### How long do you intend to stay on this visit to the town centre?



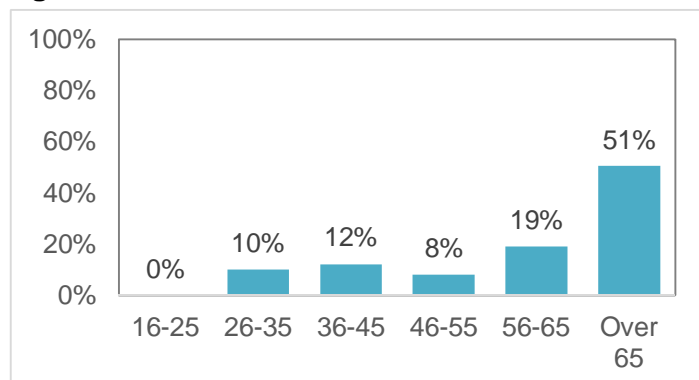
Less than an hour	5	5%
1-2 hours	21	21%
2-4 hours	21	21%
4-6 hours	14	14%
All day	31	31%
Other	0	0%

### Would you recommend a visit to the town centre?



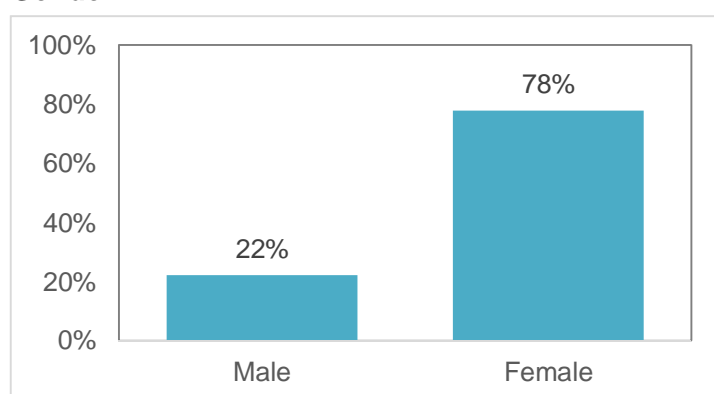
Yes	86	87%
No	0	0%

### Age



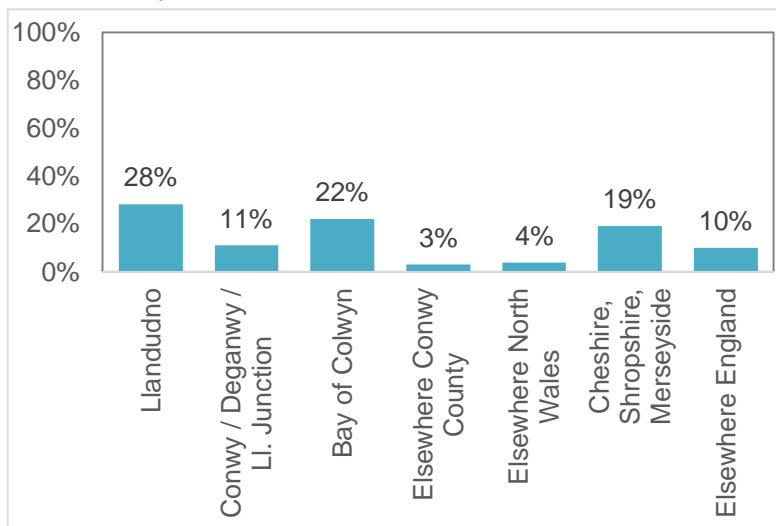
16-25	0	0%
26-35	10	10%
36-45	12	12%
46-55	8	8%
56-65	19	19%
Over 65	50	51%

### Gender



Male	22	22%
Female	77	78%

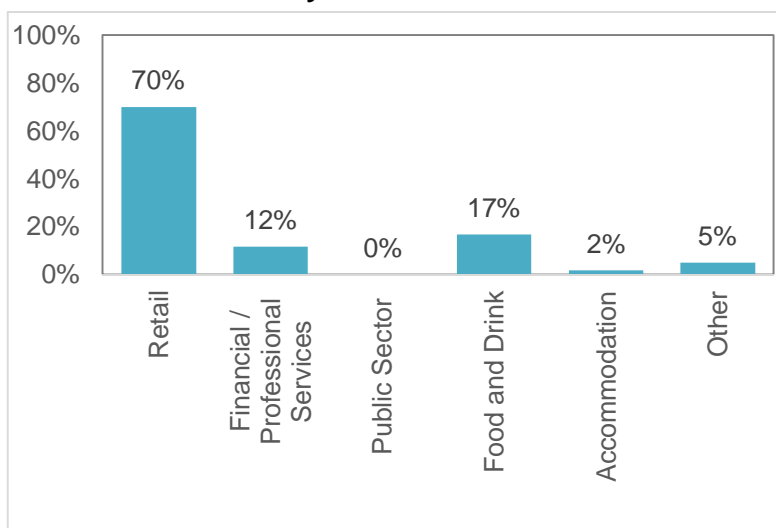
### Where are you from?



Llandudno	28	28%
Conwy / Deganwy / Llandudno Junction	11	11%
Bay of Colwyn	22	22%
Elsewhere Conwy County	3	3%
Elsewhere North Wales	4	4%
Cheshire, Shropshire, Merseyside	19	19%
Elsewhere England	10	10%

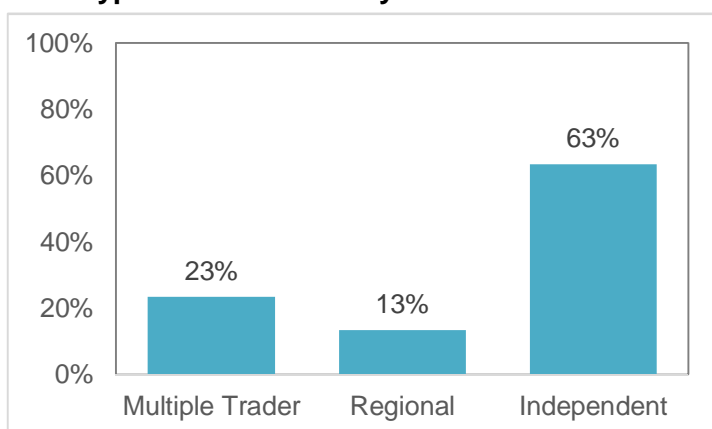
### Business confidence survey results (Llandudno)

#### What is the nature of your business?



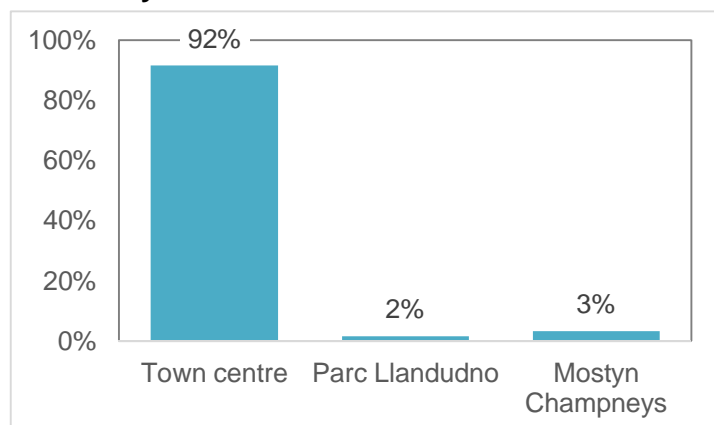
Retail	42	70%
Financial / Professional Services	7	12%
Public Sector	0	0%
Food and Drink	10	17%
Accommodation	1	2%
Other	3	5%

#### What type of business are you?



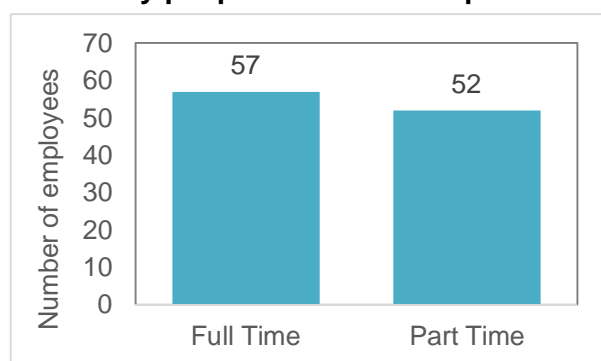
Multiple Trader	14	23%
Regional	8	13%
Independent	38	63%

### Where is your business located?



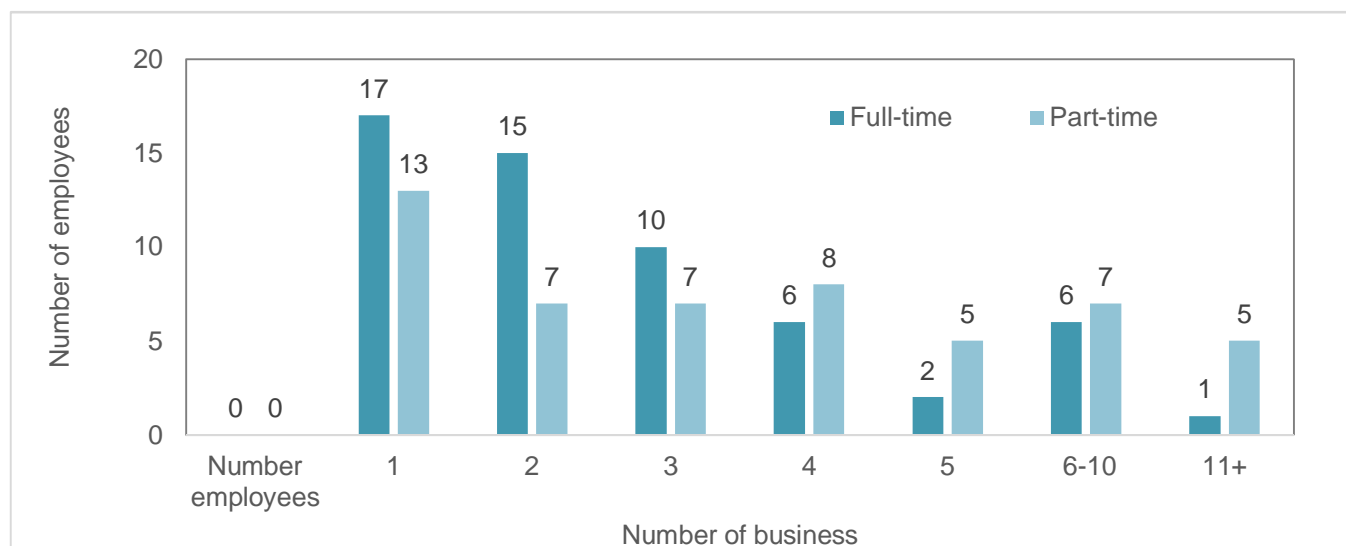
Town centre	55	92%
Parc Llandudno	1	2%
Mostyn Champneys	2	3%

### How many people work at these premises? (includes owners)

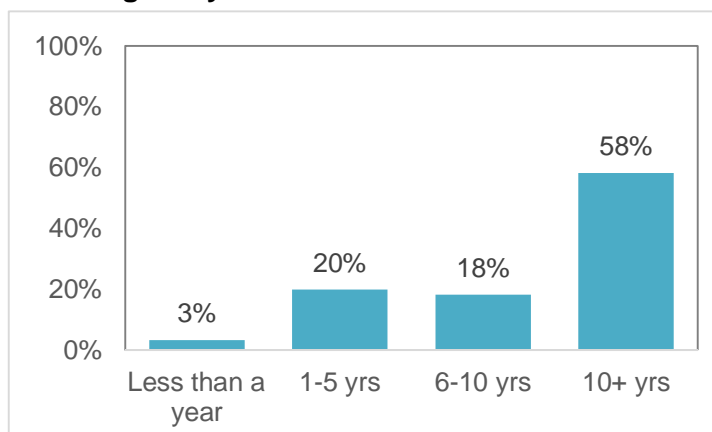


Number of full-time employees	57
Number of part-time employees	52

Number employed	Number of businesses with	
	Full-time employees	Part-time employees
1 employed	17	13
2 employed	15	7
3 employed	10	7
4 employed	6	8
5 employed	2	5
6-10 employed	6	7
11+ employed	1	5

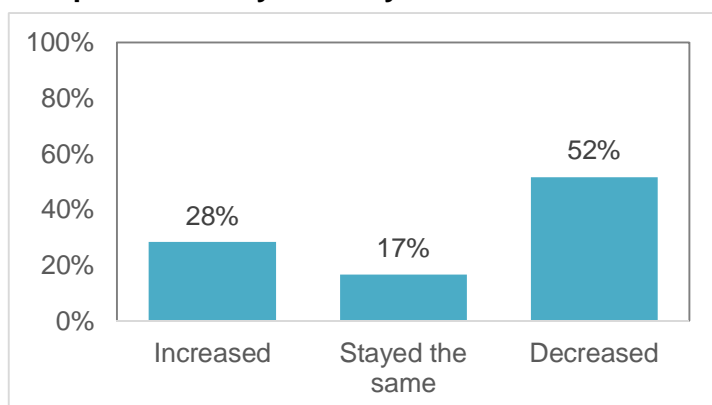


### How long has your business been in the town?



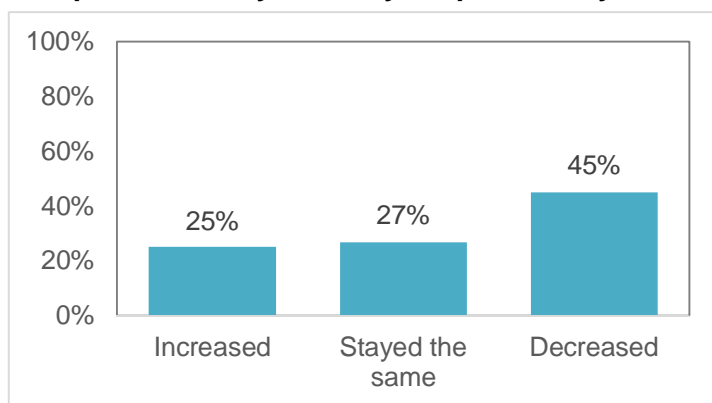
Less than a year	2	3%
1-5 years	12	20%
6-10 years	11	18%
10+ years	35	58%

### Compared to last year has your turnover...?



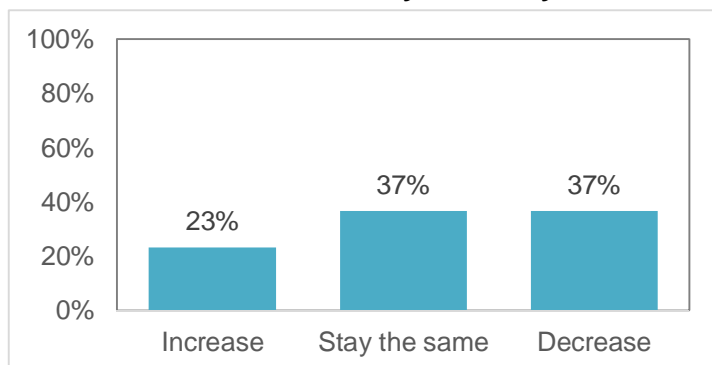
Increased	17	28%
Stayed the same	10	17%
Decreased	31	52%

### Compared to last year has your profitability...?



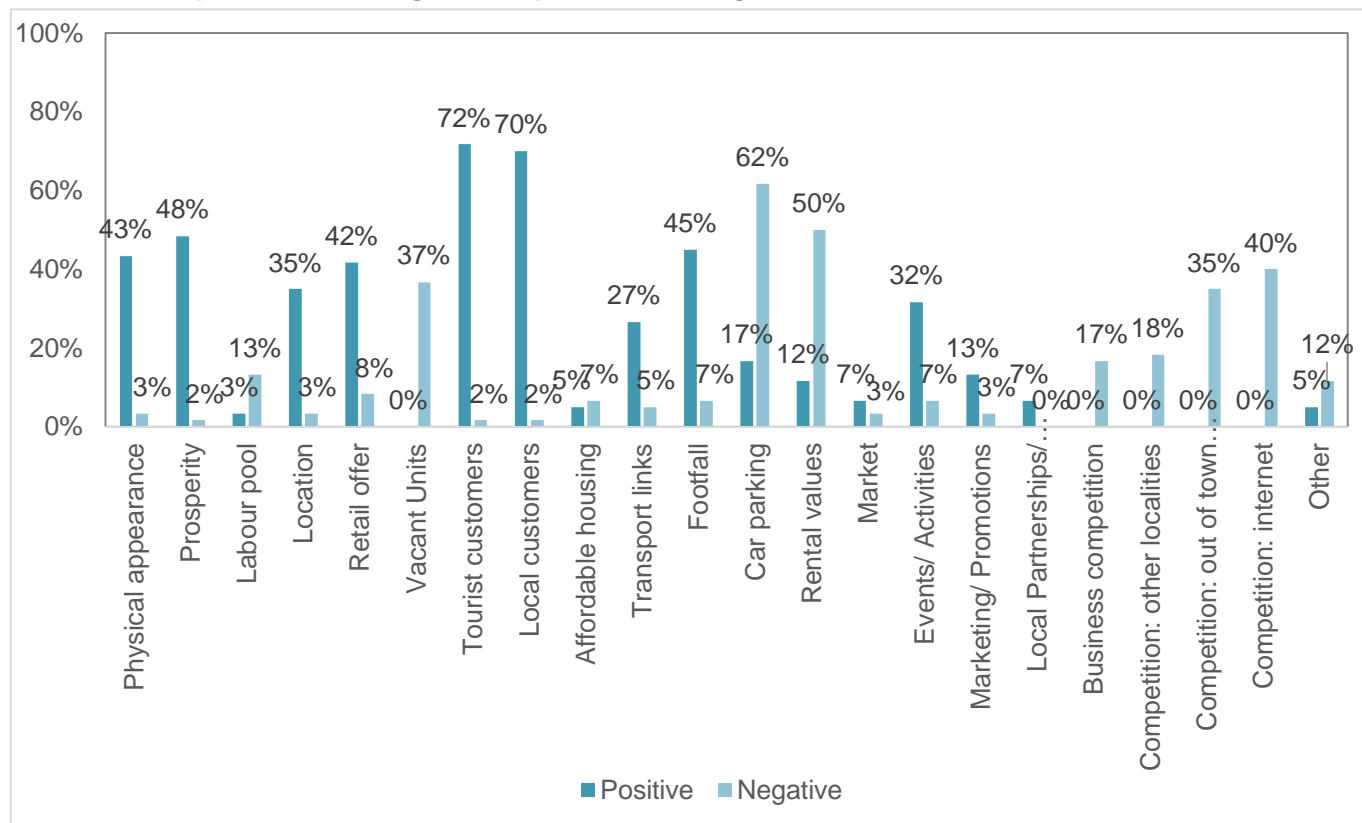
Increased	15	25%
Stayed the same	16	27%
Decreased	27	45%

### Over the next 12 months do you think your turnover will...?



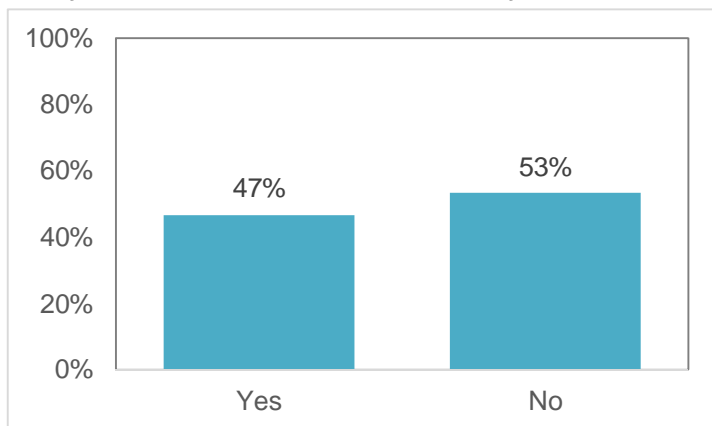
Increase	14	23%
Stay the same	22	37%
Decrease	22	37%

## What are the positive and negative aspects of having a business located in the town?



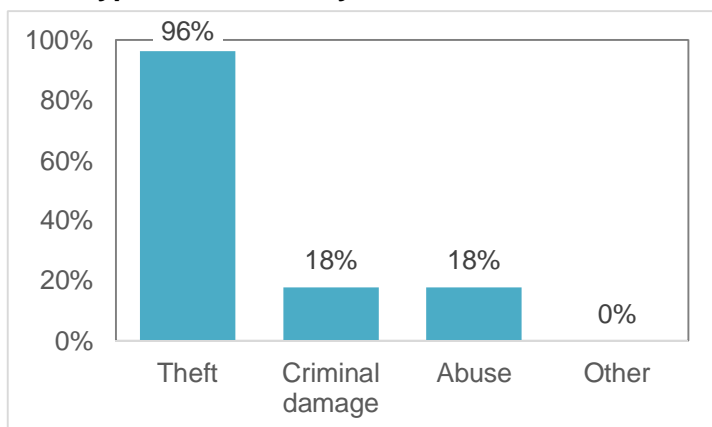
	Positive		Negative	
Physical appearance	26	43%	2	3%
Prosperity	29	48%	1	2%
Labour pool	2	3%	8	13%
Location	21	35%	2	3%
Retail offer	25	42%	5	8%
Vacant units	0	0%	22	37%
Tourist customers	43	72%	1	2%
Local customers	42	70%	1	2%
Affordable housing	3	5%	4	7%
Transport links	16	27%	3	5%
Footfall	27	45%	4	7%
Car parking	10	17%	37	62%
Rental values	7	12%	30	50%
Market	4	7%	2	3%
Events/ Activities	19	32%	4	7%
Marketing/ Promotions	8	13%	2	3%
Local Partnerships/ Organisations	4	7%	0	0%
Business competition	0	0%	10	17%
Competition: other localities	0	0%	11	18%
Competition: out of town shopping	0	0%	21	35%
Competition: internet	0	0%	24	40%
Other	3	5%	7	12%

### Has your business suffered from any crime over the last 12 months?



Yes	28	47%
No	32	53%

### What type of crime has your business suffered over the last 12 months?

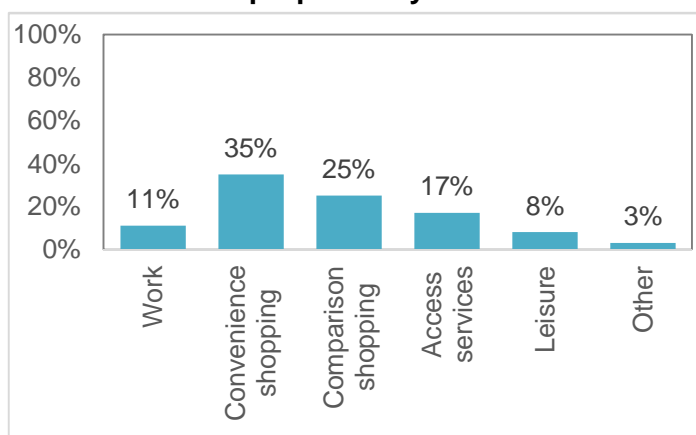


Theft	27	96%
Criminal damage	5	18%
Abuse	5	18%
Other	0	0%

Only includes those who responded yes above. Will add to more than 100%, as some businesses have been victims of more than one type of crime.

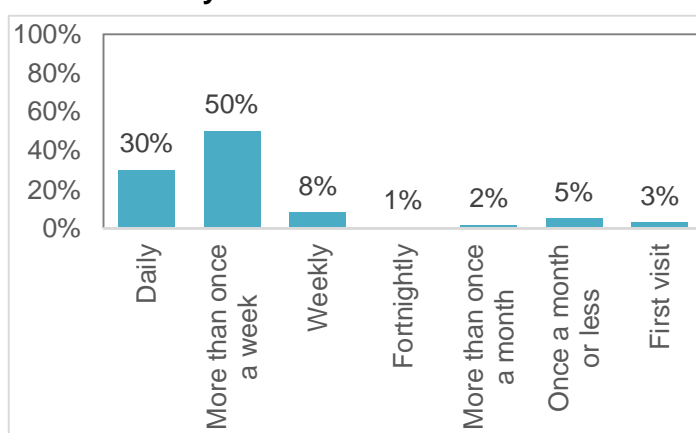
## Town centre users survey results (Colwyn Bay)

### What is the main purpose of your visit to the town centre today?



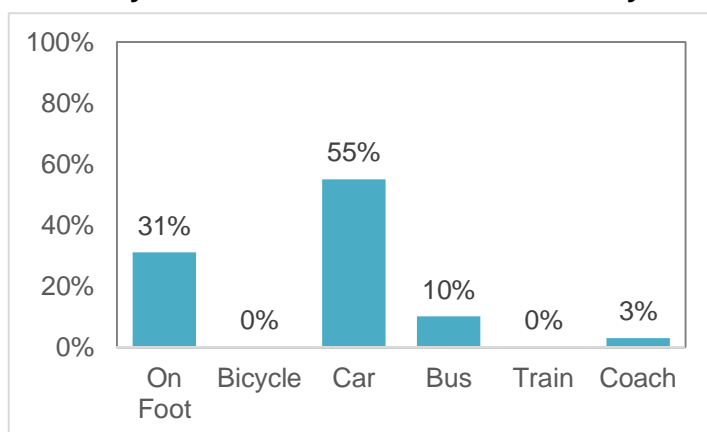
Work	11	11%
Convenience shopping	35	35%
Comparison shopping	25	25%
Access services	17	17%
Leisure	8	8%
Other	3	3%

### How often do you visit the town centre?



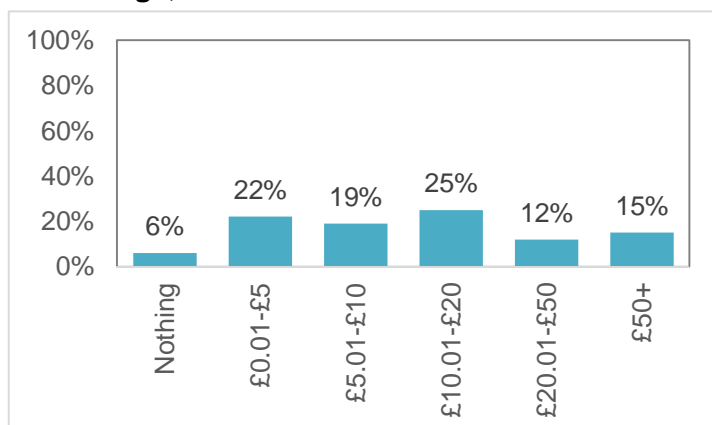
Daily	30	30%
More than once a week	50	50%
Weekly	8	8%
Fortnightly	1	1%
More than once a month	2	2%
Once a month or less	5	5%
First visit	3	3%

### How did you travel into the town centre today?



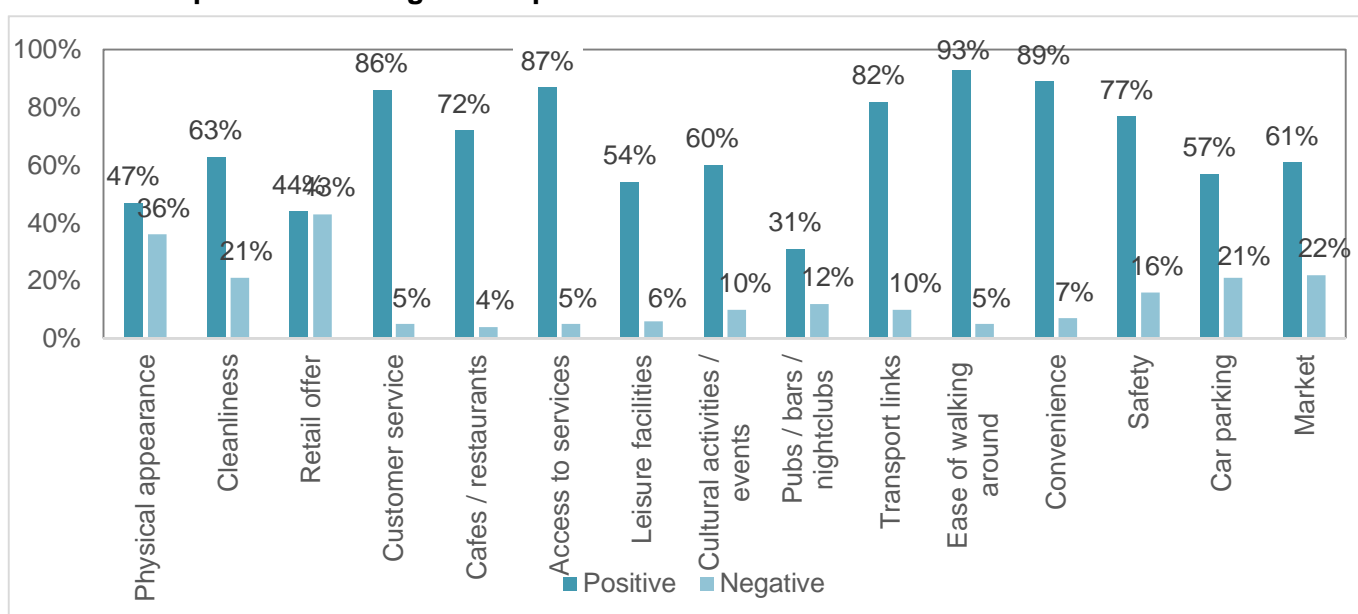
On Foot	31	31%
Bicycle	0	0%
Car	55	55%
Bus	10	10%
Train	0	0%
Coach	3	3%

### On average, on a normal visit to the town centre how much money would you spend?



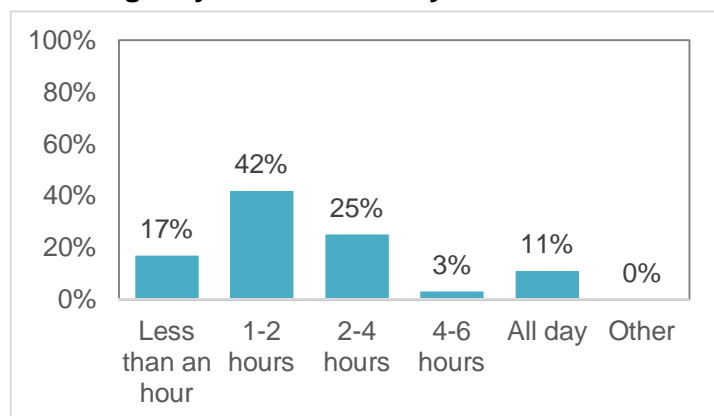
Nothing	6	6%
£0.01-£5	22	22%
£5.01-£10	19	19%
£10.01-£20	25	25%
£20.01-£50	12	12%
£50+	15	15%

### What are the positive and negative aspects of the town centre?



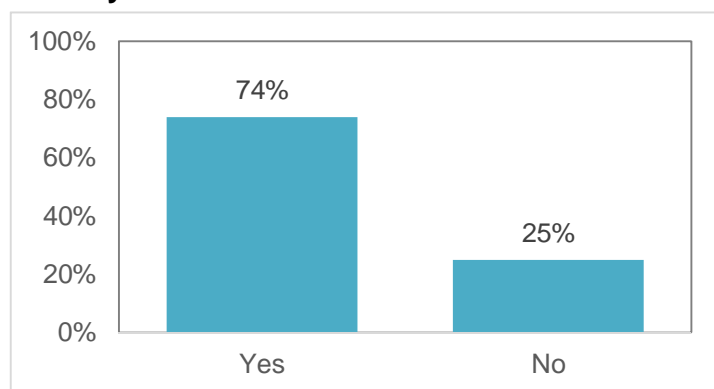
	Positive		Negative	
Physical appearance	47	47%	36	36%
Cleanliness	63	63%	21	21%
Retail offer	44	44%	43	43%
Customer service	86	86%	5	5%
Cafes / restaurants	72	72%	4	4%
Access to services	87	87%	5	5%
Leisure facilities	54	54%	6	6%
Cultural activities / events	60	60%	10	10%
Pubs / bars / nightclubs	31	31%	12	12%
Transport links	82	82%	10	10%
Ease of walking around	93	93%	5	5%
Convenience	89	89%	7	7%
Safety	77	77%	16	16%
Car parking	57	57%	21	21%
Market	61	61%	22	22%

### How long do you intend to stay on this visit to the town centre?



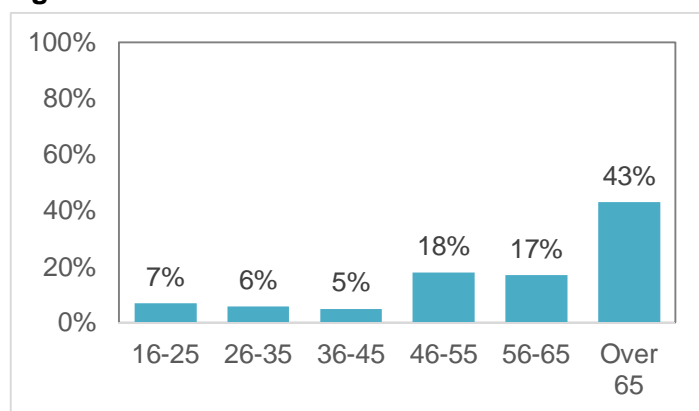
Less than an hour	17	17%
1-2 hours	42	42%
2-4 hours	25	25%
4-6 hours	3	3%
All day	11	11%
Other	0	0%

### Would you recommend a visit to the town centre?



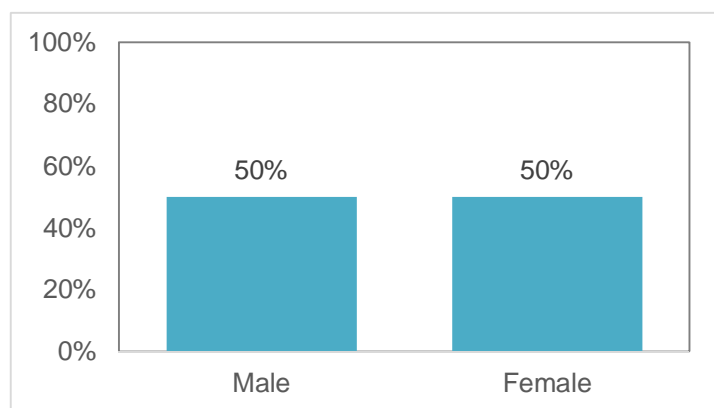
Yes	74	74%
No	25	25%

### Age



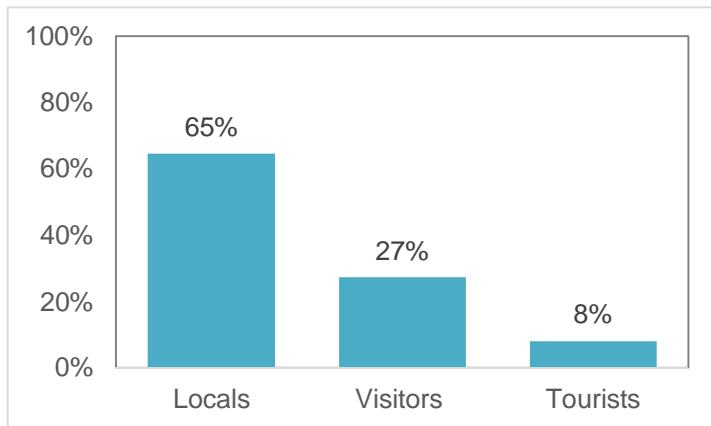
16-25	7	7%
26-35	6	6%
36-45	5	5%
46-55	18	18%
56-65	17	17%
Over 65	43	43%

### Gender



Male	50	50%
Female	50	50%

### Where are you from?



Locals	64	65%
Visitors	27	27%
Tourists	8	8%

#### Definitions:

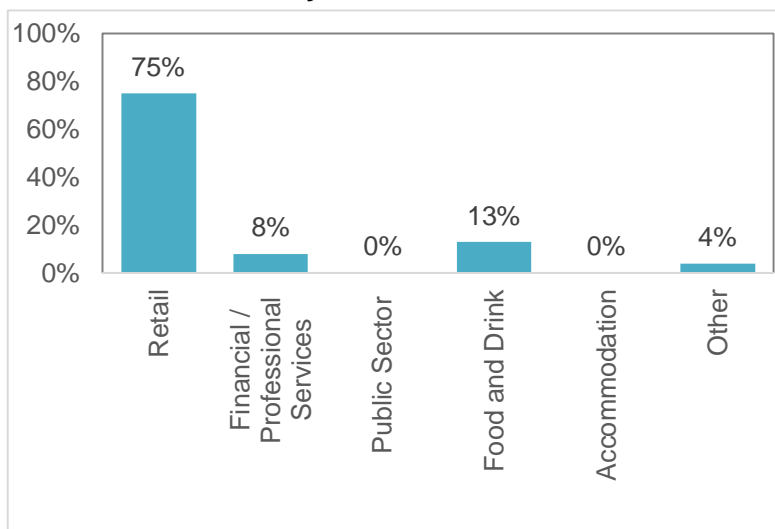
**Locals:** postcode covering the town

**Visitors:** Post code less than 30 mins drive away

**Tourists:** postcode less more than 30 mins drive away

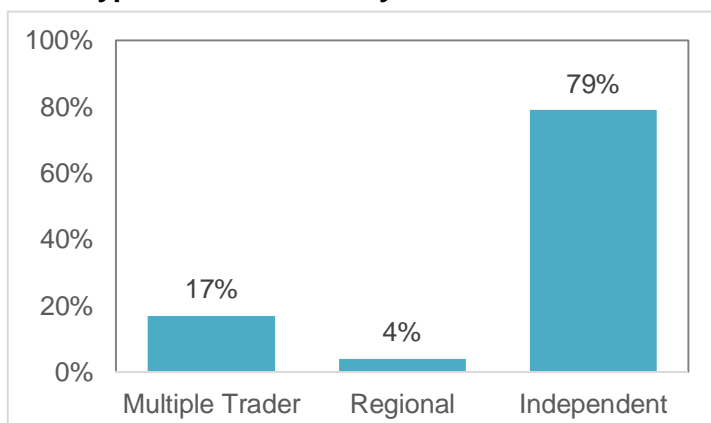
### Town centre business confidence survey (Colwyn Bay)

#### What is the nature of your business?



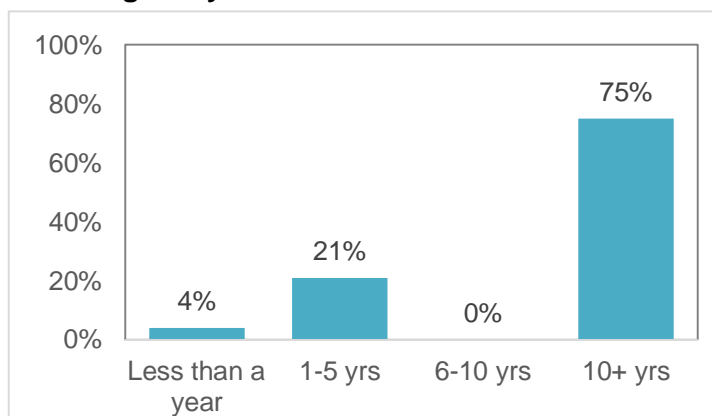
Retail	18	75%
Financial / Professional Services	2	8%
Public Sector	0	0%
Food and Drink	3	13%
Accommodation	0	0%
Other	1	4%

#### What type of business are you?



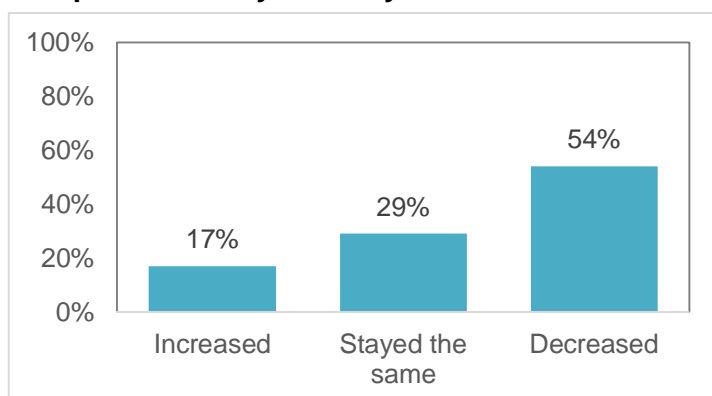
Multiple Trader	4	17%
Regional	1	4%
Independent	19	79%

### How long has your business been in the town?



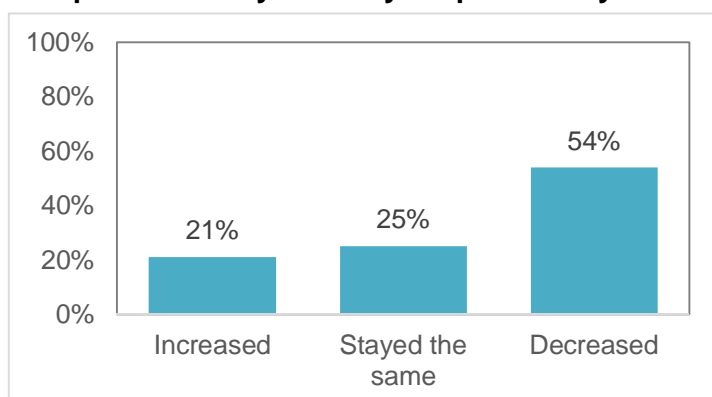
Less than a year	1	4%
1-5 years	5	21%
6-10 years	0	0%
10+ years	18	75%

### Compared to last year has your turnover...?



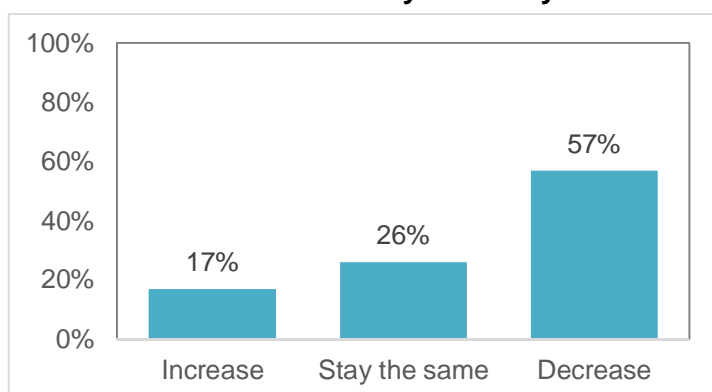
Increased	4	17%
Stayed the same	7	29%
Decreased	13	54%

### Compared to last year has your profitability...?



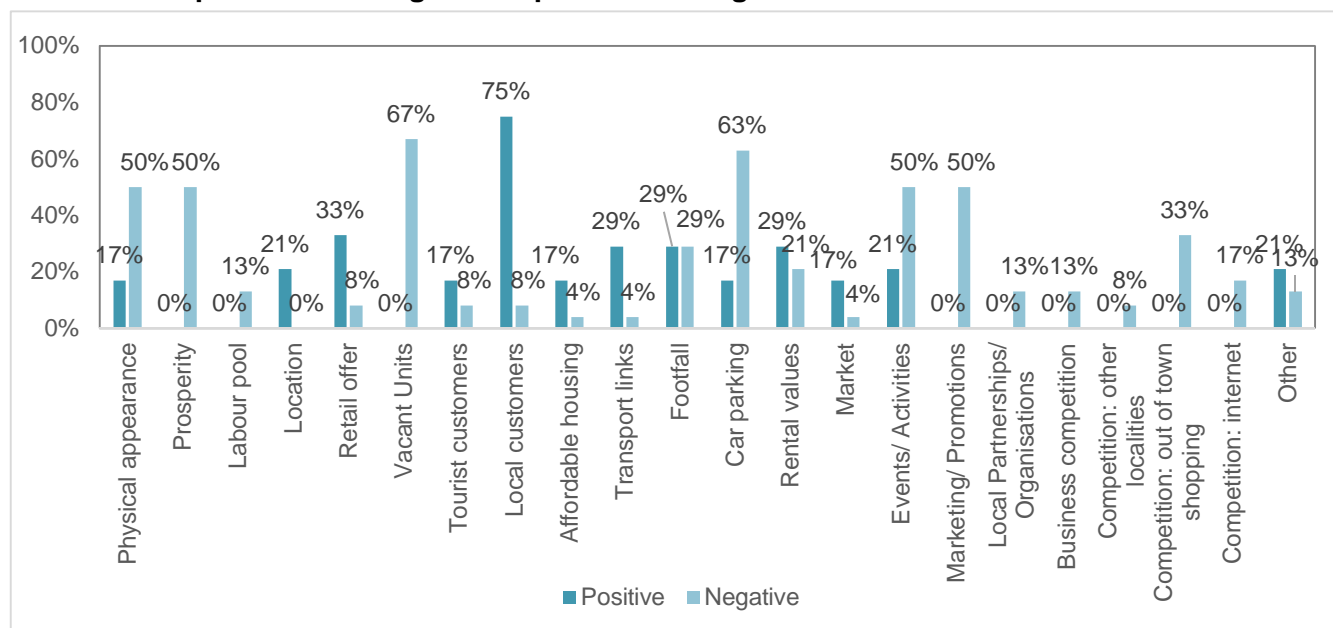
Increased	5	21%
Stayed the same	6	25%
Decreased	13	54%

### Over the next 12 months do you think your turnover will...?



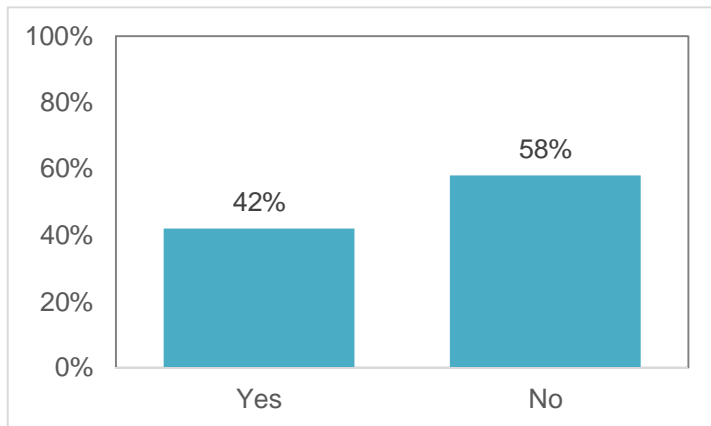
Increase	4	17%
Stay the same	6	26%
Decrease	13	57%

## What are the positive and negative aspects of having a business located in the town?



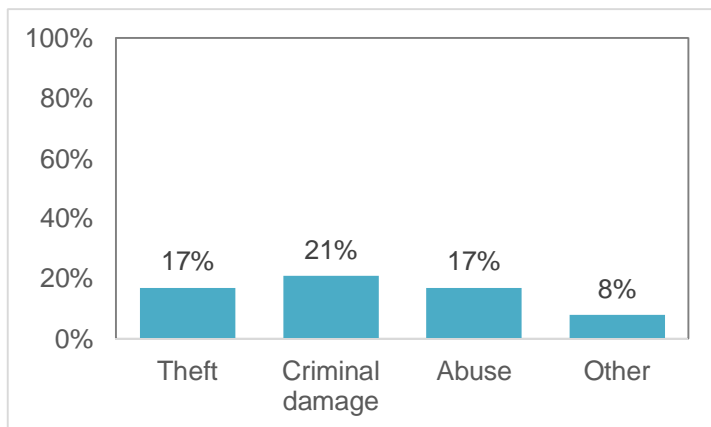
	Positive	Negative
Physical appearance	17%	50%
Prosperity	0%	50%
Labour pool	0%	13%
Location	21%	0%
Retail offer	33%	8%
Vacant units	0%	67%
Tourist customers	17%	8%
Local customers	75%	8%
Affordable housing	17%	4%
Transport links	29%	4%
Footfall	29%	29%
Car parking	17%	63%
Rental values	29%	21%
Market	17%	4%
Events/ Activities	21%	50%
Marketing/ Promotions	0%	50%
Local Partnerships/ Organisations	0%	13%
Business competition	0%	13%
Competition: other localities	0%	8%
Competition: out of town shopping	0%	33%
Competition: internet	0%	17%
Other	21%	13%

### Has your business suffered from any crime over the last 12 months?



Yes	42	42%
No	58	58%

### What type of crime has your business suffered over the last 12 months?



Theft	17%
Criminal damage	21%
Abuse	17%
Other	8%