Conwy Deposit Local Development Plan 2007 – 2022 (Revised edition 2011)

REVISED BACKGROUND PAPER 15 – SUBMISSION

Retail Study

August 2012

CONWY
CYNGOR BWRDEISTREF SIROL
COUNTY BOROUGH COUNCIL

This document is available to view and download on the Council's web-site at: www.conwy.gov.uk/ldp . Copies are also available to view at main libraries and Council offices and can be obtained from the Planning Policy Service, 26 Castle Street, Conwy LL32 8AY or by telephoning (01492) 575461. If you would like to talk to a planning officer working on the Local Development Plan about any aspect of this document please contact the Planning Policy Service on (01492) 575181 / 575124 / 575445 / 575447.

If you would like an extract or summary of this document on cassette, in large type, in Braille or any other format, please call the Planning Policy Service on (01492) 575461.

CONTENTS

1. INTRODUCTION

1.1 In February 2007 retail consultants, Scott Wilson, completed a retail capacity and needs assessment of the County Borough's town centres. The seven centres identified for the study were Llandudno, Colwyn Bay, Conwy, Abergele, Llanrwst, Llandudno Junction and Kinmel Bay.

1.2 The study identifies opportunities and constraints affecting each settlement and provides an assessment of how best to accommodate future requirements for retail floor-space. The main findings and conclusions of the study are included in this background paper, summarised at Appendix 1.

1.3 The Retail Study also identifies a number of recommended actions for the Council to undertake concerning planning policy, highways, conservation, regeneration and housing issues. These are listed at Appendix 2.

2. METHODOLOGY

2.1 Information from a variety of sources was utilised by Scott Wilson to produce the Retail Study. Sources included the following:

- National and Local Planning Guidance
- Town Centre Health Checks
- Household Surveys
- Analysis of population and expenditure

2.2 In terms of assessing future floor space requirements, an assessment of comparison and convenience floor-space requirements for each named centre has been undertaken for 2003, 2005, 2010, 2015 and 2020.

2.3 Standard optimal trading densities for comparison and convenience stores in the centres have been listed in the Mintel Retail Report (2005). The figures derived using theses averages have been termed the 'Target' figure, which is considered to be typical for centres of these sizes that are 'healthy' and are shown in the tables titled Scenario 2.

2.4 Recommendations are made as to which is the most favourable scenario to apply and, therefore, whether there is any need to allocate sites within the Local Development Plan.

2.5 A more detailed account of the methodology is included within the Retail Study.

3. ANALYSIS BY CENTRE

3.1 Llandudno

General

3.1.1 Llandudno is classified as a Sub-Regional Centre and is the largest shopping location within Conwy County Borough. The centre contains the Mostyn Champney retail warehouse park, which is located immediately to the east of the town centre.

3.1.2 The trade mix in Llandudno varies to that of the Great Britain average. Convenience units are relatively similar to the British average, whilst comparison units are well above the British average, particularly with regards to the number of units. This is indicative of Llandudno's role as a Sub-Regional Centre, which sells a range of comparison goods to a wide catchment population.

3.1.3 The service sector is well represented in the town centre with 21.55% of gross floorspace attributed to it. This is similar to the British average of 20.97%. In our view there are adequate levels of banks, estate agents, restaurants, pubs and other basic service infrastructure in Llandudno.

3.1.4 Llandudno is well below the GB average for vacancy rates suggesting that it is a healthy town centre with high investor confidence.

3.1.5 Llandudno has 114 GOAD defined multiple retailers in the town centre. This represents the relative strength of Llandudno in relation to other centres in the County Borough who struggle to attract multiple retailers.

3.1.6 The town centre has a large and diverse range of independent retailers that help to establish the character of the town centre. These retailers operate alongside recognised multiple retailers to create a vital and viable town centre.

3.1.7 Yields in Llandudno have decreased slightly during the 11 year period (1994 - 2005) from a high of 7.5 down to 7. This shows that investor confidence has remained consistently at a relatively high level.

3.1.8 In terms of accessibility, a number of buses stop in Llandudno town centre and run to various locations in Llandudno. Also, a train station is located on Augusta Street, approximately half a mile to the south of the town centre, which provides services to various locations in Great Britain.

3.1.9 Access by foot to the town centre is currently adequate. The Mostyn Champney retail park is located adjacent to the town centre as it is defined on the Proposal Map in the Llandudno/Conwy District Plan. Facilities and routes for cyclists are somewhat lacking in Llandudno.

3.1.10 Access to the town centre by car is well provisioned. The A470 provides easy access to Llandudno town centre from the A55. Also, the town centre provides on-street car parks and these appear to be well used. In addition, there are 366 spaces provided at the Victoria Centre on Mostyn Street.

3.1.11 The environment in the town centre is attractive as Llandudno has a diverse range of Victorian architecture, which is of a relatively high standard.

3.1.12 Overall, Llandudno is a vital and viable town centre providing an excellent retail choice for its immediate catchment area.

Assessment of Floorspace Requirements – Convenience Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	Expenditure attributed to Llandudno	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	46,227,752	5,628	8,214	0
2005	46,698,366	5,628	8,298	84
2010	48,102,174	5,628	8,547	333
2015	49,713,858	5,628	8,833	619
2020	51,486,309	5,628	9,148	934

3.1.13 Scenario 1, for future convenience floorspace requirements, shows that if Llandudno continues trading at the current density of £5,628 per sq m, by 2010 333 sq m net of additional convenience floorspace is required. By 2015 the amount of additional convenience floorspace required will increase to 619 sq m net, and then to 934 sq m net by 2020.

Scenario 2 – Based on Optimal Trading Density

Scenario 2	Expenditure attributed to Llandudno	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	46,227,752	7,500	6,164	0
2005	46,698,366	7,500	6,226	0
2010	48,102,174	7,500	6,414	0
2015	49,713,858	7,500	6,629	0
2020	51,486,309	7,500	6,865	0

3.1.14 Scenario 2 for convenience goods shows that using the Target trading density of £7,500 per sq m, there is no requirement for additional convenience floorspace during the Plan period (up to 2020).

3.1.15 The current level of trading in Llandudno (Scenario 1) has not had any detrimental effects on the vitality and viability of Llandudno and indeed has added towards the vibrancy of the centre.

3.1.16 Therefore, we recommend Scenario 1 as the Local Planning Authority should not seek to specifically alleviate this issue. When taking into account the existing floorspace commitment, being 1,900 sq m net, it can be seen that no additional convenience floorspace will be required during the plan period (up to 2020), however, it is noted that this floorspace includes a potential market, which will have an element of comparison goods floorspace.

Assessment of Floorspace Requirements – Comparison Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	Expenditure attributed to Llandudno	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	161,101,734	4,811	33,485	0
2005	171,924,322	4,811	35,734	2,249
2010	202,097,826	4,811	42,006	8,521
2015	235,237,207	4,811	48,894	15,409
2020	267,656,500	4,811	55,632	22,147

3.1.17 Scenario 1 for future comparison floorspace requirements in Llandudno shows the level that Llandudno is currently trading at (£4,811 per sq m). A large amount of comparison expenditure was attributed to Llandudno Junction, which is surprising considering the small number of comparison units in Llandudno Junction. It appears that in answering the survey questions some people may have incorrectly assumed that Llandudno Junction was actually the Mostyn Champney retail park.

3.1.18 In order to correct this perceived assumption we have added the total amount of comparison floor area and expenditure to the figures for Llandudno. As such, Scenario 1 demonstrates that by 2010 an additional 8,521 sq m net of comparison floorspace will be required in Llandudno. By 2015 this figure will rise to 15,409 sq m net and by 2020 it will rise to 22,147 sq m net.

3.1.19 Taking into account the existing comparison floorspace commitment (being 9,034 sq m net), no additional comparison floorspace will be required in Llandudno until 2015, being 6,375 sq m. This rises to a need for 13,113 sq m net by 2020.

Scenario 2 – Based on Optimal Trading Density

Scenario 2	Expenditure attributed to Llandudno	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	161,101,734	4,500	35,800	2,315
2005	171,924,322	4,500	38,205	4,720
2010	202,097,826	4,500	44,911	11,426
2015	235,237,207	4,500	52,275	18,790
2020	267,656,500	4,500	59,479	25,994

3.1.20 Scenario 2 demonstrates that using the Target trading density of £4,500 per sq m, by 2010 an additional 11,426 sq m net of comparison floorspace will be required in Llandudno. By 2015 this figure will rise to 18,790 sq m net and by 2020 it will rise to 25,994 sq m net

3.1.21 It can be seen that Llandudno is slightly overtrading in relation to the Target figure. It is considered that Llandudno should continue to trade at the current level, therefore, Scenario 1 should be implemented as the current trading density is not harming the centre and it is a vital and vibrant centre.

3.2 Colwyn Bay

General

3.2.1 Colwyn Bay is the second largest shopping location within Conwy County Borough after Llandudno. It contains the three shopping areas of Colwyn Bay, Old Colwyn and Rhos on Sea, however, the health check focuses on the main Colwyn Bay town centre. Colwyn Bay town centre is relatively large and includes an 'open-air' shopping area on Station Road and the Bay View shopping centre.

3.2.2 In terms of the number of units and floorspace for food/convenience, Colwyn Bay is very similar to the GB average on both counts. For comparison goods, as with the Sub-Regional Centre of Llandudno, Colwyn Bay displays an above average level of floorspace compared to the GB average, however, it has a lesser area of gross floorspace. The gross percentage floorspace in Colwyn Bay is also less than that in Llandudno. This is due to Llandudno's dominance over Colwyn Bay as a Sub-Regional Centre.

3.2.3 Colwyn Bay displays a lower than average level of service floorspace within a lesser number of units than the GB average. In terms of vacancies, Colwyn Bay has a relatively high level, being 15.94% compared with the GB average of 10.92%. Colwyn Bay town centre has 65 GOAD defined multiple retailers in the town centre. This is the second highest amount after Llandudno and represents the strength of Colwyn Bay in relation to the smaller centres in Conwy County Borough who struggle to attract multiple retailers. The open-air shopping area contains a limited number of multiple retailers as the majority of multiple retailers are located in the Bay View shopping centre.

3.2.4 Colwyn Bay has a large and diverse range of independent retailers that help to establish the character of the town centre and create a varied shopping provision. However, it is noted that there is a high proportion of discount operators/charity shops present in the town centre. This is representative of the low vitality and viability of the town centre outside of the Bay View shopping centre.

3.2.5 Yields in Colwyn Bay have increased from 8 to 8.5 during an 11 year period (1994 - 2005). The highest yield during this time (10) was in 2001. Colwyn Bay has a higher yield than Llandudno, which demonstrates the long-term confidence that investors have in Llandudno relative to Colwyn Bay. Also, it is noted that Colwyn Bay has the highest yields out of all the centres assessed, which includes Llandudno, Bangor and Rhyl.

3.2.6 In terms of public transport, there is a range of bus services in Colwyn Bay that link the town centre to the surrounding area, as well as other centres in Great Britain. The train station in the primary shopping area allows the town centre to be easily reached by train and also links the centre to other centres outside Colwyn Bay and Wales.

3.2.7 Access by foot to the town centre is reasonably adequate. However, facilities and routes for cyclists are somewhat lacking in Colwyn Bay.

3.2.8 The A547 and the A55 run through Colwyn Bay town centre, as such this centre is dominated by the traffic environment, in particular on Conway Road and Abergele Road. Also, due to the large number of on-street parking spaces in the town centre and the congestion caused by these, it is considered that the town centre would benefit from increased pedestrianisation. There is also a requirement for off-street parking.

3.2.9 Colwyn Bay town centre is an attractive environment. As a result of the settlement's historic importance, the town centre has been designated as a Conservation Area. In recent years, Grant Schemes have been used to enhance the retail area, which had been declining due to lack of investment and changing shopping conditions.

3.2.10 Overall, it is considered that Colwyn Bay has a reasonably vital and viable town centre, however, this is compromised by the high number of vacant units due to their impact on the amenity of the town centre, under-trading of comparison stores, and congestion in the town centre. In any event, Colwyn Bay does provide an excellent retail choice for its immediate catchment area.

Assessment of Floorspace Requirements – Convenience Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	Expenditure attributed to Colwyn Bay	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	25,149,553	4,077	6,168	0
2005	25,405,584	4,077	6,231	63
2010	26,169,306	4,077	6,418	250
2015	27,046,120	4,077	6,633	465
2020	28,010,396	4,077	6,870	702

3.2.11 Scenario 1 demonstrates the convenience floorspace requirements if Colwyn Bay town centre continues trading at the current density of £4,077 per sq m. It shows that by 2010, 250 sq m net of additional convenience floorspace is required. By 2015 this will increase to 465 sq m net and then to 702 sq m net by 2020.

Scenario 2 – Based on Optimal Trading Density

Scenario 2	Expenditure attributed to Colwyn Bay	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	25,149,553	5,000	5,030	0
2005	25,405,584	5,000	5,081	0
2010	26,169,306	5,000	5,234	0
2015	27,046,120	5,000	5,409	0
2020	28,010,396	5,000	5,602	0

3.2.12 Scenario 2 shows that using the Target trading density of £5,000 per sq m, there is no requirement for additional convenience floorspace during the Plan period (up to 2020).

3.2.13 Overall, whilst it is evident that convenience stores are under-trading relative to the 'Target' trading density (Scenario 2), this has not necessarily had a negative impact on the vitality and viability of the town centre. In planning for future growth, the Local Planning Authority should not specifically constrain convenience floorspace to alleviate this under-trading. Scott Wilson recommends that the Planning Authority should implement Scenario 2 and not allocate retail sites within the LDP, as there is no identified quantitative need up to 2020. Instead, the Planning Authority should consider the planning merits of individual convenience retail proposals as and when schemes come forward. These schemes should be considered in the context of the fact that Colwyn Bay is under-trading.

Assessment of Floorspace Requirements – Comparison Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	**Expenditure attributed to Colwyn Bay**	**Actual £ per sq m**	**Floor space requirement (sq m net)**	**Additional floorspace requirement (sq m net)**
2003	24,970,898	1,367	18,266	0
2005	26,648,408	1,367	19,493	1,227
2010	31,325,325	1,367	22,914	4,648
2015	36,461,956	1,367	26,672	8,406
2020	41,486,927	1,367	30,347	12,081

3.2.14 Scenario 1 demonstrates the future comparison floorspace requirements for Colwyn Bay if this centre continues trading at the current level of £1,367 per sq m. It shows that by 2010 an additional 4,648 sq m net of comparison floorspace will be required in Colwyn Bay. By 2015 this figure will rise to 8,406 sq m net and by 2020 it will rise to 12,081 sq m net.

3.2.15 Scenario 2 shows that using the Target trading density of £2,500 per sq m, no additional comparison floorspace will be required in Colwyn Bay during the Plan period (up to 2020).

Scenario 2 – Based on Optimal Trading Density

Scenario 2	**Expenditure attributed to Colwyn Bay**	**Actual £ per sq m**	**Floor space requirement (sq m net)**	**Additional floorspace requirement (sq m net)**
2003	24,970,898	2,500	9,988	0
2005	26,648,408	2,500	10,659	0
2010	31,325,325	2,500	12,530	0
2015	36,461,956	2,500	14,585	0
2020	41,486,927	2,500	16,595	0

3.2.16 We recommend that floorspace should be constrained until at least 2020 in order to increase the expenditure attributed to the existing stores thus increasing the vitality and viability of Colwyn Bay. Scenario 2 should be implemented, as the trading density should be increased to the 'Target' rate in order to increase the vitality of the centre and ensure the viability of existing businesses.

3.3 Conwy

General

3.3.1 Conwy is a historic town and is designated as a World Heritage Site by UNESCO. The town centre is located in a Conservation Area and the walls around the town, as well as the Castle, are designated as ancient monuments. There is also a large number of Grade I and II listed buildings in the town centre. The retail offer of the town centre is constrained by the town's historic nature and geographic factors.

3.3.2 In terms of the percentage number of units associated with the sale of food/convenience goods, Conwy is below the GB average, being 7.61% compared with 9.38%. Also, the gross floorspace attributed to food/convenience is approximately half the GB average, being 7.02% compared with 14.98%. This shows that there is not a strong representation of food/convenience units in Conwy town centre. This shortage of provision is analysed later in this report.

3.3.3 Conwy may be below the GB average for the sale of food/convenience goods due to the close proximity of this centre to Llandudno Junction, which offers an increased range and choice of convenience retailing.

3.3.4 Conwy town centre contains a lower than average number of comparison units and level of floorspace compared to the GB average. Also, it is noted that Conwy is the only main centre to display these trends in the study area.

3.3.5 Conwy town centre has slightly lower than average level of service floorspace, however, this is within a larger area of floorspace compared to the GB average. This indicates that Conwy is slightly lacking in the service sector as more service units would be expected due to the amount of tourism that Conwy attracts.

3.3.6 The vacancy level is approximately double the GB average, with 20.65% of units vacant compared to a UK average of 10.87%. This equates to 19 vacant units being located in the town centre. This may be due to the historic buildings/floorspace being unsuitable for the needs of modern operators.

3.3.7 The 2005 GOAD data shows that Conwy has 13 GOAD defined multiple retailers in the town centre. Due to the physical constraints in the town centre - i.e. topography and location; and because the town walls restrain the town centre, it is considered that the centre has constrained growth potential and a limited capacity to accommodate multiple retailers.

3.3.8 In comparison to this, there are a large number of independent retailers located in the town centre. It is these retailers that help to create and maintain the local character of the town centre. Also, it is noted that there is a relatively large range of tourism shops located in the town centre, which reflects its role as a tourist destination.

3.3.9 In terms of public transport, a number of buses stop in Conwy town centre and provide services to locations in Conwy and to other centres in Wales. A railway station is located within the Castle walls in the town centre. The station is located on the Crewe to Holyhead North Wales Coast Line and services are provided from Conwy to Holyhead, Bangor, Colwyn Bay, Rhyl, Chester, Crewe and London Euston.

3.3.10 However, the station does not offer as many train services as Llandudno or Colwyn Bay and no direct services to some places such as London Euston or Crewe are available.

3.3.11 Overall, Conwy town centre is reasonably well connected both with the immediate surrounding area and other centres in the UK.

3.3.12 Access by foot to the town centre is currently adequate, however, there is limited pedestrianisation in the town centre. Bicycle route provision and facilities are also lacking in Conwy.

3.3.13 Access by road to Conwy is on the A55 and B5106. The town centre itself is rather difficult to access due to the layout and circulation of the road network. This results in some parts of the town centre being congested, in particular Berry Street, Castle Street and Bangor Road.

3.3.14 There are a large number of off-street parking spaces in Conwy. On street parking spaces are also available in the town centre. Overall, it is considered that the number of parking spaces in the town centre is adequate.

3.3.15 Conwy town centre is an attractive environment and an attractive historic town. It contains ancient monuments and a large number of Grade I and II listed buildings. The environmental quality of the centre is relatively good, however, this is undermined by traffic passing through the centre.

3.3.16 The role and function of Conwy is as a tourism centre rather than a retail centre. Conwy is part of a network of centres and should not necessarily fulfil all local retail needs as it is supported by other centres. As such, Conwy should serve most local needs and cater for tourism.

3.3.17 Overall, it is considered that Conwy is a relatively vital and viable centre.

Assessment of Floorspace requirements – Convenience Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	Expenditure attributed to Conwy	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	4,857,571	8,477	573	0
2005	4,907,023	8,477	579	6
2010	5,054,534	8,477	596	23
2015	5,223,888	8,477	616	43
2020	5,410,135	8,477	638	65

3.3.18 Scenario 1 shows convenience floorspace requirements if Conwy town centre continues overtrading at its current trading density of £8,477 per sq m. It shows that by 2010, only 23 sq m net of additional convenience floorspace is required, increasing to 43 sq m net by 2015 and then to 65 sq m net by 2020.

Scenario 2 - Based on Optimal Trading Density

Scenario 2	Expenditure attributed to Conwy	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	4,857,571	5,000	972	399
2005	4,907,023	5,000	981	408
2010	5,054,534	5,000	1,011	438
2015	5,223,888	5,000	1,045	472
2020	5,410,135	5,000	1,082	509

3.3.19 Scenario 2 for future convenience floorspace shows that using the Target trading density of £5,000 per sq m, by 2010 438 sq m net of additional convenience floorspace is required, increasing to 472 sq m net by 2015 and then to 509 sq m net by 2020.

3.3.20 Overall, it is evident that convenience stores are significantly overtrading relative to the 'Target' trading density (Scenario 2). The overtrading in Conwy may be detrimental 3.3.21 to residents choice and quality of retail experience. There would be a qualitative benefit in the development of a retail facility that provides top up shopping facilities for residents on a day to day basis which would be supported by existing large format retail provision within Llandudno Junction. This would help to reduce the need to travel for shoppers on a day to day basis, whilst improving accessibility to a wider range of convenience goods for residents with limited mobility.

3.3.21 However, it is recognised that there are no appropriate sites within the town centre and given the context of Conwy, any new retail floorspace should be developed within the town centre. Given the historic characteristics of Conwy, the retention of the historic environment should take precedence over fulfilling the identified convenience need.

3.3.22 Therefore, any new convenience floorspace would require the conversion of existing floorspace and not rebuild. For these reasons, whilst we recommend the implementation of Scenario 2, it is essential that the format of the development is appropriate to the historic context of Conwy and does not undermine the wider vitality and viability of the town centre through providing inappropriate development within the urban form.

Assessment of Floorspace requirements – Comparison Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	Expenditure attributed to Conwy	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	5,327,555	1,619	3,291	0
2005	5,685,453	1,619	3,512	221
2010	6,683,276	1,619	4,128	837
2015	7,779,179	1,619	4,805	1514
2020	8,851,269	1,619	5,468	2177

3.3.23 Scenario 1 for future comparison floorspace requirements demonstrates that using the current trading density of £1,619 per sq m, by 2010 an additional 837 sq m net of comparison floorspace will be required in Conwy. By 2015 this figure will rise to 1,514 sq m net and by 2020 it will rise to 2,177 sq m net.

Scenario 2 – Based on Optimal Trading Density

Scenario 2	Expenditure attributed to Conwy	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	5,327,555	2,500	2,131	0
2005	5,685,453	2,500	2,274	0
2010	6,683,276	2,500	2,673	0
2015	7,779,179	2,500	3,113	0
2020	8,851,269	2,500	3,541	250

3.3.24 Scenario 2 shows that using the Target trading density of £2,500 per sq m, no additional comparison floorspace will be required until 2020, being 250 sq m net.

3.3.25 It is considered that current under-trading within Conwy, as shown in Scenario 1, has not had any detrimental effect on the vitality and viability of Conwy. The types of stores located in the town centre means that lower trading densities can be expected due to the tourist nature of the area. As such, Scott Wilson recommends Scenario 2, as there is no need to allocate specific sites. However, if a scheme comes forward which complements the role and function of Conwy, then it should be recognised that an increase in the quantum of floorspace would not necessarily be detrimental the vitality of Conwy.

3.4 Abergele

General

3.4.1 Abergele lies approximately seven miles to the east of Colwyn Bay. It is a small linear centre that has a distinctive townscape character with a number of landmark buildings throughout the centre.

3.4.2 In terms of the number of food/convenience units, Abergele is below the GB average, being 6.34% compared with 9.38%. However, it should be noted that the Tesco store, which although only counts as one unit, provides a significant amount of floorspace and a large range of convenience goods.

3.4.3 Abergele has significantly less comparison units than the GB average, reflecting its role in the retail hierarchy. Vacancies in Abergele are relatively low, being 5.63% compared with the GB average of 10.87%.

3.4.4 Abergele has a well above average number of service units compared with the GB average. This indicates that Abergele has a good provision of banks, estate agents, restaurants, pubs and other basic service infrastructure.

3.4.5 The town centre does not contain many multiple retailers. In terms of convenience multiple retailers there is a large Tesco store located on Market Street. In comparison, there is a relatively large number of independent comparison and convenience retailers in the town centre.

3.4.6 When comparing the number of retail units to the GB average it can be seen that there is a lack of comparison shops. As such, it is considered that the centre has a weak comparison retail offer. The lack of comparison retailers is due to the close proximity of Abergele to Colwyn Bay and Rhyl as these centres contain a larger number of retail stores and hence a larger number of comparison retailers. It is also representative of Abergele's role in the retail hierarchy. As such, it is considered that the proximity of Abergele to these centres reduces its ability to maintain a large and varied retail sector, although the centre does adequately serve local everyday needs.

3.4.7 Abergele is well served by regular bus services with a number of the stops in Market Street. The Pensarn railway station is located on Marine Road and offers frequent train services to Llandudno and Manchester. The station is located approximately one mile to the north-east of the town centre and as such it is not within easy walking distance of the town centre. It is noted, however, that bus no. 12 stops on Marine Road near the station and runs to the town centre.

3.4.8 In terms of public transport, a number of bus services run to Abergele town centre at regular intervals. Also, although Abergele town centre is located some distance away from the station, it is accessible by a frequent bus service.

3.4.9 Abergele is dominated by cars and is lacking in the provision of bicycle routes and facilities.

3.4.10 Abergele town centre has a distinctive townscape character with a number of landmark buildings throughout the centre. However, due to the large amount of traffic in the town centre, Abergele is considered to be a low quality environment.

3.4.11 Overall, Abergele has an attractive townscape, however, it has become dominated by cars, which is to the detriment of the towns vitality and viability.

Assessment of Floorspace Requirements – Convenience Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	**Expenditure attributed to Abergele**	**Actual £ per sq m**	**Floor space requirement (sq m net)**	**Additional floorspace requirement (sq m net)**
2003	13,501,605	3,766	3,585	0
2005	13,639,052	3,766	3,621	36
2010	14,049,058	3,766	3,730	145
2015	14,519,778	3,766	3,855	270
2020	15,037,452	3,766	3,993	408

3.4.12 Scenario 1 shows future convenience floorspace requirements if Abergele continues under-trading at its current density of £3,766 per sq m. It shows that by 2010 145 sq m net of additional convenience floorspace is required. By 2015 this will increase to 270 sq m net and then to 408 sq m by 2020.

Scenario 2 – Based on Optimal Trading Density

Scenario 2	Expenditure attributed to Abergele	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	13,501,605	5,000	2,700	0
2005	13,639,052	5,000	2,728	0
2010	14,049,058	5,000	2,810	0
2015	14,519,778	5,000	2,904	0
2020	15,037,452	5,000	3,007	0

3.4.13 Scenario 2 for convenience goods shows that using the Target trading density of £5,000 per sq m, no additional convenience floorspace is required during the Plan period.

3.4.14 The current under-trading has not necessarily had a negative impact on the vitality and viability of the town centre. In planning for future growth, the Planning Authority should not specifically constrain convenience floorspace to alleviate this under-trading. However, Scott Wilson recommends that the Planning Authority should implement Scenario 2 and not allocate retail sites within the LDP, as there is no identified quantitative need up to 2020. Instead, the Planning Authority should consider the planning merits of individual convenience retail proposals as and when schemes come forward. These schemes should be considered in the context of the fact that Abergele is under-trading.

Assessment of Floorspace Requirements – Comparison Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	Expenditure attributed to Abergele	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	4,500,575	1,622	2,774	0
2005	4,802,917	1,622	2,960	186
2010	5,645,851	1,622	3,480	706
2015	6,571,641	1,622	4,051	1277
2020	7,477,313	1,622	4,609	1835

3.4.15 Scenario 1 for future comparison floorspace requirements in Abergele shows this centre trading at a density of £1,622 per sq m. By 2010 an additional 706 sq m net of comparison floorspace will be required, rising to 1,277 sq m net by 2015 and then to 1,835 sq m net by 2020.

Scenario 2 – Based on Optimal Trading Density

Scenario 2	Expenditure attributed to Abergele	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	4,500,575	2,500	1,800	0
2005	4,802,917	2,500	1,921	0
2010	5,645,851	2,500	2,258	0
2015	6,571,641	2,500	2,629	0
2020	7,477,313	2,500	2,991	217

3.4.16 Scenario 2 for comparison goods shows that using the Target trading density of £2,500 per sq m, no additional comparison floorspace will be required until 2020, being 217 sq m net.

3.4.17 Scott Wilson recommends that the Planning Authority should implement Scenario 2 and not allocate retail sites within the LDP, as there is no identified quantitative need until 2020. Instead, the Planning Authority should consider the planning merits of individual comparison retail proposals as and when schemes come forward. These schemes should be considered in the context of the fact that Abergele is under-trading.

3.5 Llanrwst

General

3.5.1 Llanrwst is an important market town and is set in a rural location, therefore, it is the focal point for the rural communities that surround it and the town fulfils an important local role and function.

3.5.2 In terms of the number of food/convenience units, Llanrwst is very similar to the GB average, being 9.6% compared with 9.38%, however, it has significantly less comparison units than the GB average. The number of service units is on par with the GB average.

3.5.3 Vacancies in Llanrwst are lower than the GB average, being 6.4% compared with the GB average of 10.87%. This equates to eight vacant units being located in the town centre.

3.5.4 The low level of vacant floorspace highlights the relative economic prosperity of the centre and thus, its strong vitality and viability. However, it is noted that many retail units have been occupied by miscellaneous uses over the time period (particularly convenience). The decline in vacancy rates is not directly representative of an increase in vitality and viability of the retail economy.

3.5.5 Llanrwst only contains two main retailers in the town centre, being a Somerfield store on Plough Fields and a Spar store on Ancaster Square. In comparison, it has a healthy range of independent retailers who provide a local service to the catchment area of the settlement. It is these retailers that help to create and maintain the local character of this rural centre.

3.5.6 In terms of public transport, Llanrwst is served by a number of bus services. Two railway stations serve Llanrwst, being Llanrwst and North Llanrwst, on the Conwy Valley Line. Trains run to Llandudno Junction, Llandudno and Blaenau Ffestiniog at regular intervals.

3.5.7 Overall, Llanrwst provides public transport options that link this rural town to the immediate surrounding area and other centres in Wales.

3.5.8 Llanrwst is dominated by cars as the A548 passes through the town centre. It is recognised that there are pedestrian routes in the town centre, however, these are rather narrow and therefore do not allow easy movement, in particular the pedestrian route from the Somerfield store to the main shopping area is relatively narrow. Llanrwst is lacking in the provision of bicycle routes and facilities.

3.5.9 In terms of car parking there is a car park adjacent to the Somerfield store and a car park adjacent to the swimming pool. Limited on street parking is also available. However, overall, the Somerfield store offers the most central parking area. It is considered that the level of parking in Llanrwst is adequate.

3.5.10 Llanrwst is a distinctive and attractive market town. It contains a number of landmark buildings and open space areas that combine to make the centre visually appealing. Retailing in the town centre is based around Ancaster Square.

3.5.11 Overall, Llanrwst contains a diverse retail offer and overall is considered to be a vital and viable town centre. It is an attractive market town, which is in a rural location and is relatively remote from other centres in the Borough.

Assessment of Floorspace Requirements – Convenience Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	Expenditure attributed to Llanrwst	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	1,863,883	1,257	1,483	0
2005	1,882,858	1,257	1,498	15
2010	1,939,459	1,257	1,543	60
2015	2,004,441	1,257	1,595	112
2020	2,075,906	1,257	1,652	169

3.5.12 Scenario 1 demonstrates the convenience floorspace requirements if Llanrwst continues under-trading at the current density of £1,257. It shows that by 2010 60 sq m net of additional convenience floorspace is required. By 2015 this will increase to 112 sq m net and by 2020 it will increase to 169 sq m net.

Scenario 2 – Based on Optimal Trading Density

Scenario 2	Expenditure attributed to Llanrwst	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	1,863,883	4,000	466	0
2005	1,882,858	4,000	471	0
2010	1,939,459	4,000	485	0
2015	2,004,441	4,000	501	0
2020	2,075,906	4,000	519	0

3.5.13 Scenario 2 for convenience goods, shows that using the Target trading density of £4,000 per sq m, there is no requirement for additional convenience floorspace during the Plan period (up to 2020).

3.5.14 The current under-trading has not necessarily had a negative impact on the vitality and viability of the centre. The Planning Authority should not specifically constrain convenience floorspace to alleviate this under-trading. However, Scott Wilson recommends that the Planning Authority should implement Scenario 2 and not allocate retail sites within the LDP, as there is no identified quantitative need up to

2020. Instead, the Planning Authority should consider the planning merits of individual convenience retail proposals as and when schemes come forward. These schemes should be considered in the context of the fact that Llanrwst is under-trading.

Assessment of Floorspace Requirements – Comparison Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	Expenditure attributed to Llanrwst	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	1,832,984	573	3,200	0
2005	1,956,121	573	3,415	215
2010	2,299,430	573	4,014	814
2015	2,676,483	573	4,673	1,473
2020	3,045,348	573	5,317	2,117

3.5.15 Scenario 1 for comparison goods demonstrates that Llanrwst is currently trading at £573 per sq m. It shows that by 2010 an additional 814 sq m net of comparison floorspace will be required in Llanrwst. By 2015 this figure will rise to 1,473 sq m net and by 2020 it will rise to 2,117 sq m net.

Scenario 2 – Based on Optimal Trading Density

Scenario 2	Expenditure attributed to Llanrwst	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	1,832,984	2,000	916	0
2005	1,956,121	2,000	978	0
2010	2,299,430	2,000	1,150	0
2015	2,676,483	2,000	1,338	0
2020	3,045,348	2,000	1,523	0

3.5.16 Scenario 2 demonstrates the comparison floorspace requirements if Llanrwst trades at £2,000 per sq m. It shows that no additional comparison floorspace is required during the Plan period.

3.5.17 It is considered that the floorspace should be constrained in order to increase the vitality and viability of the centre. We recommend that Scenario 2 be implemented to increase the trading density to the 'Target' rate in order to increase the vitality of the centre and ensure the viability of existing businesses.

3.6 Llandudno Junction

General

3.6.1 Llandudno Junction is located to the south-east of Llandudno, consisting of two shopping areas and a retail park which contains convenience stores for car-based travel. It is noted that the retail units on Conwy Road are interspersed with housing. In terms of the number of food/convenience units, Llandudno Junction is slightly above the GB average, being 10.39% compared with 9.38%.

3.6.2 Llandudno Junction has a significantly less number of comparison units, compared to the GB average, being 14.29% compared with 49.02%, representing its role as a small centre serving local needs.

3.6.3 The number of service units in Llandudno Junction is similar to the GB average, being 27.27% compared with the GB average of 29.26%.

3.6.4 Vacancies in Llandudno Junction are relatively similar to the GB average, being 9.09% compared with the GB average of 10.87%. This equates to seven vacant units being located in the town centre. The level of vacant floorspace highlights the relative economic prosperity of Llandudno Junction and thus, its reasonably strong vitality and viability.

3.6.5 The settlement offers a range of goods that serve the needs of the local catchment population. There is a good provision of multiple convenience retailers, including an Iceland store, a Netto store, a Co-op store and a Tesco Store.

3.6.6 There are no national comparison retailers in the main shopping area. This demonstrates that Llandudno Junction is lacking in the comparison sector. However, attracting large multiple retailers to Llandudno Junction is difficult due it its small local catchment population and proximity to Llandudno. Instead Llandudno Junction should consolidate itself as a local centre serving the local population's day-to-day needs.

3.6.7 Llandudno Junction has a healthy range of independent retailers who provide a service to the catchment area of the settlement. Due to the lack of multiple retailers, it is important not only that independent traders offer a wide range of services, but that they help to maintain the local character of the settlement.

3.6.8 In terms of public transport, a number of buses stop in Llandudno Junction. These buses provide a local service, however, the majority of them link Llandudno Junction to other centres in North Wales, including Llandudno and Conwy.

3.6.9 Llandudno Junction contains a railway station, which is adjacent to the main shopping area on Conwy Road. This station is on the Crewe to Holyhead North Wales Coast Line. There are frequent services to Holyhead, Bangor, Llandudno, Colwyn Bay, Rhyl, Chester, Crewe, Cardiff, Manchester and London Euston.

3.6.10 Overall, the provision of public transport in Llandudno Junction is relatively good. There is a range of bus services that stop in Llandudno Junction and link this centre to the surrounding area and the rest of Wales. The train station is well located to enable easy access to this centre from other centres in Wales and England.

3.6.11 Llandudno Junction is a relatively small compact centre that contains housing in close proximity to the main shopping area on Conwy Road. As such, it is considered that the centre offers easy access into the town centre by foot.

3.6.12 Bicycle route provision and facilities are somewhat lacking in Llandudno Junction.

3.6.13 Access to Llandudno Junction by car is adequate with the A55 running near this centre. The A547 runs to the west of the town centre and the A470 runs to the east of the town centre. The main shopping road, Conwy Road, runs between these two main roads.

3.6.14 Llandudno Junction has one main car parking area, which is located in the large surface level car park on the southern side of Conwy Road. On-street car parking is also available in the centre. It is considered that the parking provision in Llandudno Junction is adequate.

3.6.15 The centre is dominated by the road environment as Conwy Road (the A547) runs through the shopping area and carries a relatively large volume of traffic and compromises the attractiveness of the environment. It is also detrimental to the vitality and viability of the town centre, however, due to the limited size of the centre and the relative importance of the A547, it is considered that traffic calming measures would prove unviable.

3.6.16 Overall, Llandudno Junction contains a relatively small shopping area, however, it is still a reasonably vital and viable centre serving local needs.

Assessment of Floorspace Requirements – Convenience Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	Expenditure attributed to Llandudno Jct	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	21,484,278	5,757	3,732	0
2005	21,702,995	5,757	3,770	38
2010	22,355,413	5,757	3,883	151
2015	23,104,440	5,757	4,013	281
2020	23,928,184	5,757	4,157	425

3.6.17 Scenario 1 shows the future convenience floorspace requirements for Llandudno Junction if continuing the current trading density of £5,757. This trading density is relatively low considering that the majority of convenience floorspace within Llandudno Junction is provided through multiple retailers, which have a relatively high trading density. It shows that by 2010, 151 sq m (net) of additional convenience floorspace is required. By 2015 this will increase to 281 sq m net and by 2020 it will increase to 425 sq m net.

Scenario 2 – Based on Optimal Trading Density

Scenario 2	Expenditure attributed to Llandudno Jct	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	21,484,278	7,500	2,865	0
2005	21,702,995	7,500	2,894	0
2010	22,355,413	7,500	2,981	0
2015	23,104,440	7,500	3,081	0
2020	23,928,184	7,500	3,190	0

3.6.18 Scenario 2 shows Llandudno Junction trading at an optimal trading density of £7,500 per sq m. It demonstrates that no additional convenience floorspace is required up to 2020.

3.6.19 Whilst it is considered that the current trading level in Llandudno Junction, as shown in Scenario 1, has not had any detrimental effect on the vitality and viability of this centre, it is also Scott Wilson's opinion that the provision of additional convenience floorspace within Llandudno Junction would be detrimental to both Llandudno Junction and surrounding settlements. We, therefore, recommend implementing Scenario 2 as the local planning authority should constrain any additional convenience floorspace within Llandudno Junction.

3.7 Kinmel Bay

General

3.7.1 Kinmel Bay is a relatively small seaside town lying approximately two miles to the west of Rhyl town centre.

3.7.2 Kinmel Bay is significantly different in terms of the types of retail uses in the town centre compared with GB averages. With respect to food/convenience units, Kinmel Bay has a greater percentage number of units (14%) than the GB average (9%). It is estimated that there are 40,000 self-catering bed spaces in caravans and chalets located in Kinmel Bay and the nearby township of Towyn, therefore, these units service local convenience needs.

3.7.3 The number of units selling comparison goods is significantly lower than the GB average, being 17.24% compared with 49.02% due to its role in the retail hierarchy and its function of serving the tourist community.

3.7.4 The number of service units is also higher than the GB average, which is due to Kinmel Bay being a tourist destination on the coast. Vacancies are well below the GB average, with only 3.45% of units vacant compared to 10.87%.

3.7.5 The settlement offers a range of goods that serve the needs of the local catchment population and the tourist community. There is a good provision of convenience retailers, including an Asda store on St. Asaph Avenue, however, there are no national comparison retailers in the main shopping area (other than the Asda store, which sells a range of comparison goods). This is due to the close proximity of Kinmel Bay to Rhyl and the fact that Kinmel Bay is a local service centre.

3.7.6 Kinmel Bay has a small number of retail units, however it has a healthy range of independent retailers who provide a service to the catchment area of the settlement. Due to the lack of multiple retailers, it is important not only that independent traders offer a wide range of services, but that they help to maintain the local character of the settlement.

3.7.7 There is no railway station in Kinmel Bay, however, one is located in the nearby town of Rhyl. Trains run to include Holyhead, Bangor, Llandudno, Colwyn Bay, Chester, Crewe, London Euston and Manchester from Rhyl. There are also national and local bus routes via Rhyl that stop in Kinmel Bay.

3.7.8 Kinmel Bay is not as easily accessed by public transport as the other centres in the study area. However, this is to be expected considering that it is relatively small tourist town. It is considered that the public transport provision is adequate.

3.7.9 Kinmel Bay is a relatively small compact centre that contains housing and tourist accommodation in close proximity to the main shopping area. As such, it is considered that the centre offers easy access into the town centre by foot. Bicycle route provision and facilities are somewhat lacking in Kinmel Bay.

3.7.10 The A458 (Foryd Road) runs through the town centre, therefore, providing easy access to the shopping area in Kinmel Bay. A car parking area is located on St Asaph Avenue to the rear of the ASDA store. This car parking is within easy walking distance from the shopping area in Kinmel Bay. It is considered that the level of parking in Kinmel Bay is adequate.

3.7.11 Kinmel Bay is an attractive seaside town and is considered to have a vital and viable town centre, which offers an adequate range of services to serve the local population and tourists.

Assessment of Floorspace Requirements – Convenience Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	Expenditure attributed to Kinmel Bay	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	17,145,687	5,691	3,013	0
2005	17,320,236	5,691	3,044	31
2010	17,840,403	5,691	3,135	122
2015	18,438,570	5,691	3,240	227
2020	19,096,065	5,691	3,356	343

3.7.12 Scenario 1 shows the future convenience floorspace requirements for Kinmel Bay if the centre continues trading at the current density of £5,691 per sq m. It shows that by 2010, 122 sq m net of additional convenience floorspace is required. By 2015 this will increase to 227 sq m net and by 2020 it will increase to 343 sq m net.

Scenario 2 – Based on Optimal Trading Density

Scenario 2	Expenditure attributed to Kinmel Bay	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	17,145,687	7,500	2,286	0
2005	17,320,236	7,500	2,309	0
2010	17,840,403	7,500	2,379	0
2015	18,438,570	7,500	2,458	0
2020	19,096,065	7,500	2,546	0

3.7.13 Scenario 2 shows that using the Target trading density of £7,500 per sq m for Kinmel Bay, no additional convenience floorspace is required up to 2020.

3.7.14 It is considered that the current trading level in Kinmel Bay has not had a negative impact on the vitality and viability of the town centre. Convenience provision within Kinmel Bay is dominated by the ASDA store and there is no qualitative need for additional convenience floorspace especially from large format retailers. Scott Wilson recommends that further convenience floorspace provision should be restricted in Kinmel Bay, especially from large format retailers. Further sites should not be allocated within the LDP, as evident in Scenario 2. In saying that, if a scheme comes forward which is based on a small format convenience store(s), which serve the local market, then the quantitative need for the scheme would be justified based on Scenario 1. However, Scott Wilson does not recommend allocating specific sites for small format convenience stores.

Assessment of Floorspace Requirements – Comparison Goods

Scenario 1 – Based on Current Trading Density

Scenario 1	Expenditure attributed to Kinmel Bay	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	2,990,924	2,870	1,042	0
2005	3,191,850	2,870	1,112	70
2010	3,752,034	2,870	1,307	265
2015	4,367,281	2,870	1,522	480
2020	4,969,160	2,870	1,731	689

3.7.15 Scenario 1 for future comparison floorspace requirements for Kinmel Bay demonstrates that if the centre continues trading at the current density of £2,870 per sq m, by 2010 an additional 265 sq m net of comparison floorspace will be required in Kinmel Bay. By 2015 this figure will rise to 480 sq m net and by 2020 it will rise to 689 sq m net.

Scenario 2 – Based on Optimal Trading Density

Scenario 2	Expenditure attributed to Kinmel Bay	Actual £ per sq m	Floor space requirement (sq m net)	Additional floorspace requirement (sq m net)
2003	2,990,924	2,500	1,196	154
2005	3,191,850	2,500	1,277	235
2010	3,752,034	2,500	1,501	459
2015	4,367,281	2,500	1,747	705
2020	4,969,160	2,500	1,988	946

3.7.16 Scenario 2 for comparison goods in Kinmel Bay shows that using the Target trading density of £2,500 per sq m, 459 sq m net of additional comparison floorspace will be required by 2010, rising to 705 sq m net by 2015 and then to 946 sq m net by 2020.

3.7.17 It is evident that there is a requirement for comparison floorspace based on the retail model used within this report, due to the ASDA attracting trade into the area. However, in determining future floorspace requirements, the role and function of Kinmel Bay must be considered. Comparison goods provision in Kinmel Bay should primarily be targeted at meeting the needs of local residents and tourists on a day-to-day shopping basis. Therefore, whilst this study identifies a need for additional floorspace in Kinmel Bay, any proposals should be considered in the local context of Kinmel Bay having regard to the role and function of the centre.

3.7.18 The Council should not specifically seek to implement either of the above scenarios and Scott Wilson recommends that no retail sites should be allocated within the LDP. However, if the ASDA were to be lost from Kinmel Bay, it is likely that trade would be diverted to supermarkets in Abergele and Rhyl. Kinmel Bay would provide more of a local role for local residents and tourists on a day-to-day basis.

4. CONCLUSIONS

4.1 Llandudno

4.1.1 Llandudno is currently undertrading in regards to convenience goods, however this has not had any detrimental effects on the vitality and viability of Llandudno and has indeed added to the vibrancy of the centre. When taking into account the existing floorspace commitment, it can be seen that no additional convenience floorspace will be required during the plan period up to 2020.

4.1.2 The future floorspace requirements for Llandudno have also been assessed. It appears that in answering survey questions, some people may have incorrectly assumed that Llandudno Junction was actually the Mostyn Champney Retail Park. In order to correct this perceived assumption we have added the total amount of comparison floor area and expenditure to the figures for Llandudno. By 2010 an additional 8,521 sq m net of comparison floorspace will be required. By 2015 this will rise to 15,409 sq m and by 2020 it will rise to 22,147 sq m net.

4.2 Colwyn Bay

4.2.1 Colwyn Bay is currently undertrading in regards to convenience goods. In planning for future growth, the Local Planning Authority should not specifically constrain convenience floorspace to alleviate this undertrading. Scott Wilson recommends that the Planning Authority should implement Scenario 2 and not allocate retail sites within the LDP. Instead, the Planning Authority should consider the planning merits of individual convenience retail proposals as and when schemes come forward, in the context of the fact the Colwyn Bay is undertrading.

4.2.2 In terms of comparison goods, we recommend that floorspace should be constrained until at least 2015. Scenario 2 should be implemented.

4.3 Conwy

4.3.1 Convenience stores in Conwy are currently overtrading to a significant extent. There would be qualitative benefits in the development of a retail facility that provides top up shopping facilities. However it is recognised that there are no appropriate sites within the town centre. Given the historic characteristics of

Conwy, the retention of the historic environment should take precedence over fulfilling the identified convenience need.

4.3.2 Conwy is currently undertrading in regards to comparison goods. As such, Scott Wilson recommends Scenario 2, as there is no need to allocate specific sties, however, if a scheme comes forward which complements the role and function of Conwy, then it should be recognised that an increase in the quantum of floorspace would not necessarily be detrimental to the vitality of Conwy.

4.4 Abergele

4.4.1 Convenience stores in Abergele are currently undertrading. Scott Wilson recommends that the Planning Authority should implement Scenario 2 and not allocate retail sites within the LDP, as there is no identified quantitative need upto 2020. Instead, the Planning Authority should consider the planning merits of individual convenience retail proposals as and when schemes come forward, in the context of the fact the Abergele is undertrading.

4.4.2 Abergele is undertrading in regards to comparison goods, therefore Scott Wilson recommends that the Planning Authority should implement Scenario 2 and not allocate retail sites within the LDP. Instead, the Planning Authority should consider the planning merits of individual comparison retail proposals as and when schemes come forward, in the context of the fact the Abergele is undertrading.

4.5 Llanrwst

4.5.1 For convenience goods, Scenario 1 shows that Llanrwst is currently undertrading. Scott Wilson recommends that the Planning Authority should implement Scenario 2 and not allocate retail sites within the LDP. Instead, the Planning Authority should consider the planning merits of individual comparison retail proposals as and when schemes come forward, in the context of the fact the Llanrwst is undertrading.

4.5.2 The assessment for comparison goods shows that Llanrwst is currently undertrading. It is considered that floorspace should be constrained in order to increase the vitality and viability of the centre. We recommend Scenario 2.

4.6 Llandudno Junction

4.6.1 It is considered that the current undertrading has not had any detrimental effect on the vitality and viability of this centre. It should be noted that the development of extra convenience floorspace could have a limited benefit on the way the centre operates due to the characteristics of existing retailers within the centre. Scott Wilson do not recommend the allocation of any further floorspace within Llandudno Junction. Scenario 2 should be implemented.

4.7 Kinmel Bay

4.7.1 Kinmel Bay is currently undertrading, therefore, Scott Wilson recommends that further convenience floorspace provision should be restricted, especially from large format retailers. Further sites should not be allocated in the LDP. If a scheme comes forward which would serve the local market, then quantitative need for the scheme would be justified based on Scenario 1.

4.7.2 Comparison goods provision should be primarily targeted at meeting the needs of the local residents and tourists on a day-to-day shopping basis. Whilst this study identifies a need for additional floorspace in Kinmel Bay, any proposals should be considered in context, having regard to the role and function of the centre. Scott Wilson recommends that no comparison retail sites should be allocated within LDP.

Appendix 1

Table 1 – Requirement for Convenience Goods Floorspace for inclusion in the LDP

Location	Convenience Goods (sq m) Scenario 1 (at actual trading level)	Convenience Goods (sq m) Scenario 2 (at target trading level)	Recommendations made by Scott Wilson	Conwy County Borough Council's Comments
Llandudno 2010 2015 2020	333 619 934	0 0 0	The current under-trading has not had any detrimental effect on Llandudno. Taking into account existing floor space commitment, no additional floor space will be required within the plan period.	No need to allocate sites within the Local Development Plan.
	Actual £ per sq m	**Target £ per sq m**		
Trading Densities	£5,628	£7,500		
Colwyn Bay 2010 2015 2020	250 465 702	0 0 0	It is evident that convenience stores are under-trading, however, this has not had an impact on the viability and vitality of the town centre. The LPA should not specifically constrain convenience floor space to alleviate under trading. Each convenience proposal should be considered individually on its own merits.	No need to allocate sites within the Local Development Plan.
	Actual £ per sq m	**Target £ per sq m**		
Trading Densities	£4,077	£5,000		
Conwy 2010 2015 2020	23 43 65	438 472 509	Convenience stores are significantly overtrading which may be detrimental to resident's choice and quality of retail experience. Whilst there would be a qualitative benefit in the development of a retail facility that provides 'top-up' shopping on a day to day basis, it is recognised that there are no appropriate sites within the town centre. Whilst Scenario 2 should be followed, the retention of the historic environment should take precedence over fulfilling retail need.	No need to allocate sites within the Local Development Plan.
	Actual £ per sq m	**Target £ per sq m**		
Trading Densities	£8,477	£5,000		

Location		Convenience Goods (sq m) Scenario 1 (at actual trading level)	Convenience Goods (sq m) Scenario 2 (at target trading level)	Recommendations made by Scott Wilson	Conwy County Borough Council's Comments
Abergele	2010 2015 2020	145 270 408	0 0 0	Abergele is currently under-trading. However, the LPA should not specifically constrain convenience floor space to alleviate under trading, but consider proposals on an individual basis. If floor-space is forthcoming, it is essential that it should be for high quality retail, capable of attracting new expenditure and producing benefits for existing retailers. Scenario 2 should be followed.	No need to allocate sites within the Local Development Plan.
		Actual £ per sq m	**Target £ per sq m**		
Trading Densities		£3,766	£5,000		
Llanrwst	2010 2015 2020	60 112 169	0 0 0	Llanrwst is currently under-trading, The LPA should not specifically constrain convenience floor space to alleviate under trading, but consider proposals for convenience goods on an individual basis. Any new floor space should be for high quality retail capable of attracting new expenditure and producing benefits for existing retailers. Scenario 2 should be followed.	No need to allocate sites within the Local Development Plan.
		Actual £ per sq m	**Target £ per sq m**		
Trading Densities		£1,257	£4,000		
Llandudno Jct	2010 2015 2020	151 281 425	0 0 0	The current level of trading has not had any detrimental effect on the vitality / viability of the town centre and although the development of additional floor space could have limited benefits to the way the centre operates. It is recommended that scenario 2 be followed so as not to divert expenditure away from near by centres such as Llandudno.	No need to allocate sites within the Local Development Plan.
		Actual £ per sq m	**Target £ per sq m**		
Trading Densities		£5,757	£7,500		

Location	Convenience Goods (sq m) Scenario 1 (at actual trading level)	Convenience Goods (sq m) Scenario 2 (at target trading level)	Recommendations made by Scott Wilson	Conwy County Borough Council's Comments
Kinmel Bay 2010 2015 2020	122 227 343	0 0 0	Convenience floor space within Kinmel Bay is currently under trading, although this has not had any detrimental effect. Further convenience floor-space should be restricted (especially from large format retailers). However, a small convenience store to serve the local market could be justified based on scenario 1.	No need to allocated sites within the Local Development Plan
	Actual £ per sq m	**Target £ per sq m**		
Trading Densities	£5,691	£7,500		

Table 2 – Requirement for Comparison Goods Floorspace for inclusion in the LDP

Location	Comparison Goods (sq m) Scenario 1 (at actual trading level)	Comparison Goods (sq m) Scenario 2 (at target trading level)	Recommendations made by Scott Wilson	Conwy County Borough Council's Comments
Llandudno / Llandudno Jct. 2010 2015 2020	8,521 15,409 22,147	11,426 18,790 25,994	Comparison stores are overtrading. It is recommended that scenario 1 be followed. Taking into account existing commitments, no additional floor space will be required until 2015.	No immediate need to allocate sites (before 2015), however the possible need for additional floor-space will be reviewed by a Retail Study in 2011.
	Actual £ per sq m	**Target £ per sq m**		
Trading Densities	£4,811	£4,500		
Colwyn Bay 2010 2015 2020	4,648 8,406 12,081	0 0 0	Colwyn Bay is currently under trading. As such the amount of floor space should be maintained at current levels until 2015. It is recommended that scenario 2 be applied to increase trading density to increase the vitality of the town centre. Any new floor space that does come forward within the plan period should be of high quality and capable of producing benefits for existing retailers.	No immediate need to allocate sites (before 2015), however the possible need for additional floor-space beyond 2015 will be reviewed by a Retail Study in 2011.
	Actual £ per sq m	**Target £ per sq m**		
Trading Densities	£1,367	£2,500		
Conwy 2010 2015 2020	837 1514 2,177	0 0 250	Conwy is under trading but this has not has any detrimental effect on the vitality of the town. Therefore the LPA should not seek to alleviate this issue. Scenario 2 should be followed.	No need to allocate sites within the Local Development Plan.
	Actual £ per sq m	**Target £ per sq m**		
Trading Densities	£1,619	£2,500		

Location	Comparison Goods (sq m) Scenario 1 (at actual trading level)	Comparison Goods (sq m) Scenario 2 (at target trading level)	Recommendations made by Scott Wilson	Conwy County Borough Council's Comments
Abergele 2010 2015 2020	706 1,277 1,835	0 0 217	Abergele is under trading but this has not has any detrimental effect on the vitality of the town. Therefore the LPA should not seek to alleviate this issue. Scenario 2 should be followed.	No need to allocate sites within the Local Development Plan.
	Actual £ per sq m	**Target £ per sq m**		
Trading Densities	£1,622	£2,500		
Llanrwst 2010 2015 2020	814 1,473 2,117	0 0 0	Llanrwst is significantly under trading. As such, no additional comparison floor space is required. Any new floor space that does come forward within the plan period should be of high quality and capable of producing benefits for existing retailers. It is also important to monitor Llanrwst to ensure that quality provision does not decrease over time.	No need to allocate sites within the Local Development Plan.
	Actual £ per sq m	**Target £ per sq m**		
Trading Densities	£573	£2,000		
Kinmel Bay 2010 2015 2020	265 480 689	459 705 946	There is a requirement for future comparison floor space in Kinmel Bay. This provision should be targeted at meeting the needs of local residents and tourists on a day to day shopping basis. The LPA should not seek to implement either of the scenarios.	No need to allocate sites within the Local Development Plan.
	Actual £ per sq m	**Target £ per sq m**		
Trading Densities	£2,870	£2,500		