

# Town Centre Health Check 2022

# Town Centre Health Check 2022

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# Town Centre Health Check 2022

## 1. Background

Denbighshire has a highly attractive and varied built environment with a mix of urban areas along the coast, market towns in the Vale of Clwyd and river Dee valley, and villages in the rural countryside. Improving the vibrancy and accessibility of those places is not only essential for promoting the local economy but also for fostering a strong tourism sector in the county.

Vibrant town centres are multifunctional; i.e., they offer a mix of retail, commercial services and leisure facilities to residents and visitors beyond the traditional shop opening hours. Places are enhanced by well-maintained buildings, plenty of green spaces and easy access by public transport to contribute towards a 'sense of place', identity and well-being. The objective is to continually create new business opportunities that lead to a diversification in the local offer and, hence, decrease dependency on single economic sectors.

In 2018, the Council carried out the first town centre health check to gain a better understanding of available retail and services, transport infrastructure and local footfall. The subsequent report complemented the annual survey work on town centre occupancy and aimed to provide a good basis for future health checks. The Covid-19 pandemic and a further reduction in the previously prevailing traditional 'bricks and mortar' retail offer pose new challenges for planning professionals, local businesses and resilient town centre strategies.

Planning Policy Wales ("PPW") sets out the policy framework for decision-making and strategic planning in terms of creating successful and sustainable town centres in Wales. It is supplemented by Technical Advice Note 4 "Retail and Commercial Development" that encourages local planning authorities to carry out regular town centre health checks as they provide an indication of policy effectiveness and the impact of major developments on vitality and viability.

## **Town Centre Health Check 2022**

Since the publication of the first town centre health check in 2018, Welsh Government (“WG”) have introduced ‘Future Wales: The National Plan 2040’ (February 2021), which became part of the development plan for the county, and set out its priorities for the Covid-19 pandemic recovery period in ‘Building Better Places: The Planning System Delivering Resilient and Brighter Futures’ (July 2020). Both documents bring about a policy change in terms of acknowledging the rising importance of complementary land uses in support of addressing the adverse effects of declining retail on town centres. Future town centre health checks will be crucial in identifying the effects and opportunities that are arising from these policy changes.

# Town Centre Health Check 2022

## 2. Methodology

WG Technical Advice Note 4 sets out a range of indicators to test the viability and vitality of town centres such as, vacancy levels and footfall figures. Local authorities are encouraged to supplement them with easily available data that do not require a great amount of time and resources to collect. The Local Government Association published a handbook on town centre revitalisation for interested parties [see 'Revitalising town centres: a handbook for council leadership' (2018), <https://www.local.gov.uk/publications/revitalising-town-centres-handbook-council-leadership>]

The Manchester Metropolitan University's Institute for Place Management participated in the 'High Street UK2020' project and triggered further scientific research in the interpretation of footfall figures which resulted in the development of 'Town Centre Signatures' [see Institute for Placemaking 'Bringing Big data to Small Users', [www.placemanagement.org/research/footfall-signatures](http://www.placemanagement.org/research/footfall-signatures)]. The approach differs from traditional town centre surveys in focussing on footfall figures to evaluate a town centre's attractiveness by all available forms of land use/ services instead of primarily looking at the presence of what are deemed essential retail outlets in a town of certain size. Shifting the point of attention from retail to all town centre uses coincides with the latest changes in Welsh planning policy.

This report was prepared on the basis of the following sources of data, surveys and methods:

- Statistics published by ONS, StatsWales and the Council;
- Figures collected from local footfall counters;
- Results from the annual Denbighshire town centre surveys;
- Complementary data obtained in relation to residents' views that were expressed in the Denbighshire Resident Surveys 2015 and 2018;
- Institute of Place Management: town centre signatures – empirical analysis of footfall figures in comparison with individual signature types; and
- Includes the local town and city centres of Corwen, Denbigh, Llangollen, Prestatyn, Rhuddlan, Rhyl, Ruthin and St Asaph.

# Town Centre Health Check 2022

## 3. Local Development Plan: Retail planning and empirical data

### Denbighshire Retail Study 2018

The Council has commenced the preparation of the next Local Development Plan (“LDP”), which sets out where and how much development is going to take place during the plan period. Local policy must be prepared on the basis of evidence and in line with national objectives. The Denbighshire Retail Study 2018 was commissioned with the objective to identify existing retail capacity and future demand in line with projected growth levels, anticipated residential development and tourism growth. It is available for viewing on the Council’s website. Link: [www.denbighshire.gov.uk/ldp](http://www.denbighshire.gov.uk/ldp).

Prepared prior to the Covid-19 pandemic, the study identified three trends that are likely to influence future demand in retail:

1. Population Growth - All areas are expected to see population growth, particularly the Elwy area where the Key Strategic Site is allocated for housing for approximately 5,000 new residents or an increase of 33%;
2. Online Sales - Online sales will continue to increase, albeit at a slower pace than in previous years. Convenience retail + 10 years = 1.5% decline due to online sales and Comparison + 10 years = 2.9% decline due to online sales; and
3. Tourism Trends - There has been a 20% increase in visitors to the county from 2004 - 2016, but tourism is a volatile sector, very difficult to predict and, therefore, retail demand has been kept constant when looking 10 years into the future.

## Town Centre Health Check 2022

Combining the predicted three trends with existing retail capacity and shopping patterns in the County, it was concluded that in:

- Coastal Denbighshire - There is a small oversupply of convenience retail but with the potential population growth over the next 10 years taken into account there is potential for additional retail. An oversupply of comparison retail, based on the current population and the 10-year forecast doesn't foresee a requirement to increase the amount of comparison retail, when all proposed development has taken place; and
- Rural Denbighshire - There was capacity to increase the amount of convenience retail in Rural Denbighshire, however the recent Aldi in Denbigh has covered this demand, and the forecast doesn't predict an increase in demand in the next 10 years. Denbigh and Ruthin are performing below their potential, and over the next 10 years a considerable amount of capacity is available in comparison space, to help better serve the population within the County.

Whilst the retail study did not specifically investigate individual town centres, identifying future demand provides a good indication of what type of retailers, including demand for premises and preferred location, will be interested in Denbighshire so that the Council can prepare corresponding regeneration projects, town centre strategies and local transport concepts.

Since there has been a fundamental change in consumers' behaviour and the overall retail sector for the last two years, the Council is preparing a new town centre assessment that includes retail as a fundamental pillar of future planning for these areas.

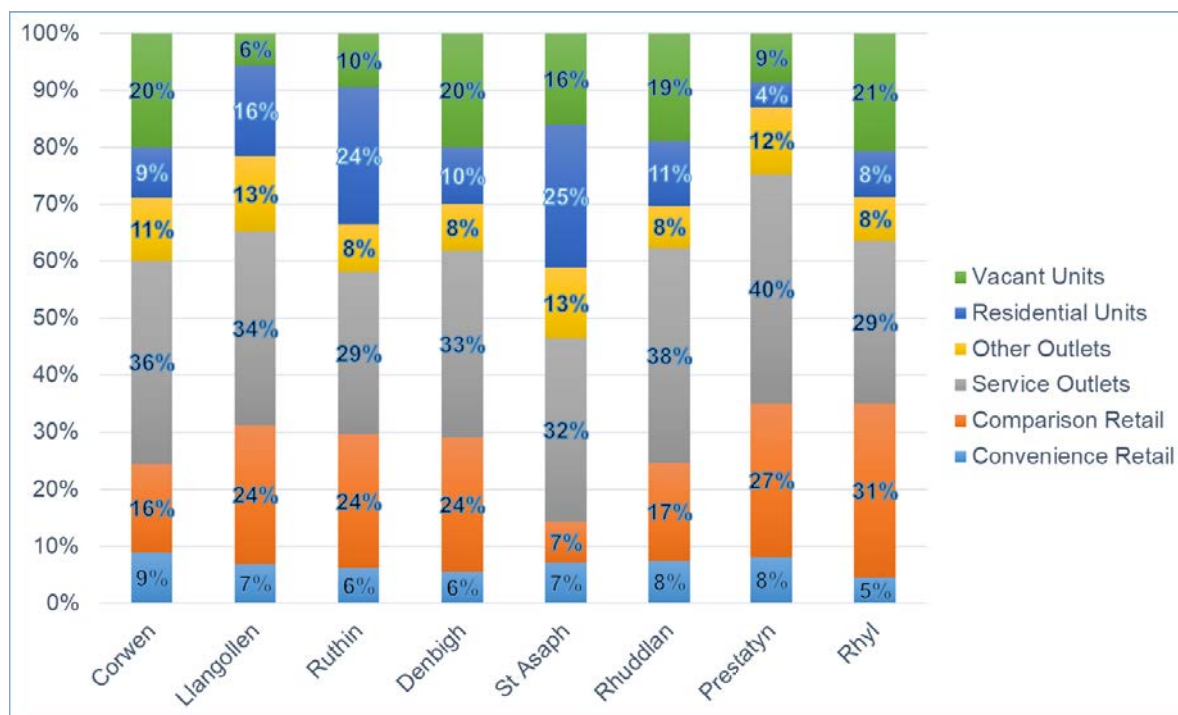
# Town Centre Health Check 2022

## Denbighshire County Council: Annual town centre survey

The Council has been carrying out annual town centre surveys since 2002. Their purpose is to identify how many retail units, service outlets and vacant properties are in each of them; identifying trends and supporting regeneration efforts as well as decisions on planning proposals. It is principally recorded whether the surveyed unit is convenient or comparison retail, a service outlet, in residential use or remains vacant.

Chart 1, see below, shows the percentage of individual town centre uses in relation to the total number of units in the respective town centre as of January 2022. Town centre boundary maps combined with the results from the latest survey can be found in Appendix 2.

Chart 1: Percentage of uses compared to all town centre units in January 2022



Source: Denbighshire County Council (2022)



# **Town Centre Health Check 2022**

## **4. Institute for Place Management: “High Street UK 2020” model**

High Street UK 2020 was concerned with the impact that changes to retailing were having on town and city centres in the United Kingdom of Great Britain and Northern Ireland. The objective was to identify priorities with the greatest impact and over which local organisations have the greatest control in light of decreasing available resources.

Twenty-five priorities were identified by way of using the Delphi-method, which is based on limiting the number of priorities in way of anonymous questionnaires, aggregating responses and reaching consensus among participants from further rounds of consultation. Participants from different professions included town centre managers, retail representatives, council officers and interest groups. The final 25 priorities were subsequently tested in 10 town centres throughout the Country; including Wrexham in North Wales.

# Town Centre Health Check 2022

The list below identifies the 25 priorities. They can assist the Council in decision-making on where to place scarce resources for maximum benefit. Success is however not guaranteed, acknowledging the fact that every town centre is unique in its own challenges.

- Activity hours (opening hours, evening economy)
- Network & partnership with Councils
- Recreational space (open space)
- Appearance (visual, cleanliness)
- Diversity (tenant mix, alternative formats)
- Barriers to entry (retailers to enter the market)
- Retailers (offer, representation)
- Walking (pedestrianisation/ flow, linked trips)
- Chain vs independent
- Vision & strategy (leadership, collaboration)
- Entertainment and leisure
- Safety / crime
- Experience (quality, satisfaction, familiarity)
- Attractiveness
- Liveable (connectivity, multi/ mono functionality)
- Management (centre, place management)
- Place assurance (retail trust, atmosphere)
- Adaptability (flexibility, fragmentation, size)
- Merchandise (quality of goods, assortments)
- Accessibility
- Store development (upgrading, remodelling)
- Necessities (car-parking, amenities, facilities)
- Place marketing
- Comparison/ convenience
- Anchor stores

Source: High Street UK 2020 – Identifying factors that influence vitality and viability

# Town Centre Health Check 2022



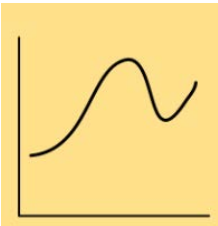

## 5. Institute for Place Management: “Town Centre Signatures” concept

The most widely recognised measure of town centre success (or failure) is the amount of floor space occupied by multiple retailers or the presence of specialist outlets in the centre. However, it is not only retail outlets who re-activate them as chain stores vacate units these can be occupied by services, residential use, or any other ‘pop up’ use. The focus should therefore be on supporting a more multifunctional character of town centres.

Closely aligned to the High Street UK 2020 project, the Institute for Place Management introduced a new way of classifying town centres. This is based on gathering footfall figures, aggregating monthly totals, and producing graphs on an annual basis. Whilst not the only way of classifying town centres, the advantage of the method is the ease of gathering data and producing footfall graphs. Research has led to the identification of four signatures (see table 2): comparison, holiday, speciality, and multifunctional.

# Town Centre Health Check 2022

Table 2: Town centre signatures

Graph	Description
	Comparison shopping centres tend to be larger towns and cities and a key identifier is December being their peak footfall time coinciding with Christmas.
	Holiday towns are busier in the summer months and footfall decreases in the winter.
	Speciality centres seem to be a 'hybrid' between comparison and holiday.
	Multifunctional towns tend to have a flatter profile throughout the year.

Source: Mumford, Parker, Ntounis and Dargan (2017) - A clustering study to verify four distinct monthly footfall signatures: a classification for UK retail centres; Technical Report

## Town Centre Health Check 2022

There are individual centres that can clearly be assigned to one of the classes whilst it can be tricky to match others. This is due to sharing similar characteristics but having unique footfall patterns.

Identified advantages of using the concept are (1) Using the new comparison, holiday, speciality and multifunctional classes in the language of policy and guidelines will speed up the adoption of activity-based performance measures and classifications across the planning profession, urban regeneration sector and local government, and (2) Encouraging locations to measure footfall and establish their signature will lead to more realistic and effective place management and marketing strategies.

Local footfall figures for town centres were analysed and presented in the 2018 Town Centre Health Check. There has not been an assessment of the recorded data using the signature concept between 2017 and 2021 because of partially distorted figures by lockdown restrictions and individual counter failures. Any explanation regarding the assigned town signature is therefore made on the basis of results from the previous health check. Footfall figures are continually recorded, and will hopefully be the basis for future 'signature' assessments.

# Town Centre Health Check 2022

## 6. Denbighshire County Council: Resident survey 2018

Surveys are frequently conducted to receive feedback from residents on local matters, seek views on projects and improve services. It includes questions on community safety, service accessibility and town centre usage. Latest available data is sourced from the year 2018.

In 2018, residents reported experiencing difficulties with accessing shops and commercial services because of issues with transport (29%), broadband (41%) and mobile phone (40%). There is an even higher percentage of residents that have difficulties in accessing local public services because of transport (31%) and broadband (44%).

Satisfaction with the maintenance of streets in towns and villages had seen little or no change from 2011 (61%) and 2013 (62%). In 2015, the reported figure was 54% before a dramatic fall to 45% in 2018. The majority of residents (63%) were satisfied with the overall level of cleanliness of the streets in their local area. This is a reduction from 68% in 2015 and 73% in 2013.

# Town Centre Health Check 2022

## 7. Glossary

(Retail) Comparison goods - Food and non-alcoholic beverages, tobacco, alcoholic beverages, newspapers and periodicals and non-durable household goods.

(Retail) Convenience goods - Clothing, shoes, furniture, household appliances, tools, medical goods, games and toys, books and stationery, jewellery and other personal effects.

## 8. Sources

Denbighshire County Council, 2013. Local Development Plan 2006 – 2021;

Denbighshire County Council, 2018. Retail Study 2018 (Retail Capacity);

Denbighshire County Council, 2018. Resident Survey;

Denbighshire County Council, 2022. Annual Town Centre Survey;

High Street UK 2020, 2017, Project summary. Available at:

[www.placemanagement.org/special-interest-groups/managing-places/town-and-city-centresdowntowns/town-centre-policy-and-research/hsuk2020/](http://www.placemanagement.org/special-interest-groups/managing-places/town-and-city-centresdowntowns/town-centre-policy-and-research/hsuk2020/)

Mumford, Parker, Ntounis and Dargan, 2017. A clustering study to verify four distinct monthly footfall signatures: a classification for UK retail centres Technical Report 1 (Version 5). Available at:

<http://placemanagement.org/media/90636/monthlysignatureclusteringv3.pdf>

Parker, Ntounis, Quin and Millington 2017. High Street UK 2020 Project Report: Identifying factors that influence vitality and viability. Available at:

[www.researchgate.net/publication/298921227](http://www.researchgate.net/publication/298921227)

Welsh Government, 2016. Technical Advice Note 4 'Retail and Commercial Centres';

Welsh Government, 2021. Future Wales - The National Plan 2040;

Welsh Government, 2021. Planning Policy Wales – Edition 11.

# Town Centre Health Check 2022

## Contact

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# **Appendix 1**

**Denbighshire town & city surveys**

# Corwen

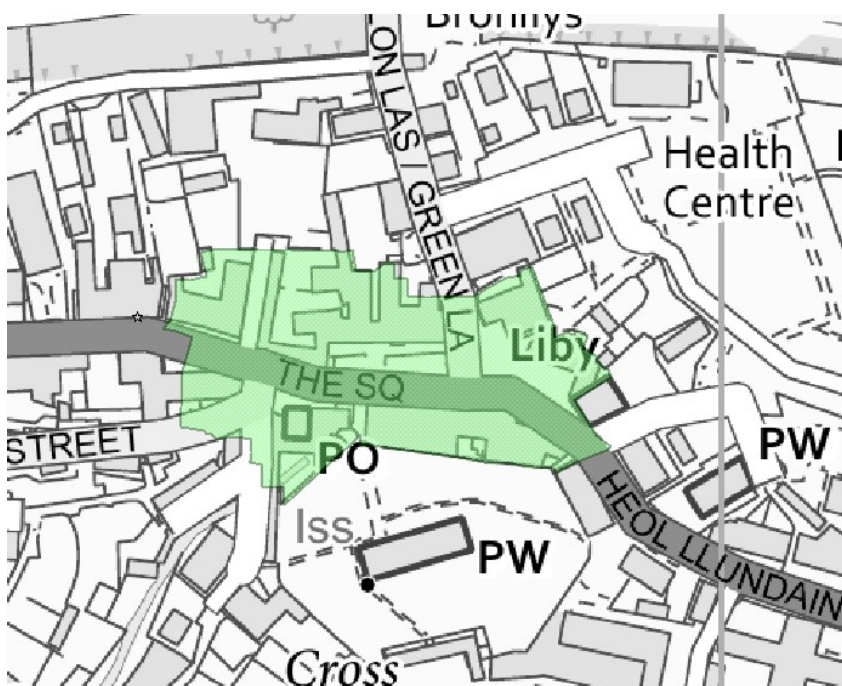


# Denbighshire town & city surveys: Corwen

## Introduction

Corwen is a small town on the southern banks of the river Dee in North Wales. The estimated resident population for the area was 2,354 people on 30th June 2020. The local economy is characterised by tourism, manufacturing and farming.

## Town centre map



## Socio-economic statistics

The median household income is £27,355 in the 'Corwen and Llangollen' local housing market area; compared to £27,498 in Denbighshire;

The number of people aged 3 and above able to speak Welsh was approximately 1,064 in the area in 2011. This equates to 45.7% of the population aged 3 and over.

# Denbighshire town & city surveys: Corwen

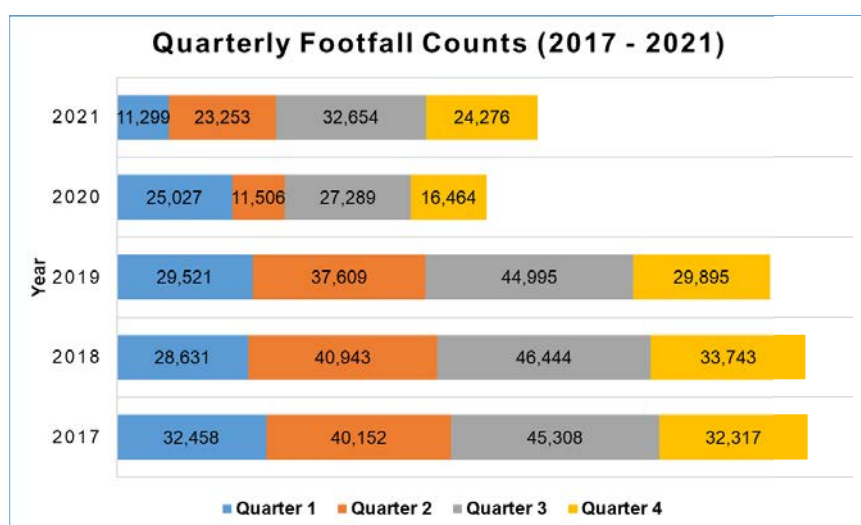
## Town signature and monthly footfall

Signature: Holiday;

What this means: Focus on tourism offer in the area (short and long-term);

Anchor: landscape, historic references to Owain Glyndŵr;

Strategies should be focused on: Attracting visitors without neglecting the need of residents



Source: Denbighshire County Council (2022)

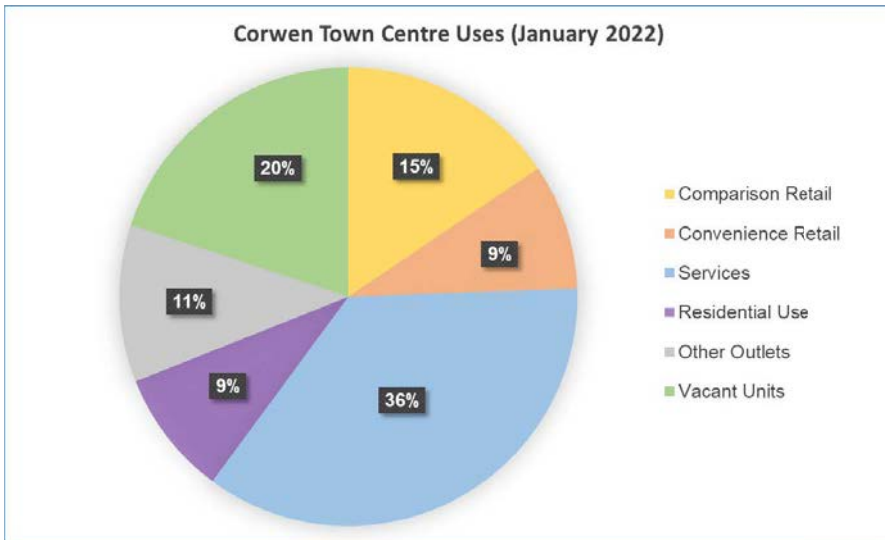
# Denbighshire town & city surveys: Corwen

## Annual town centre survey

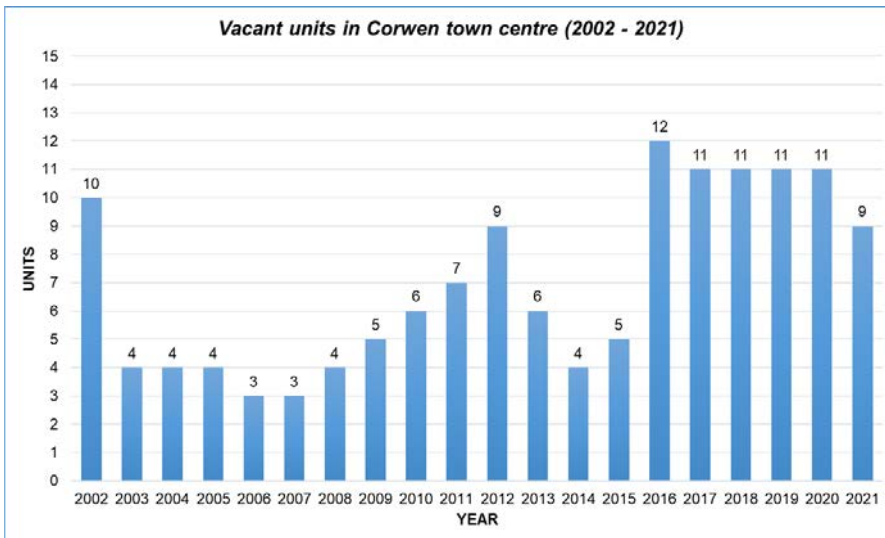
The Council carries out an annual survey of principal town centre uses in Corwen. It was recorded in January 2022 that there were 7 comparison retail units, 4 convenience retail units, 16 service outlets, 4 residential units, 5 other outlets and 9 vacant units. The chart “Corwen Town Centre Uses (January 2022)” shows the same results but in percentages of all units (45 in total). Appendix 2 to the DCC Town Centre Health Check 2022 contains a detailed map for Corwen town centre which also presents the results spatially.

Whilst the number of vacant units has slowly been decreasing since 2016, Corwen town centre has still one of the highest percentages of vacant units in the County; equalling Denbigh and just below Rhyl in the North. See chart “Vacant units in Corwen town centre 2002 – 2021” for details. In terms of retail provision, the number of comparison units outweigh the number of convenience units by 7 to 4.

# Denbighshire town & city surveys: Corwen



Source: Denbighshire County Council (2022)



Source: Denbighshire County Council (2022)

Sales – Number of retail units sold since 2018: 1; Price per square feet (where disclosed): £140.98 (Source: CoStar Group, June 2022);

Leases - Achieved rent per square feet: £13.25; Property on the market: 8 months; Duration of lease: 60 months; Rent free months: 3 (To note: all figures are for Denbighshire and 'Median' calculations; Source: CoStar Group, June 2022)

# Denbighshire town & city surveys: Corwen

## Strengths, weakness, opportunities, threats

SWOT analyses are used to identify the strengths, weaknesses, opportunities, threats in a business or organisation, including spatial components, with the aim to bring about change or growth.

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### Strengths

Range of small shops in town;

Availability of signage and information for tourists;

Free car parking in town centre; and

Heritage railway link with settlements towards Llangollen in the Dee Valley.

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### Weaknesses

Constant level of vacant premises in town centre;

Trunk road (A5) runs through the town centre which causes high levels of noise and air pollution;

Individual buildings would benefit from upgrading/ painting; and

Shortage of accommodation

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### Opportunities

Promote walking opportunities in a high quality environment;

Improve tourism offer for visitors arriving by heritage railway; and

Provision of high quality accommodation in town.

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### Threats

Focus on tourism should not have negative impact on the town centre / retail offer for local people; and

Limited availability of car parking.

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# Denbighshire town & city surveys: Corwen

## What to focus on for Corwen?

Because footfall indicates a 'holiday signature' it is important to focus on serving the visitors to Corwen (without neglecting the needs of local residents) by:

Decrease the number of vacant premises;

Focus on improving dwell time in the town centre by improving the offering of leisure based activities;

Improve the quality and variety of accommodation; and

Increase the number of visitors that arrive at Corwen station.

## Connectivity

Train Station: Yes (heritage line to Llangollen);

Bus Services: Good connectivity with regional and local network;

Link to National Cycle Route Network: In preparation (extension to route no. 85);

Local active travel routes: In preparation

Number of Council car park spaces in town: 178; thereof disabled spaces: 1



# Denbigh





# Denbighshire town & city surveys: Denbigh

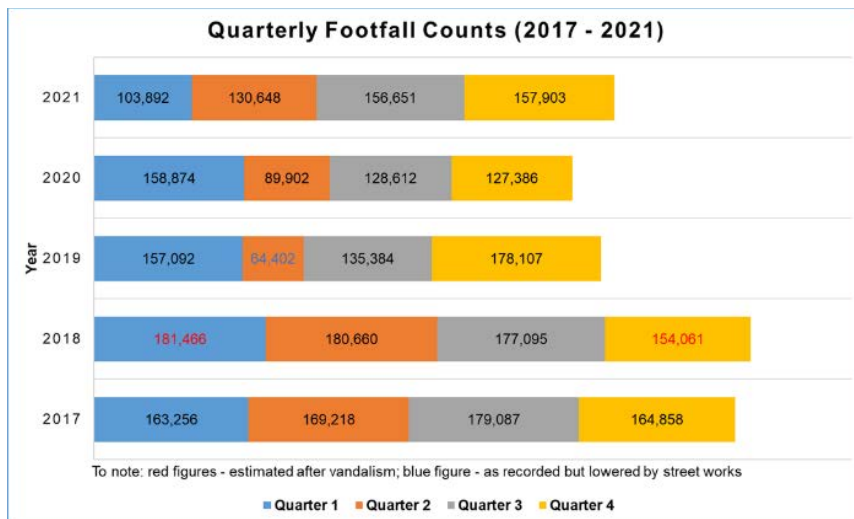
## Town signature and monthly footfall

Signature: Multifunctional;

What this means: Offers convenient mix of retail and services, primarily focussed on local community and surrounding catchment area;

Anchor: Mix of activities, focussing on work, retail, leisure etc.;

Strategies should be focused on: Enabling multi-purpose trips for residents, improving tourist accommodation and promoting high quality built environment.



Source: Denbighshire County Council (2022)

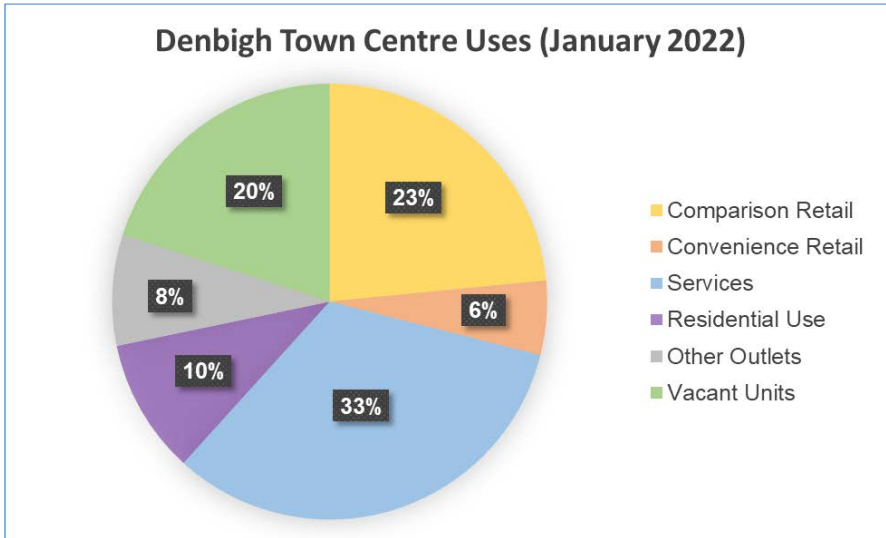
# Denbighshire town & city surveys: Denbigh

## Annual town centre survey

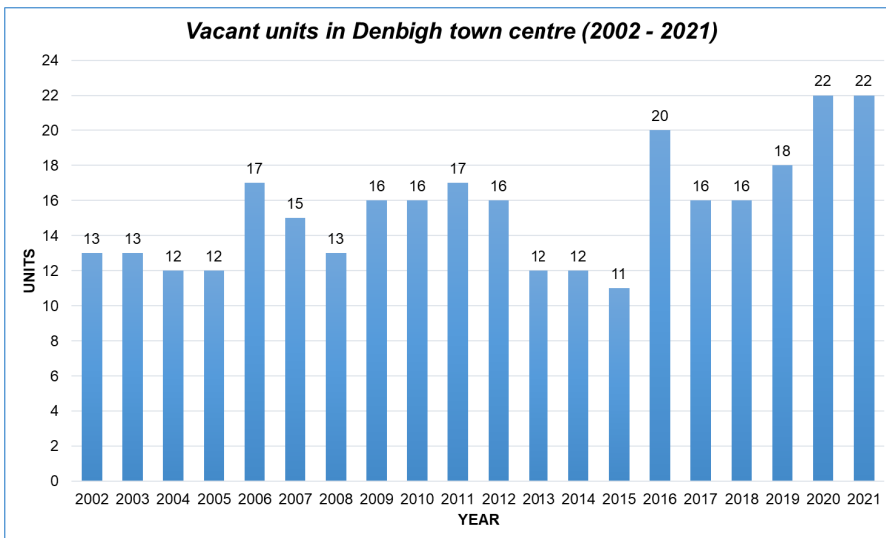
The Council carries out an annual survey of principal town centre uses in Denbigh. It was recorded in January 2022 that there were 26 comparison retail units, 6 convenience retail units, 36 service outlets, 11 residential units, 9 other outlets and 22 vacant units. The chart “Denbigh Town Centre Uses (January 2022)” shows the same results but in percentages of all units (110 in total). Appendix 2 to the DCC Town Centre Health Check 2022 contains a detailed map for Denbigh town centre which also presents the results spatially.

Whilst the number of vacant units has been increasing since 2017, Denbigh town centre has still one of the highest percentages of vacant units in the County; equalling Corwen and just below Rhyl in the North. See chart “Vacant units in Denbigh town centre 2002 – 2021” for details. In terms of retail provision, the number of comparison units outweigh the number of convenience units by 26 to 6.

# Denbighshire town & city surveys: Denbigh



Source: Denbighshire County Council (2022)



Source: Denbighshire County Council (2022)

Sales – Number of retail units sold since 2018: 12; Price per square feet (where disclosed): between £33.91 - £403.42 (Source: CoStar Group, June 2022);

Availability – Advertised rent per annum: between £7,280 - £55,000 depending on size and location; Term: up to 5 years or negotiable (Source: CoStar Group, June 2022);

Leases - Achieved rent per square feet: £13.25; Property on the market: 8 months; Duration of lease: 60 months; Rent free months: 3 (No note: all figures are for Denbighshire and 'Median' calculations; Source: CoStar Group, June 2022)

# Denbighshire town & city surveys: Denbigh

## Strengths, weakness, opportunities, threats

SWOT analyses are used to identify the strengths, weaknesses, opportunities, threats in a business or organisation, including spatial components, with the aim to bring about change or growth.

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### Strengths

Landscape and setting of town;

Historic environment assets such as Denbigh Castle;

Independent retailers;

Compact town centre; and County Council offices in town.

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### Weaknesses

Town centre congestion at peak-times;

Lack of restaurants and accommodation; and

High levels of deprivation in parts of town

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### Opportunities

Improve the convenience goods offer in town centre;

Improve traffic management along

High Street and Vale Street; and Improve signage towards sites of historic merit.

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### Threats

Air and noise pollution adversely affect town centre attractiveness; and

Divergence of customers towards new retail park outside town centre.

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# Denbighshire town & city surveys: Denbigh

## What to focus on for Denbigh?

Serving the local people with an increase in convenience outlets;

Raise visitor experiences for example, improve accommodation offer; and

Improvements to the flow of traffic in the town centre.

## Connectivity

Train Station: No;

Bus Services: Good connectivity with regional and local network;

Link to National Cycle Route Network: No;

Local active travel routes: Yes

Number of Council car park spaces in town: 387; thereof disabled spaces: 1

# Llangollen



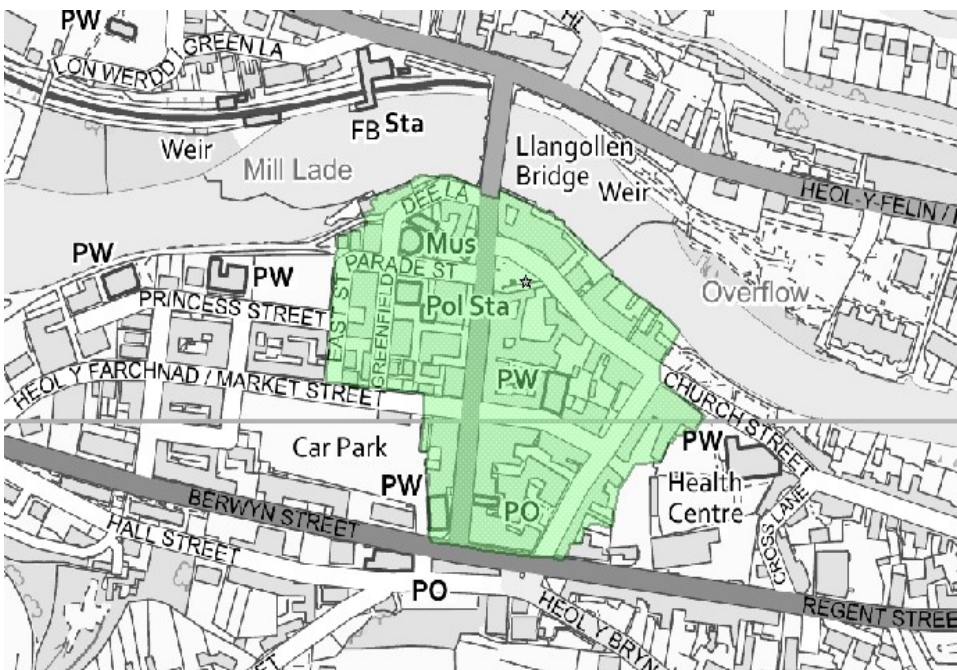


# Denbighshire town & city surveys: Llangollen

## Introduction

Llangollen is a popular town with tourists on the banks of the river Dee. The estimated resident population for the area was 4,164 on 30th June 2020. Llangollen is well known for the annual International Eisteddfod music festival, which takes place in July. Further tourist attractions are the Llangollen to Corwen Heritage Railway and the Pontcysyllte Aqueduct and Canal UNESCO World Heritage Site.

## Town centre map



## Socio-economic statistics

The median household income is £27,355 in the 'Corwen and Llangollen' local housing market area; compared to £27,498 in Denbighshire;

The number of people aged 3 and above able to speak Welsh was approximately 799 in the area in 2011. This equates to 19.5% of the population aged 3 and over.

# Denbighshire town & city surveys: Llangollen

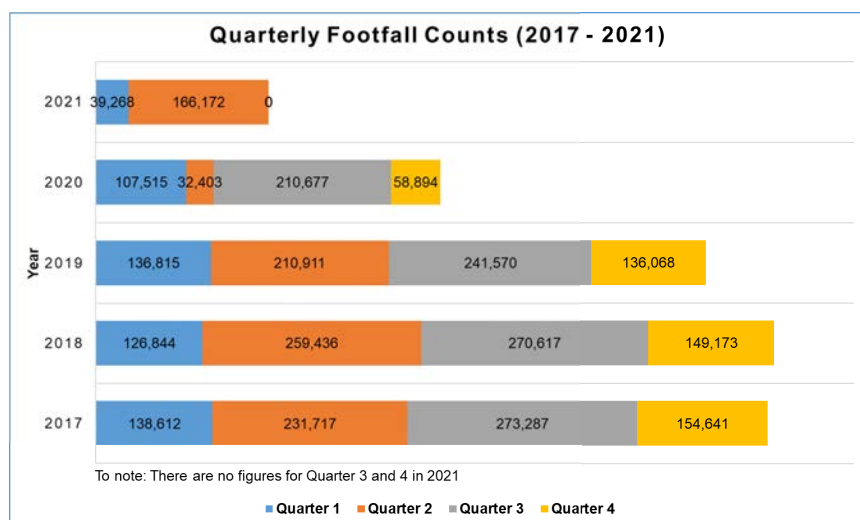
## Town signature and monthly footfall

Signature: Holiday;

What this means: Offers experiences to tourists and day visitors;

Anchor: Natural and historic environment (e. g. Dinas Bran, Llangollen Canal);

Strategies should be focused on: Attracting visitors throughout the year.



Source: Denbighshire County Council (2022)

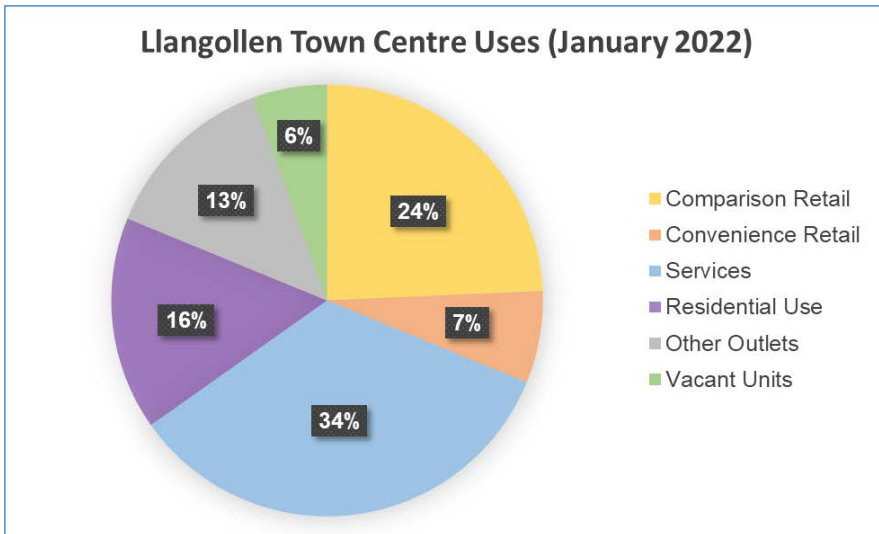
# Denbighshire town & city surveys: Llangollen

## Annual town centre survey

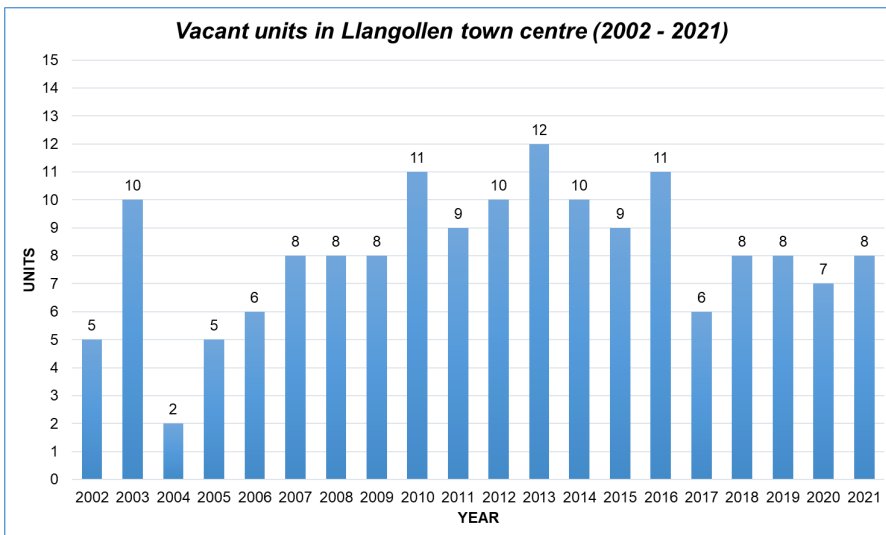
The Council carries out an annual survey of principal town centre uses in Llangollen. It was recorded in January 2022 that there were 35 comparison retail units, 10 convenience retail units, 49 service outlets, 23 residential units, 19 other outlets and 8 vacant units. The chart “Llangollen Town Centre Uses (January 2022)” shows the same results but in percentages of all units (45 in total). Appendix 2 to the DCC Town Centre Health Check 2022 contains a detailed map for Llangollen town centre which also presents the results spatially.

Whilst the number of vacant units has not changed significantly since 2017, Llangollen town centre has the lowest percentage of vacant units in the County. See chart “Vacant units in Llangollen town centre 2002 – 2021” for details. In terms of retail provision, the number of comparison units outweigh the number of convenience units by 35 to 10.

# Denbighshire town & city surveys: Llangollen



Source: Denbighshire County Council (2022)



Source: Denbighshire County Council (2022)

Sales – Number of retail units sold since 2018: 2; Price per square feet (where disclosed): between £226.62 - £351.85 (Source: CoStar Group, June 2022);

Availability – Advertised rent per annum: £6,500; Term: Negotiable (Source: CoStar Group, June 2022);

Leases - Achieved rent per square feet: £13.25; Property on the market: 8 months; Duration of lease: 60 months; Rent free months: 3 (No note: all figures are for Denbighshire and 'Median' calculations; Source: CoStar Group, June 2022)

# Denbighshire town & city surveys: Llangollen

## Strengths, weakness, opportunities, threats

SWOT analyses are used to identify the strengths, weaknesses, opportunities, threats in a business or organisation, including spatial components, with the aim to bring about change or growth.

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### Strengths

Tourist Information Centre in town centre;

Host of the annual International Eisteddfod;

Very few vacant commercial properties in town centre; and

Town setting and surrounding landscape.

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### Weaknesses

Individual shop fronts could benefit from improvement works;

Limited car parking opportunities in and around the town centre; and

Limited amount of quality accommodation

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### Opportunities

Increase tourist numbers in Winter months; and

Improve walking and cycling opportunities for residents and visitors.

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### Threats

Focusing on the needs of tourists may neglect the retail and service provision for local residents in the area.

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# Denbighshire town & city surveys: Llangollen

## What to focus on for Llangollen?

Increase visitor numbers throughout the year, particularly in Winter months;

Individual shop fronts within the town centre would benefit from improvements;

Avoid adverse effects on the natural environment and setting of the town.

## Connectivity

Train Station: Yes (heritage line to Corwen);

Bus Services: Good connectivity with regional and local network;

Link to National Cycle Route Network: Yes (route no. 85);

Local active travel routes: Yes;

Number of Council car park spaces in town: 399; thereof disabled spaces: 19

# Prestatyn



# Denbighshire town & city surveys: Prestatyn

## Introduction

Prestatyn is a seaside town popular with tourists. It is well known for its beaches and family holiday parks. The estimated resident population for the area was 18,419 on 30th June 2020. Prestatyn has quickly become the principal retail centre for Denbighshire with a growing number of high street retail brands re-locating to or in the vicinity of 'Parc Prestatyn'.

## Town centre map



## Socio-economic statistics

The median household income is £26,997 in the 'Prestatyn' local housing market area; compared to £27,498 in Denbighshire;

The number of people aged 3 and above able to speak Welsh was approximately 2,666 in the area in 2011. This equates to 14.5% of the population aged 3 and over.



# Denbighshire town & city surveys: Prestatyn

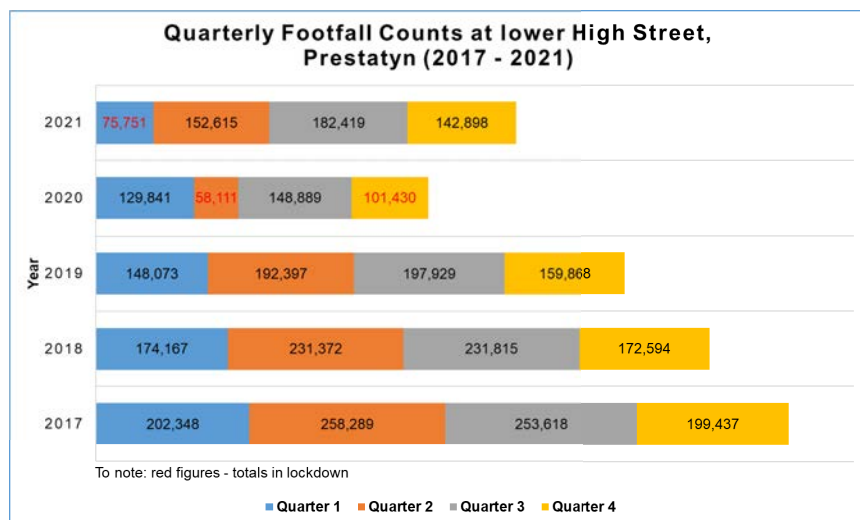
## Town signature and monthly footfall

Signature: Holiday;

What this means: Offers experiences to tourists and day visitors;

Anchor: Seaside / Coast, landscape;

Strategies should be focused on: Attracting visitors throughout the year.



Source: Denbighshire County Council (2022)

# Denbighshire town & city surveys: Prestatyn

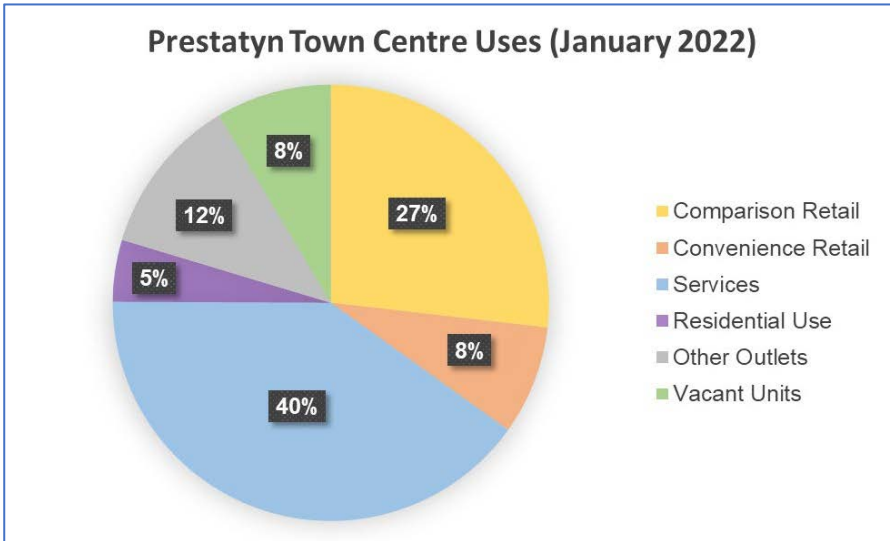
## Annual town centre survey

The Council carries out an annual survey of principal town centre uses in Prestatyn. It was recorded in January 2022 that there were 50 comparison retail units, 15 convenience retail units, 75 service outlets, 8 residential units, 22 other outlets and 16 vacant units.

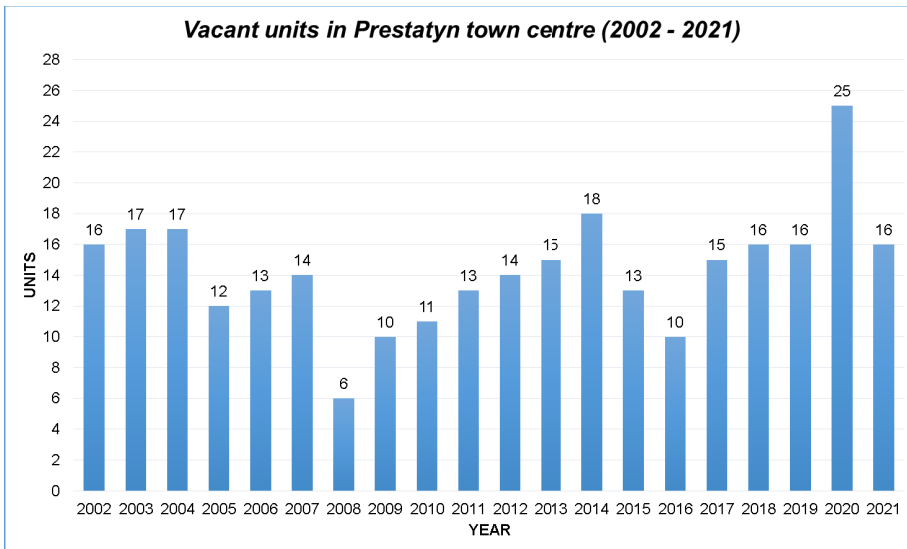
The chart “Prestatyn Town Centre Uses (January 2022)” shows the same results but in percentages of all units (45 in total). Appendix 2 to the DCC Town Centre Health Check 2022 contains a detailed map for Prestatyn town centre which also presents the results spatially.

Whilst the number of vacant units has not changed significantly since 2017, Prestatyn town centre has the second lowest percentage of vacant units in the County. See chart “Vacant units in Prestatyn town centre 2002 – 2021” for details. It’s also the town centre with the lowest percentage of residential units. In terms of retail provision, the number of comparison units outweigh the number of convenience units by 50 to 15.

# Denbighshire town & city surveys: Prestatyn



Source: Denbighshire County Council (2022)



Source: Denbighshire County Council (2022)

Sales – Number of retail units sold since 2018: 8; Price per square feet (where disclosed): between £57.85 - £414.06 (Source: CoStar Group, June 2022);

Availability – Advertised rent per annum: £9,000; Term: up to 5 years (Source: CoStar Group, June 2022);

Leases - Achieved rent per square feet: £13.25; Property on the market: 8 months; Duration of lease: 60 months; Rent free months: 3 (No note: all figures are for Denbighshire and 'Median' calculations; Source: CoStar Group, June 2022)

# Denbighshire town & city surveys: Prestatyn

## Strengths, weakness, opportunities, threats

SWOT analyses are used to identify the strengths, weaknesses, opportunities, threats in a business or organisation, including spatial components, with the aim to bring about change or growth.

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### Strengths

Variety of independent retailers and business on the high street;

Well established retail park in town;

Variety of local facilities such as cinema and green gardens;

Natural surroundings: beach, Clwydian Hills; and

Popular tourist destination

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### Weaknesses

Shortage of varied accommodation, dominance of caravan parks.

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### Opportunities

Focus on increasing different types of accommodation in town centre; and

Adding new attractions to town centre that cater for all-ages.

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### Threats

Competition from other seaside towns along the North Wales coast.

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# Denbighshire town & city surveys: Prestatyn

## What to focus on for Prestatyn?

Widen the tourism offer to cater to a younger demographic; and

Promotion of seaside and natural environment.

## Connectivity

Train Station: Yes;

Bus Services: Good connectivity with regional and local network;

Link to National Cycle Route Network: Yes (route no. 5);

Local active travel routes: Yes;

Number of Council car park spaces in town: 1,383; thereof disabled spaces: 40

# Rhuddlan

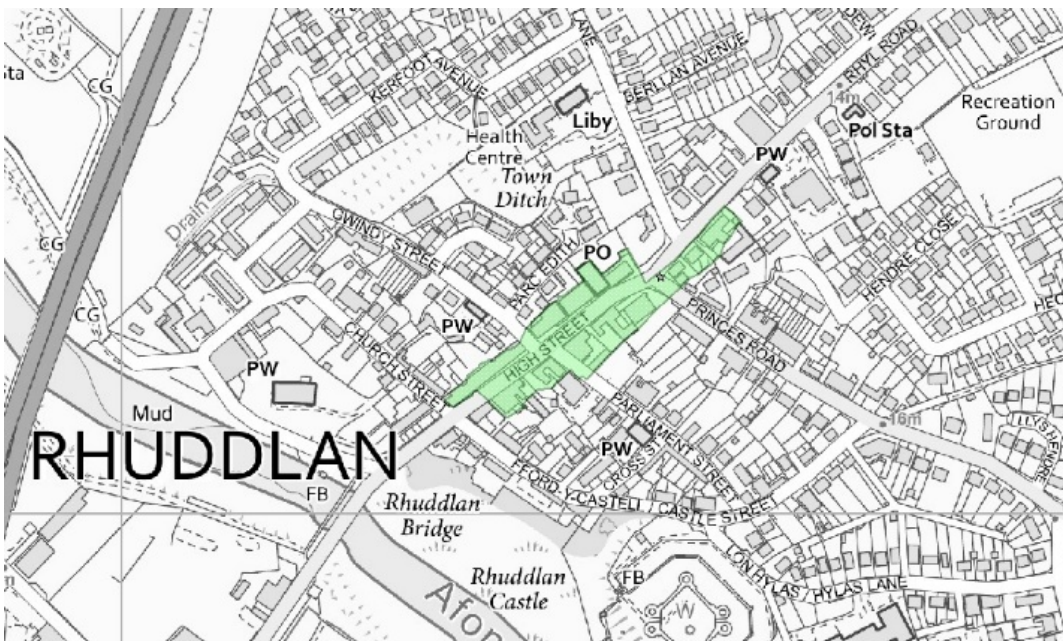


# Denbighshire town & city surveys: Rhuddlan

## Introduction

Rhuddlan is a small town overlooking the river Clwyd in the north of Denbighshire. The estimated resident population for the area was 4,205 on 30th June 2020. It is known for its Castle ruins, which were built by King Edward I in the 1200's. Prior to that it was a government seat and the Capital of Gwynedd. A small high street serves the local population well, with a variety of independent shops, services and pubs.

## Town centre map



## Socio-economic statistics

The median household income is £24,548 in the 'Rhyl and Coast' local housing market area; compared to £27,498 in Denbighshire;

The number of people aged 3 and above able to speak Welsh was approximately 804 in the area in 2011. This equates to 18.8% of the population aged 3 and over.

# Denbighshire town & city surveys: Rhuddlan

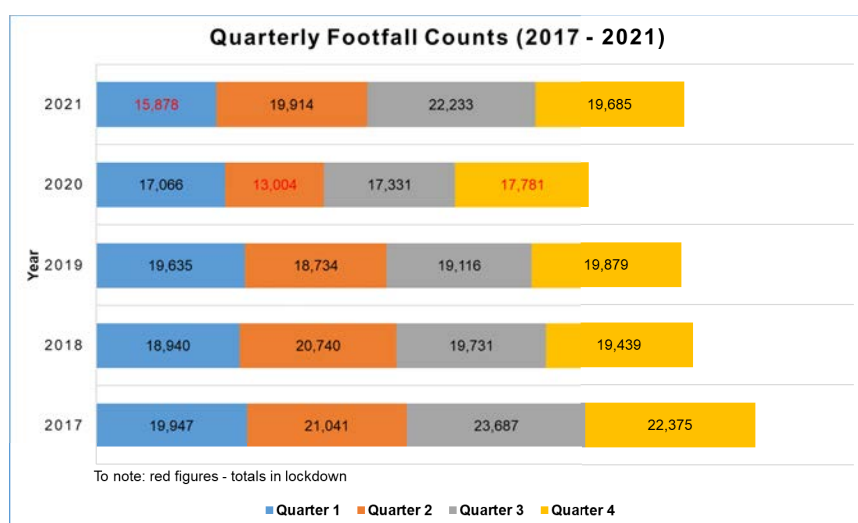
## Town signature and monthly footfall

Signature: Multifunctional;

What this means: Offers convenient mix of retail and services;

Anchor: Provision of retail needs for local residents.;

Strategies should be focused on: Attracting visitors throughout the year and town accessibility.



Source: Denbighshire County Council (2022)



# Denbighshire town & city surveys: Rhuddlan

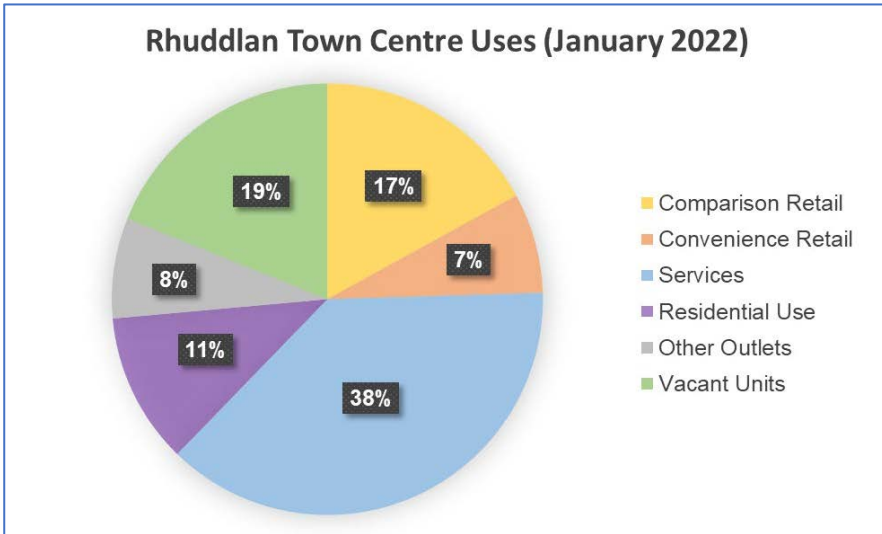
## Annual town centre survey

The Council carries out an annual survey of principal town centre uses in Rhuddlan. It was recorded in January 2022 that there were 9 comparison retail units, 4 convenience retail units, 20 service outlets, 6 residential units, 4 other outlets and 10 vacant units.

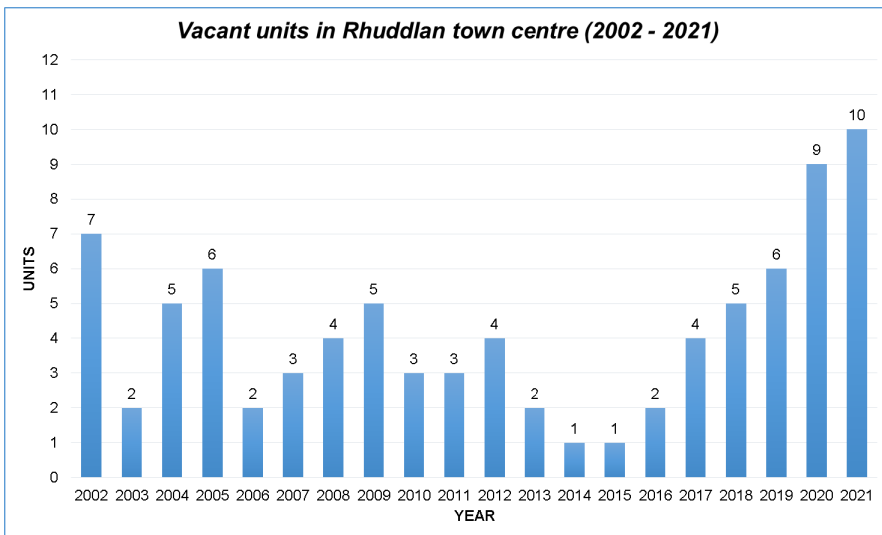
The chart “Rhuddlan Town Centre Uses (January 2022)” shows the same results but in percentages of all units (53 in total). Appendix 2 to the DCC Town Centre Health Check 2022 contains a detailed map for Rhuddlan town centre which also presents the results spatially.

It is noted that the number of vacant units within the town centre has steadily risen since 2015 from 1 to 10 units. See chart “Vacant units in Rhuddlan town centre 2002 – 2021” for details. In terms of retail provision, the number of comparison units outweigh the number of convenience units by more than 2 to 1.

# Denbighshire town & city surveys: Rhuddlan



Source: Denbighshire County Council (2022)



Source: Denbighshire County Council (2022)

Leases - Achieved rent per square feet: £13.25; Property on the market: 8 months;  
 Duration of lease: 60 months; Rent free months: 3 (No note: all figures are for  
 Denbighshire and 'Median' calculations; Source: CoStar Group, June 2022)

# Denbighshire town & city surveys: Rhuddlan

## Strengths, weakness, opportunities, threats

SWOT analyses are used to identify the strengths, weaknesses, opportunities, threats in a business or organisation, including spatial components, with the aim to bring about change or growth.

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### Strengths

Variety of independent retailers and business on the high street;

Town appearance is tidy and well-maintained; and

Rhuddlan Castle is popular with tourists

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### Weaknesses

Traffic congestion;

Bridge traffic flow restriction; and

High percentage of vacant units.

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### Opportunities

Increase the number of tourists by improving walking and cycling network; and

Improve link between Castle, 'Rhuddlan Triangle' and town centre.

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### Threats

In close proximity to principal shopping centres in Denbighshire; and

Limited parking availability that could deter interested parties.

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# Denbighshire town & city surveys: Rhuddlan

## What to focus on for Rhuddlan?

Continue to serve local residents with a varied, independent high street, and good links to nearby towns and retail parks;

Maintain a low vacancy rate on the High Street; and

Raise awareness of local attractions to increase visitor numbers

## Connectivity

Train Station: No;

Bus Services: Good connectivity with regional and local network;

Link to National Cycle Route Network: Yes (route no. 84);

Local active travel routes: Yes;

Number of Council car park spaces in town: 55; thereof disabled spaces: 30

# Rhyl



# Denbighshire town & city surveys: Rhyl

## Introduction

Rhyl is a seaside resort on the North East coast of Wales and lies to the east of the river Clwyd. The majority of the town centre is in a designated Conservation Area. The estimated resident population for the area was 26,277 on 30th June 2020. The town has many ongoing regeneration projects, including various works along the promenade.

## Town centre map



## Socio-economic statistics

The median household income is £24,548 in the 'Rhyl and Coast' local housing market area; compared to £27,498 in Denbighshire;

The number of people aged 3 and above able to speak Welsh was approximately 3,343 in the area in 2011. This equates to 13.5% of the population aged 3 and over.

# Denbighshire town & city surveys: Rhyl

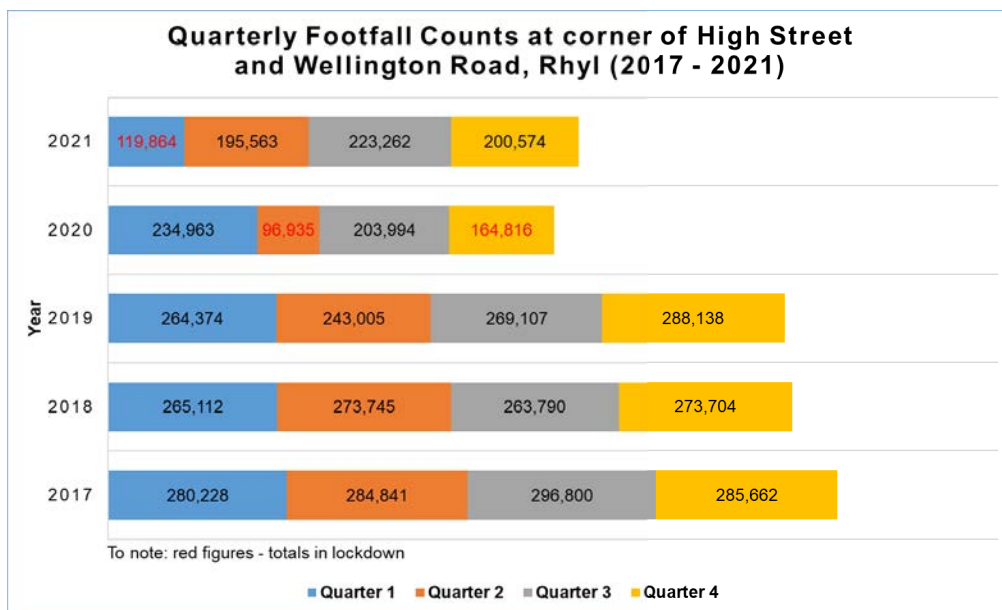
## Town signature and monthly footfall

Signature: 'Speciality' - town is regarded as major seaside destination;

What this means: Serves local residents and visitors, town centre offers dwell time;

Anchor: Provision of retail needs for local residents and seaside tourists;

Strategies should be focused on: Protecting and promoting identity of town to develop resilience in competition with other seaside resorts in North Wales.



Source: Denbighshire County Council 2022

# Denbighshire town & city surveys: Rhyl

## Annual Town Centre Survey

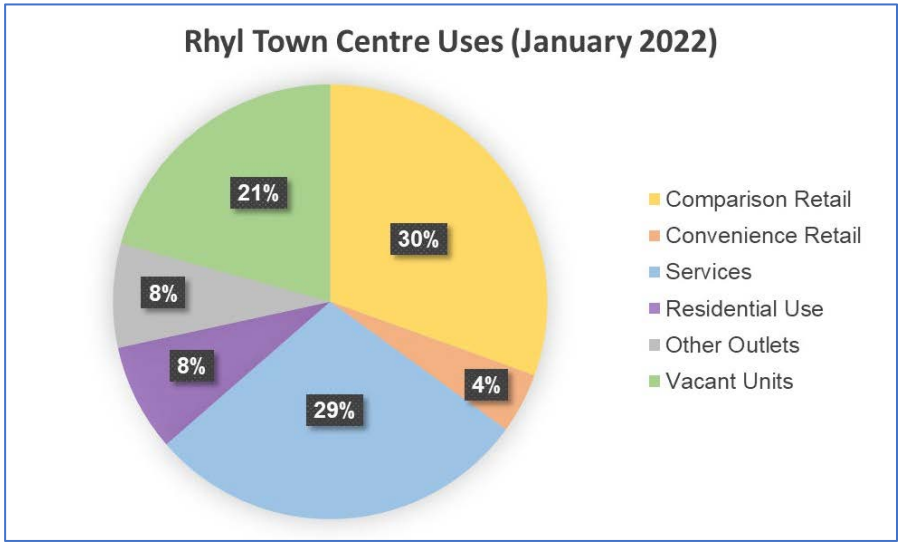
The Council carries out an annual survey of principal town centre uses in Rhyl. It was recorded in January 2022 that there were 115 comparison retail units, 17 convenience retail units, 108 service outlets, 30 residential units, 29 other outlets and 78 vacant units.

The chart “Rhyl Town Centre Uses (January 2022)” shows the same results but in percentages of all units (377 in total). Appendix 2 to the DCC Town Centre Health Check 2022 contains a detailed map for Rhyl town centre which also presents the results spatially.

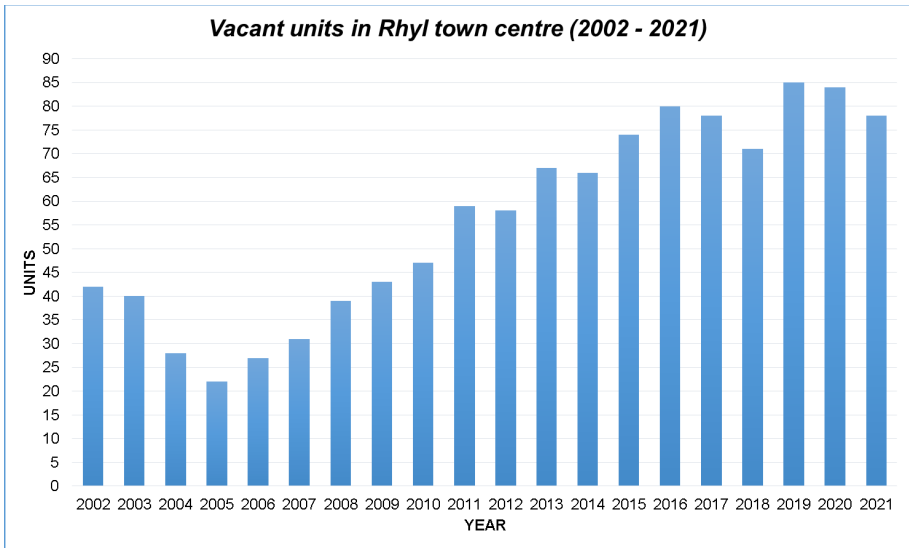
The number of vacant units has been consistently higher than the County-average since 2013. See chart “Vacant units in Rhyl town centre 2002 - 2021” for details. In terms of retail provision, the number of comparison units outweigh the number of convenience units by 115 to 17.



# Denbighshire town & city surveys: Rhyl



Source: Denbighshire County Council (2022)



Source: Denbighshire County Council (2022)

Sales – Number of retail units sold since 2018: 27; Price per square feet (where disclosed): between £35.71 - £416.67 (Source: CoStar Group, June 2022);

Availability – Advertised rent per annum: between £4,000 - £50,000 depending on size and location; Term: up to 5 years or negotiable (Source: CoStar Group, June 2022);

Leases - Achieved rent per square feet: £13.25; Property on the market: 8 months; Duration of lease: 60 months; Rent free months: 3 (No note: all figures are for Denbighshire and 'Median' calculations; Source: CoStar Group, June 2022)

# Denbighshire town & city surveys: Rhyl

## Strengths, Weakness, Opportunities, Threats

SWOT analyses are used to identify the strengths, weaknesses, opportunities, threats in a business or organisation, including spatial components, with the aim to bring about change or growth.

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### Strengths

Conservation Area provides legal protection to built environment and heritage,

Natural environment: seaside with harbour;

Variety of regeneration strategies; and good location and transport links.

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### Weaknesses

Shop frontages in the town centre are ill fitting with the building, often not respecting the conservation area;

Lack of green and open space in town centre; and high amount of vacant units.

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### Opportunities

Use the momentum from regeneration within the master plan to stimulate other activities;

Find a unique identity for Rhyl to turn it back into the popular tourist destination it once was;

Protect the built and natural environment; and involve the local population in much of the regeneration efforts to encourage ownership.

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### Threats

Delivery of The Rhyl Vision plan loses momentum and projects are left unfinished;

Appearance of the high street puts off potential investors in much needed housing development; and

Close proximity to other popular tourist places.

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# Denbighshire town & city surveys: Rhyl

## What to focus on for Rhyl?

Finding a unique identity and positioning for Rhyl;

Improve the appearance of the Town and Town Centre;

Improve connections between the Town Centre and the beach; and

Work with and support local population in regeneration activities.

## Connectivity

Train Station: Yes;

Bus Services: Good connectivity with regional and local network;

Link to National Cycle Route Network: Yes (route no. 5);

Local active travel routes: Yes;

Number of Council car park spaces in town: 1,719; thereof disabled spaces: 81.

# Ruthin

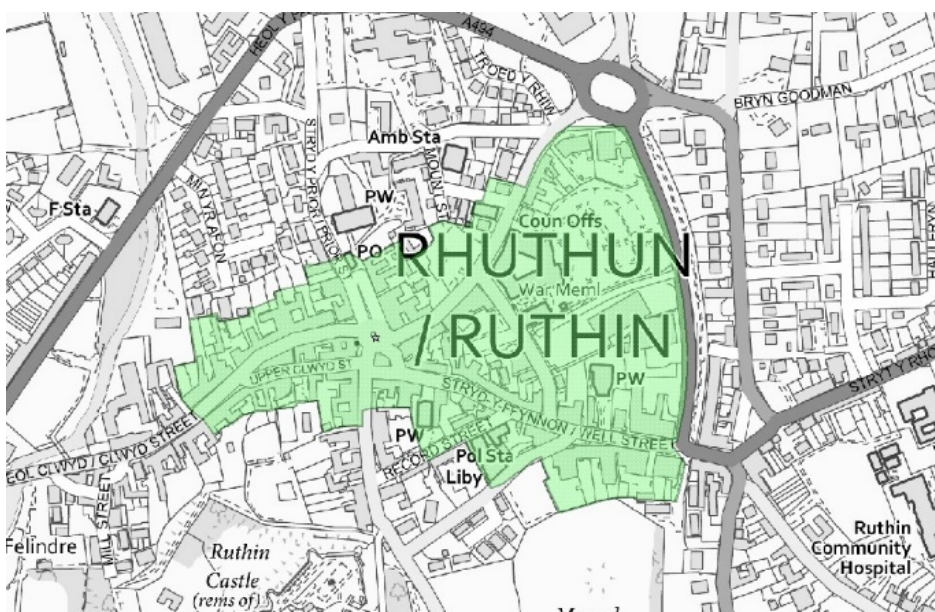


# Denbighshire town & city surveys: Ruthin

## Introduction

Ruthin is the County Town of Denbighshire, and has a 13th Century Castle, an old Gaol which is now a museum and a range of other attractions; including gardens and a craft centre. The estimated resident population for the area was 5,682 on 30th June 2020. The town centre is filled with independent businesses and is one of the most prosperous towns in the County.

## Town centre map



## Socio-economic statistics

The median household income is £32,059 in the 'Ruthin and East' local housing market area; compared to £27,498 in Denbighshire;

The number of people aged 3 and above able to speak Welsh was approximately 2,195 in the area in 2011. This equates to 40.1% of the population aged 3 and over.

# Denbighshire town & city surveys: Ruthin

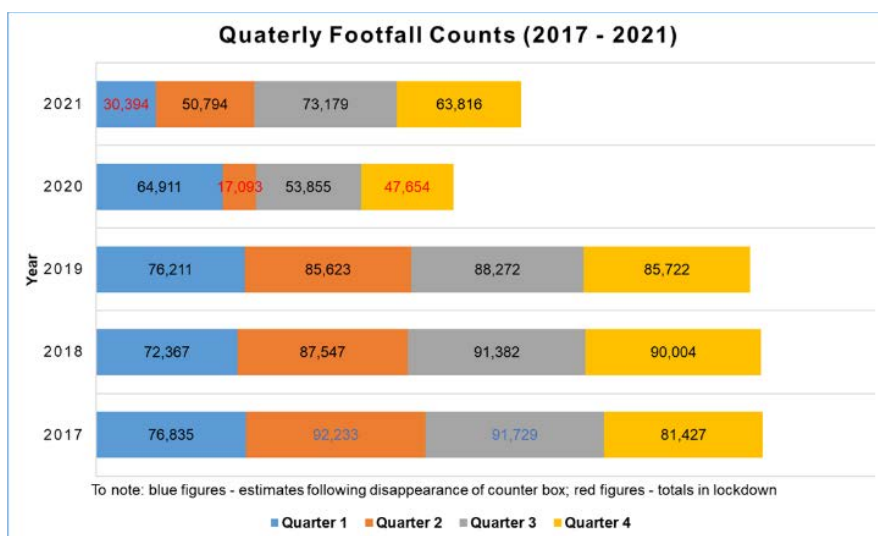
## Town Signature and Monthly Footfall

Signature: Multifunctional;

What this means: Offers convenient mix of retail, services and events;

Anchor: Ordinary everyday anchors (work, transport, etc.);

Strategies should be focused on: Improving access, connectivity and widening diversity of linked trips.



Source: Denbighshire County Council (2022)

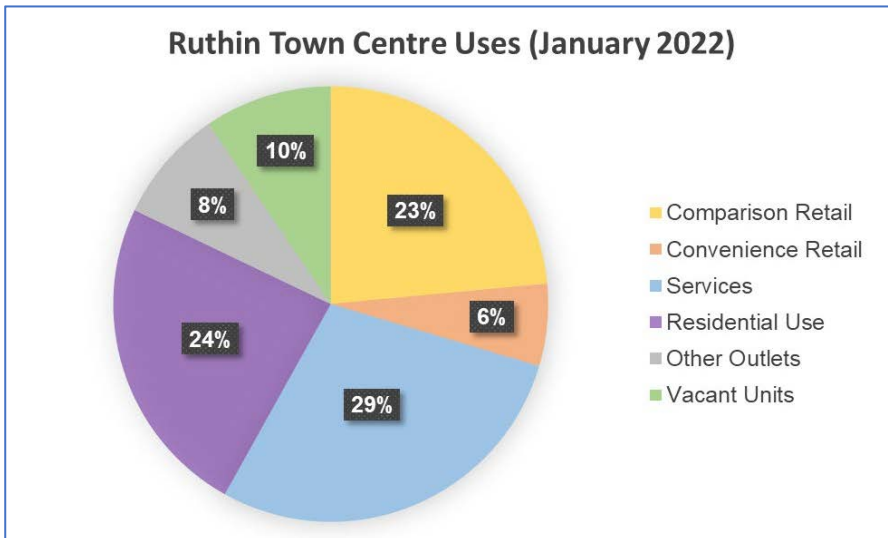
# Denbighshire town & city surveys: Ruthin

## Annual Town Centre Survey

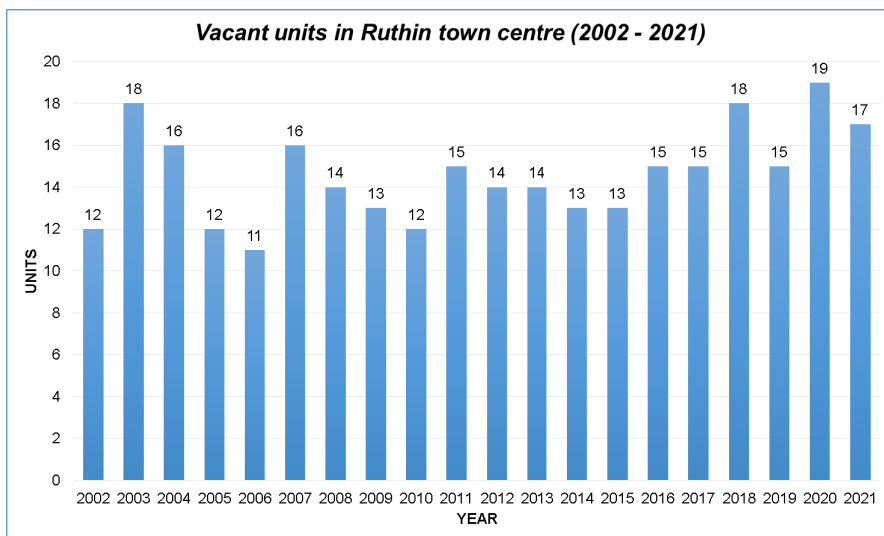
The Council carries out an annual survey of principal town centre uses in Ruthin. It was recorded in January 2022 that there were 42 comparison retail units, 11 convenience retail units, 51 service outlets, 43 residential units, 15 other outlets and 17 vacant units. The chart “Ruthin Town Centre Uses (January 2022)” shows the same results but in percentages of all units (179 in total). Appendix 2 to the DCC Town Centre Health Check 2022 contains a detailed map for Ruthin town centre which also presents the results spatially.

Whilst the number of vacant units has been comparatively constant since 2016, Ruthin town centre has the second highest percentage of residential units. See chart “Vacant units in Ruthin town centre 2002 – 2021” for details. In terms of retail provision, the number of comparison units outweigh the number of convenience units by 43 to 15.

# Denbighshire town & city surveys: Ruthin



Source: Denbighshire County Council (2022)



Source: Denbighshire County Council (2022)

Sales – Number of retail units sold since 2018: 4; Price per square feet (where disclosed): between £50.05 - £534.65 (Source: CoStar Group, June 2022);

Availability – Advertised rent per annum: £7,500; Term: up to 5 years (Source: CoStar Group, June 2022);

Leases - Achieved rent per square feet: £13.25; Property on the market: 8 months; Duration of lease: 60 months; Rent free months: 3 (No note: all figures are for Denbighshire and 'Median' calculations; Source: CoStar Group, June 2022)



# Denbighshire town & city surveys: Ruthin

## Strengths, Weakness, Opportunities, Threats

SWOT analyses are used to identify the strengths, weaknesses, opportunities, threats in a business or organisation, including spatial components, with the aim to bring about change or growth.

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### Strengths

Principal Council Offices are located within the town which increases footfall in addition to residents and visiting tourists.

A prosperous town in Denbighshire;

Good variety of shops/independent traders;

Built environment;

Easy to navigate town centre; and

Setting and Landscape; and in close proximity to Area of Outstanding Natural Beauty (AONB).

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### Weaknesses

Footfall decreases during summer months

Low percentage of convenience outlets

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### Opportunities

To increase the amount of visitors during the summer months;

To provide more convenience outlets for local population; and

To work together with other areas of the AONB to protect and promote it.

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### Threats

Natural environment being spoilt if visitors increase; and

Competition from other town centres with a better offer of convenience goods.

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# Denbighshire town & city surveys: Ruthin

## What to focus on for Ruthin?

Continuing to improve convenience, accessibility and connectivity for local population;

Conservation and enhancement of built and natural environment; and

Attracting more visitors throughout the seasons.

## Connectivity

Train Station: No;

Bus Services: Good connectivity with regional and local network;

Link to National Cycle Route Network: No;

Local active travel routes: Yes;

Number of Council car park spaces in town: 407; thereof disabled spaces: 20

# St Asaph

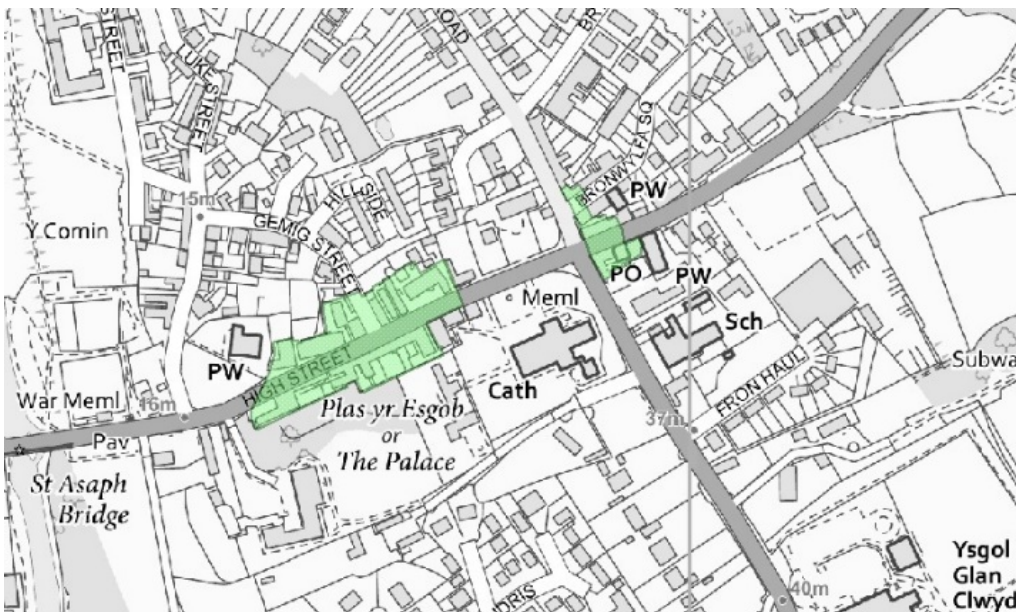


# Denbighshire town & city surveys: St Asaph

## Introduction

St Asaph is the second smallest city in the UK. The estimated resident population for the area was 3,470 on 30th June 2020. The past few decades have seen the small city thrive, with the opening of the A55 in the 1970s and more recently the Business Park being built which has seen national and international investment. It is a small high street, with a number of vacant properties and can feel highly congested with road traffic.

## City centre map



## Socio-economic statistics

The median household income is £31,247 in the 'Bodelwyddan and Borders' local housing market area; compared to £27,498 in Denbighshire;

The number of people aged 3 and above able to speak Welsh was approximately 745 in the area in 2011. This equates to 22.2% of the population aged 3 and over.

# Denbighshire town & city surveys: St Asaph

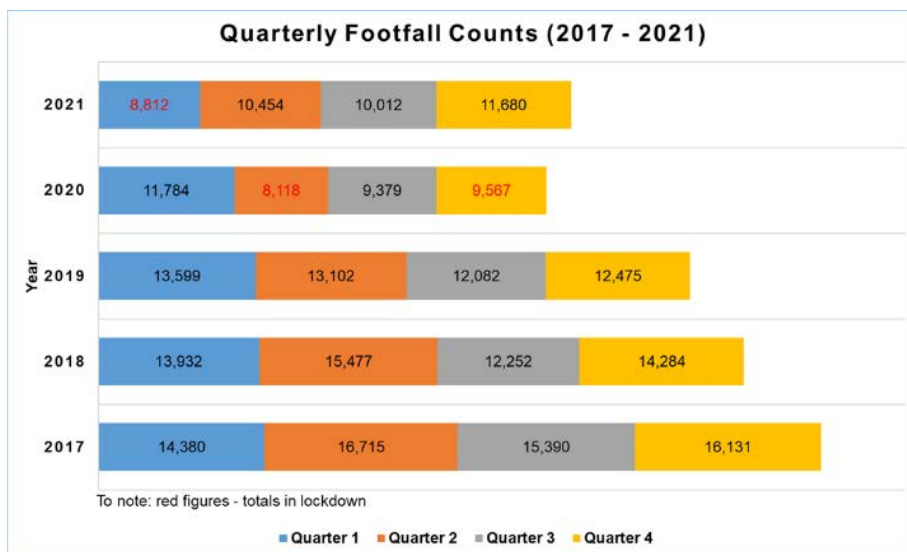
## Town Signature and Monthly Footfall

Signature: Multifunctional;

What this means: Offers something unique and special, for example St Asaph Cathedral;

Anchor: Ordinary everyday anchors (work, transport, etc.);

Strategies should be focused on: Protecting and promoting identity with a focus on improving accessibility and connectivity.



Source: Denbighshire County Council (2022)

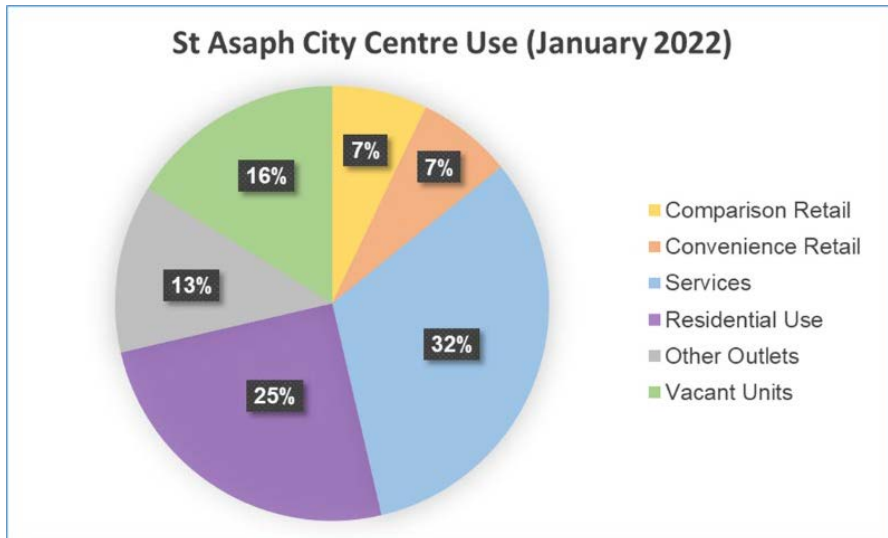
# Denbighshire town & city surveys: St Asaph

## Annual Town Centre Survey

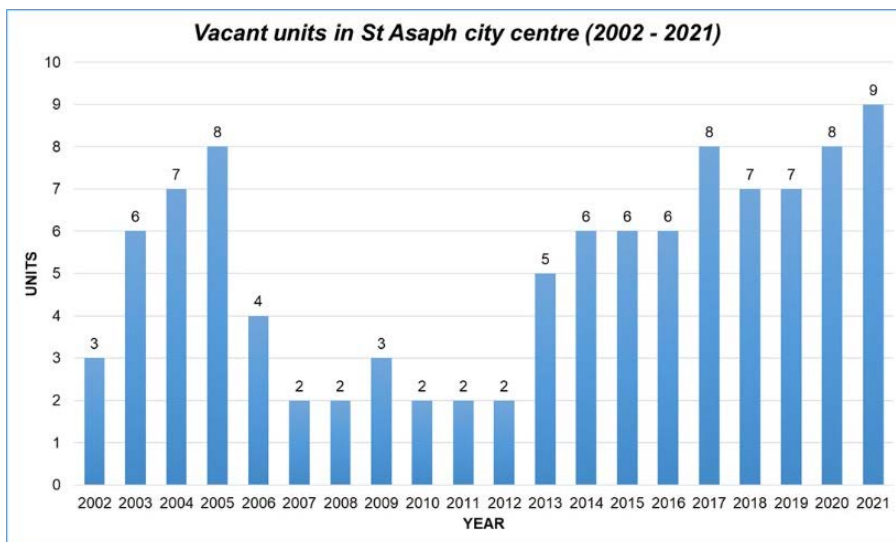
The Council carries out an annual survey of principal city centre uses in St Asaph. It was recorded in January 2022 that there were 4 comparison retail units, 4 convenience retail units, 18 service outlets, 14 residential units, 7 other outlets and 9 vacant units. The chart “St Asaph City Centre Uses (January 2022)” shows the same results but in percentages of all units (56 in total). Appendix 2 to the DCC Town Centre Health Check 2022 contains a detailed map for St Asaph centre which also presents the results spatially.

Whilst the number of vacant units has slowly increased since 2016, St Asaph has the highest percentage of residential units. See chart “Vacant units in St Asaph city centre 2002 – 2021” for details. In terms of retail provision, the number of comparison units equals the number of convenience units.

# Denbighshire town & city surveys: St Asaph



Source: Denbighshire County Council (2022)



Source: Denbighshire County Council (2022)

Sales – Number of retail units sold since 2018: 2; Price per square feet (where disclosed): between £181.41 (Source: CoStar Group, June 2022);

Availability – Advertised rent per annum: £12,100; Term: 5 years (Source: CoStar Group, June 2022);

Leases - Achieved rent per square feet: £13.25; Property on the market: 8 months; Duration of lease: 60 months; Rent free months: 3 (No note: all figures are for Denbighshire and 'Median' calculations; Source: CoStar Group, June 2022)

# Denbighshire town & city surveys: St Asaph

## Strengths, Weakness, Opportunities, Threats

SWOT analyses are used to identify the strengths, weaknesses, opportunities, threats in a business or organisation, including spatial components, with the aim to bring about change or growth.

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### Strengths

Excellent connectivity along the North Wales Coast via A55 trunk road;

Small High Street; and

Historic environment: St Asaph Cathedral.

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### Weaknesses

Can feel traffic dominant, with large HGVs passing through narrow roads; and

High percentage of vacant units.

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### Opportunities

Fill vacant units with much needed retail;

Make the town feel more pedestrianised and accessible; and

Increase footfall in peak months.

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### Threats

Size of town cannot accommodate much more development;

Can be regarded as a place to 'pass through'; and

Competition with 'Tweedmill' shopping centre outside the city in terms of retail.

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# Denbighshire town & city surveys: St Asaph

## What to focus on for St Asaph?

Protect and promote 'small city' identity to attract more visitors;

Improve accessibility for residents; and

Make the high street more pedestrian focused.

## Connectivity

Train Station: No;

Bus Services: Good connectivity with regional and local network;

Link to National Cycle Route Network: Yes (route no. 84);

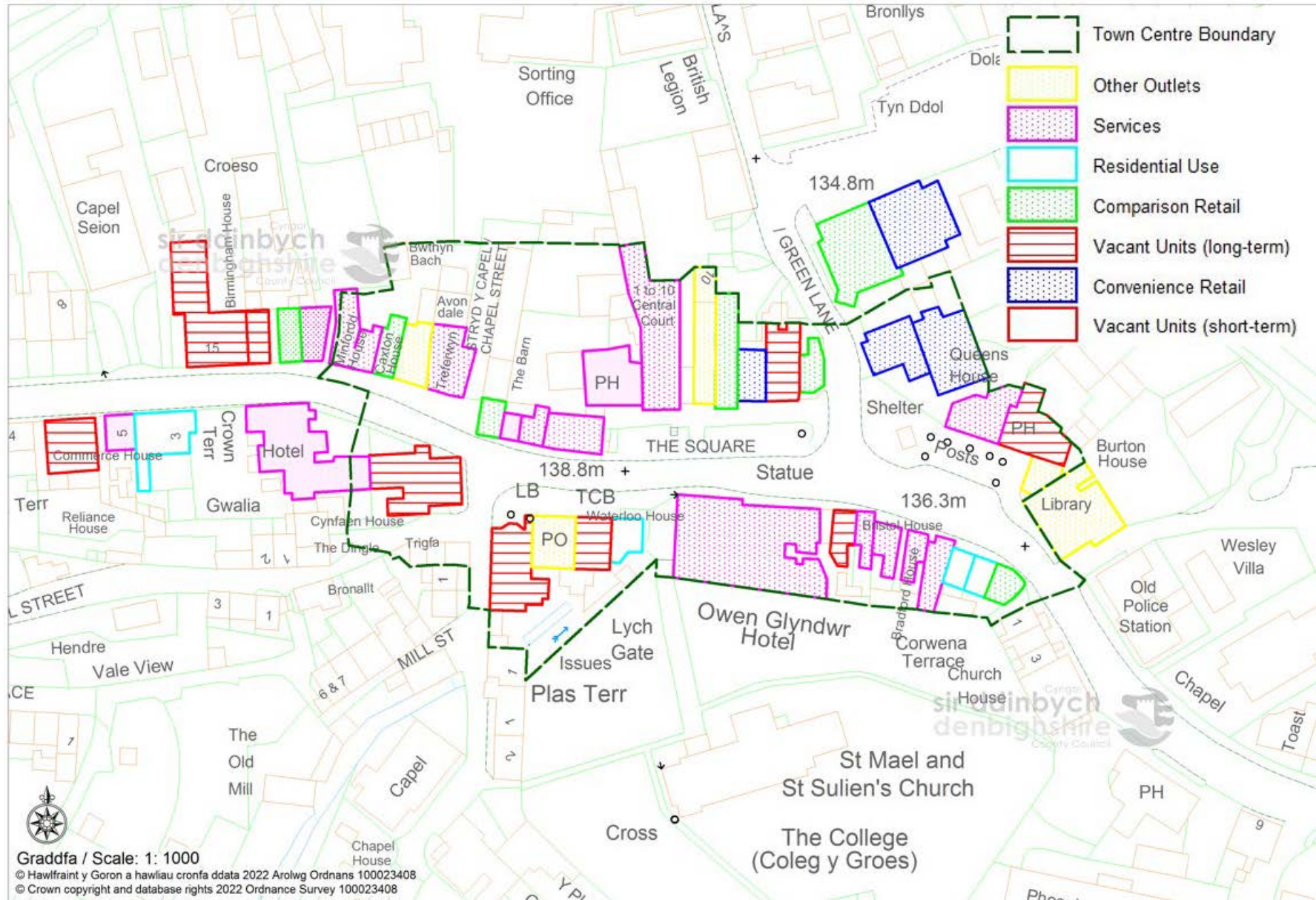
Local active travel routes: Yes;

Number of Council car park spaces in town: 26; thereof disabled spaces: 1

# Appendix 2

Set of maps that show the results of the annual Denbighshire town and city centre survey for Corwen, Denbigh, Llangollen, Prestatyn, Rhuddlan, Rhyl, Ruthin and St Asaph in January 2022.

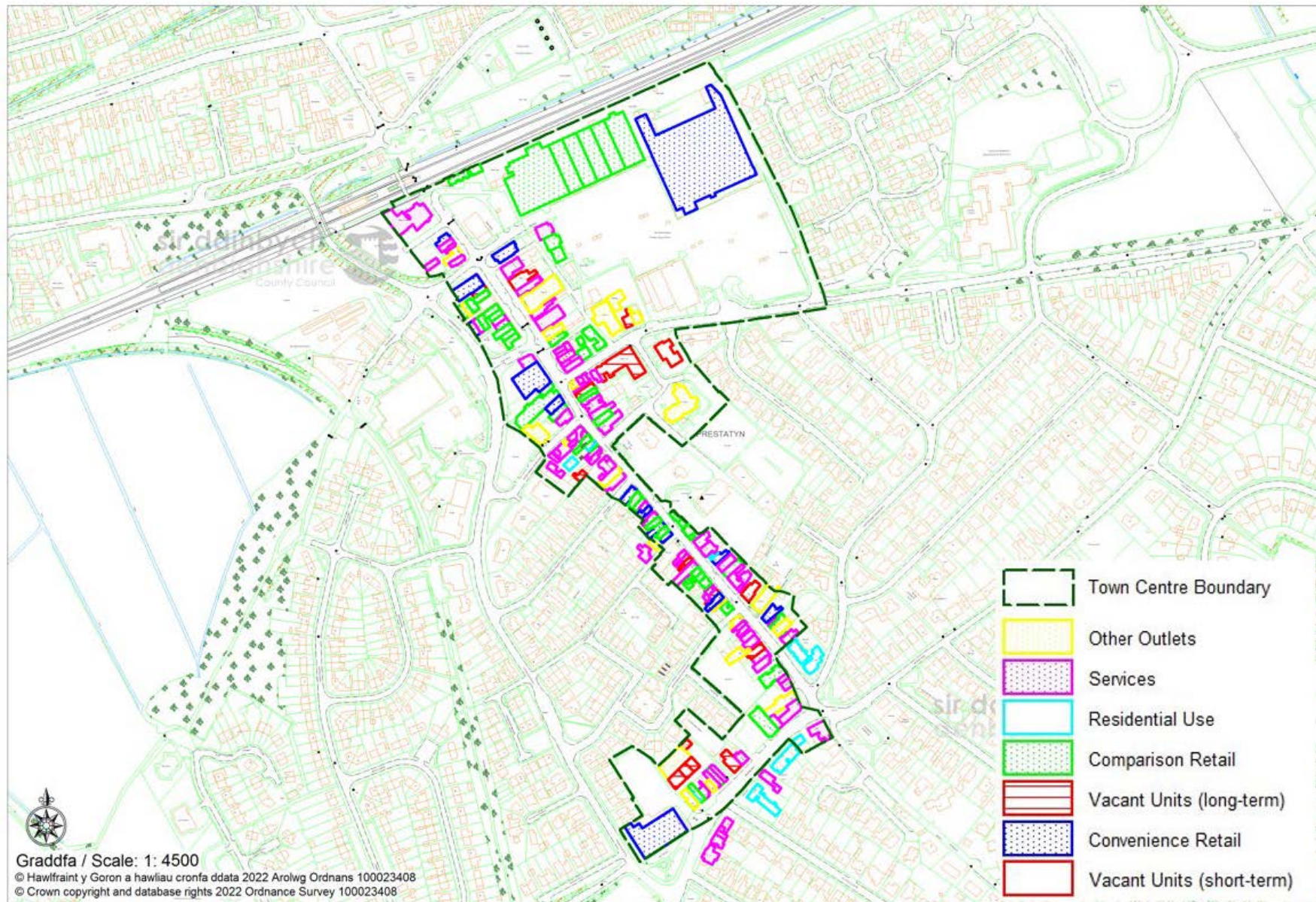
# Corwen town centre uses (January 2022)



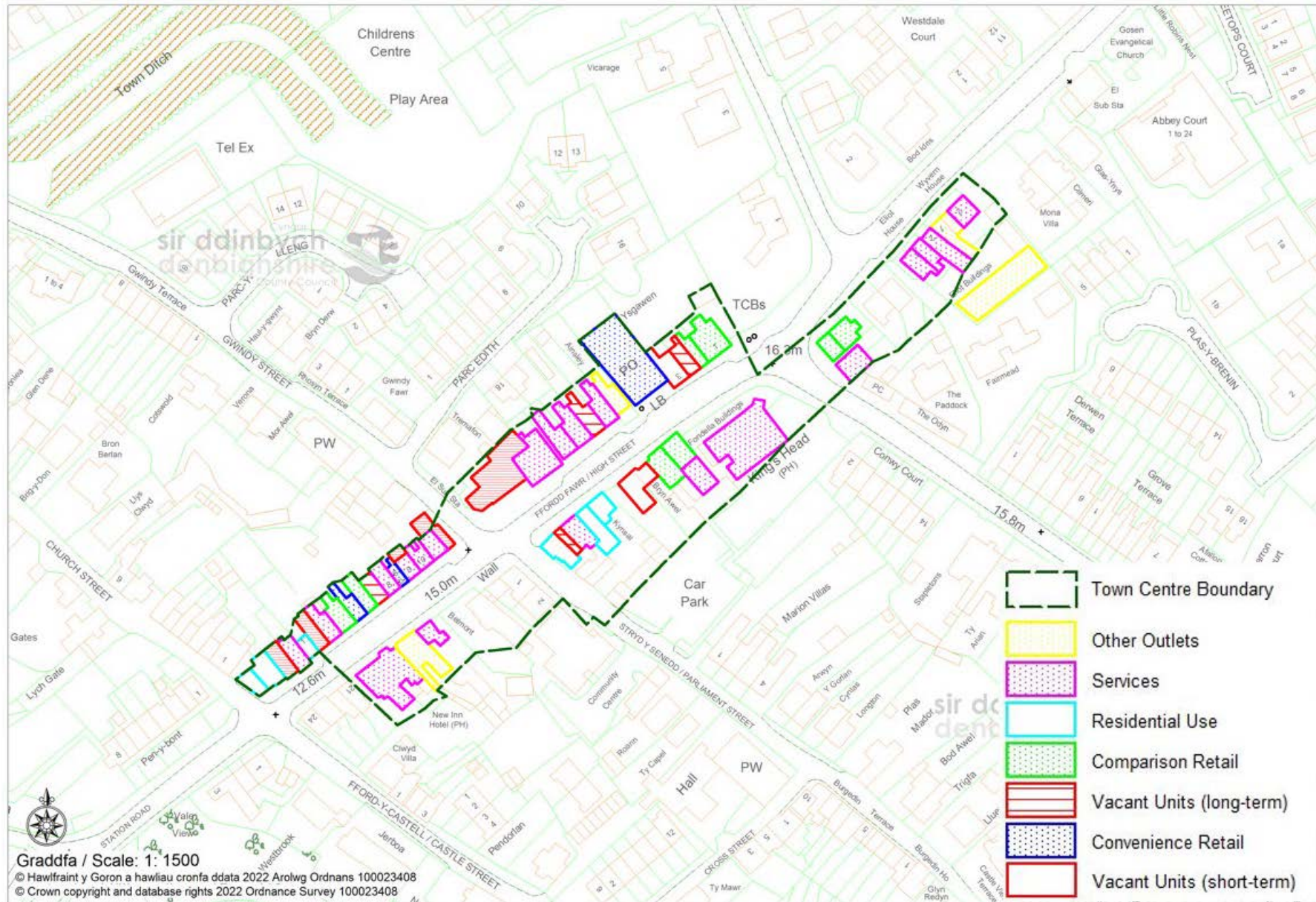




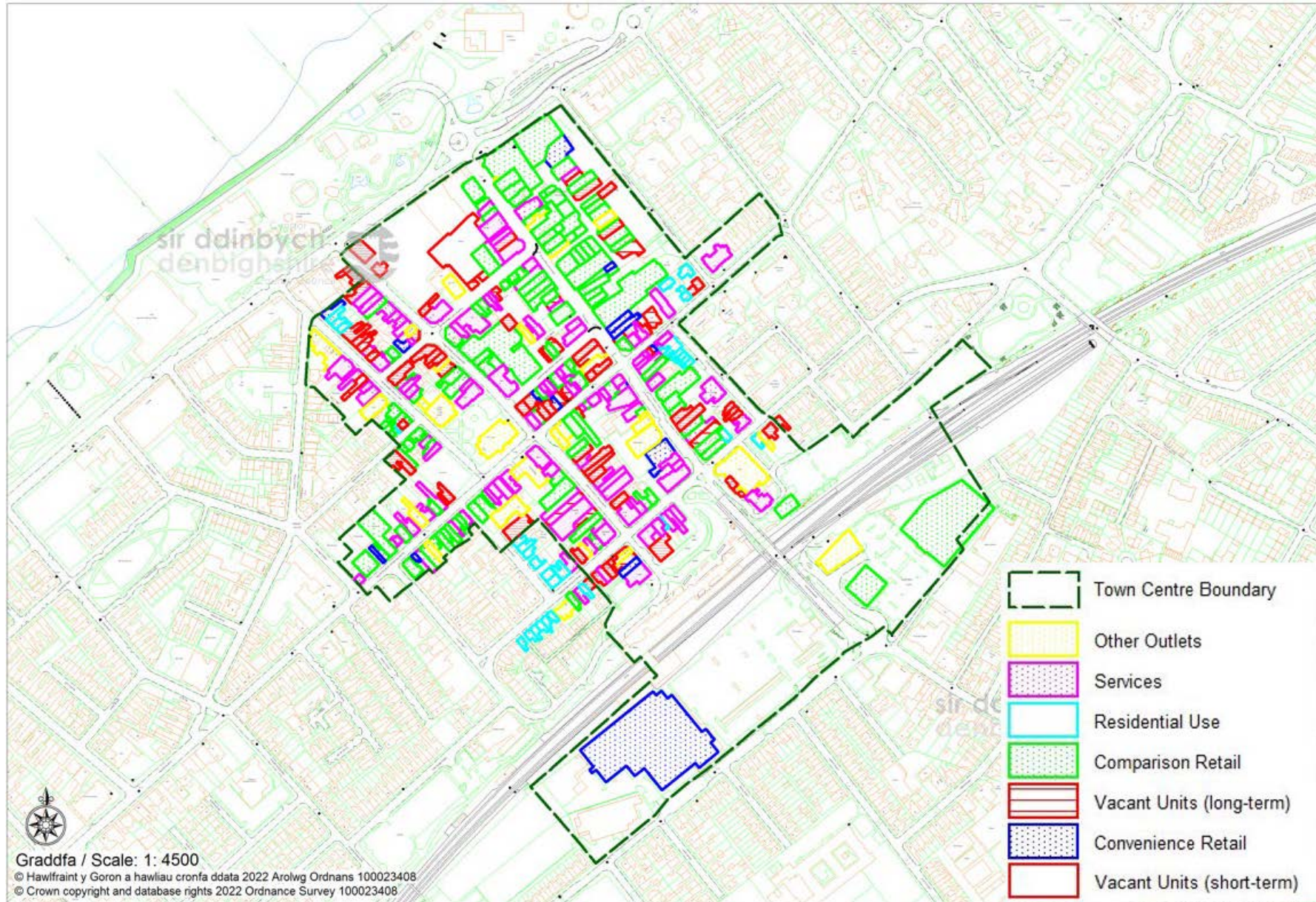
# Prestatyn town centre uses (January 2022)



# Rhuddlan town centre uses (January 2022)

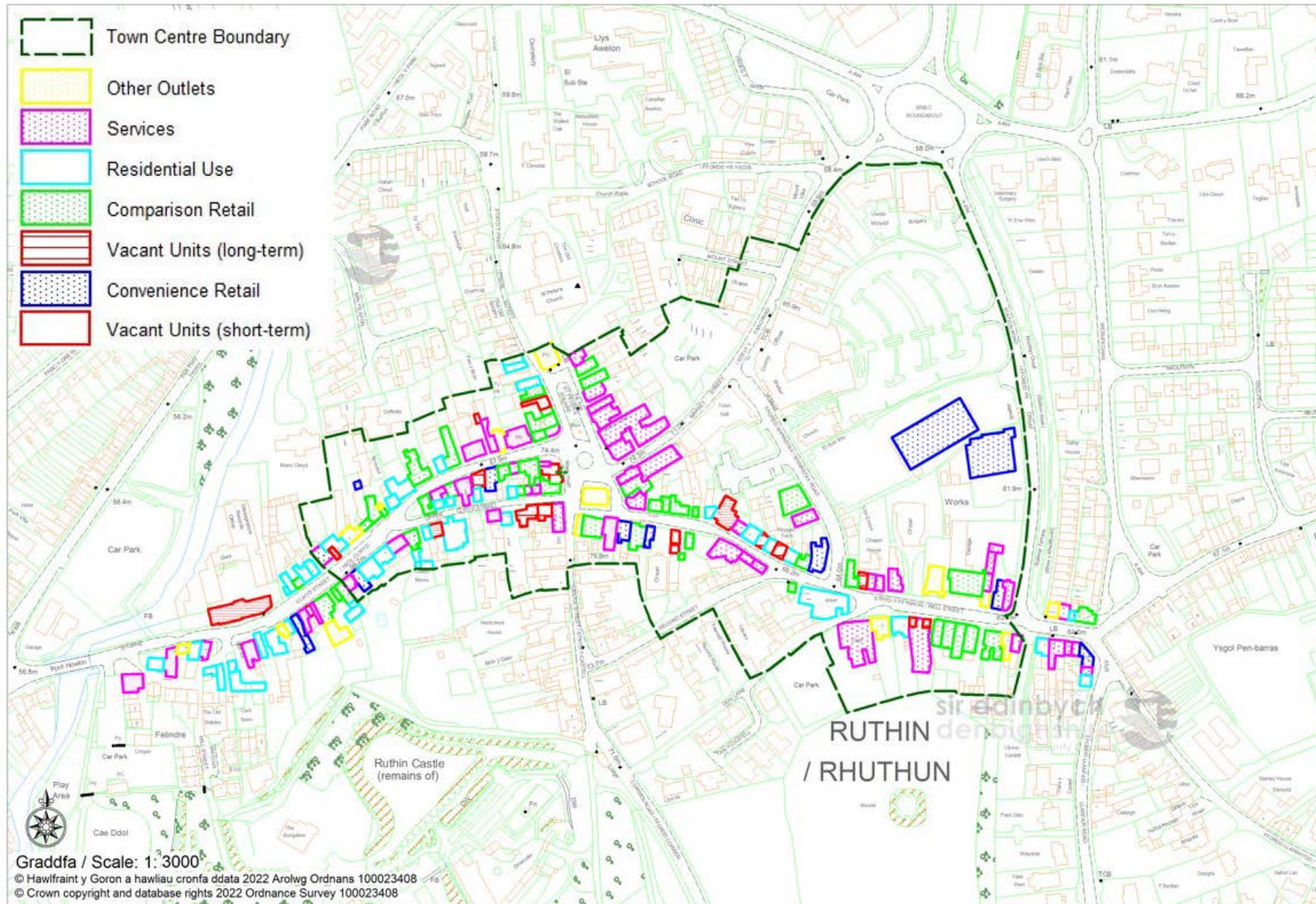


# Rhyl town centre uses (January 2022)





# Ruthin town centre uses (January 2022)



# St Asaph city centre uses (January 2022)

