



Denbighshire Town Centres Assessment - Final Report February 2024

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Denbighshire Town Centres Assessment - Final Report

Contents

1. Introduction	5
2. National policy	7
3. Recent trends	15
4. Hierarchy of town centres	38
5. Retail and food/beverage capacity	46
6. Leisure entertainment and cultural uses	64
7. Implications for planning policy	82
8. Summary and conclusions	102
Appendix 1 Denbighshire retail zones	111
Appendix 2 Audit of Centres	115
Appendix 3 Convenience retail capacity	152
Appendix 4 Comparison retail capacity	170
Appendix 5 Food / Beverage Capacity	186

Denbighshire Town Centres Assessment - Final Report

1. Introduction

Overview

- 1.1. Lichfields was commissioned by the Denbighshire County Council (“DCC” or “the Council”) to prepare a county-wide Town Centres Assessment. This assessment is expected to form part of the next Local Development Plan’s evidence base. The objectives are to provide supporting evidence on the potential approaches to retail and town centre uses, centre boundaries, frontage designations and measure to control the mix of uses.
- 1.2. This report provides a quantitative and qualitative assessment of the need for new retail, leisure and other main town centre uses within the County and policy recommendations. The assessment adopts the findings of a household survey undertaken by NEMS Market Research in September 2023.

Denbighshire Town Centres Assessment - Final Report

Report structure

- 1.3. Section 2.0 of this report summarises relevant national policy objectives.
- 1.4. Section 3.0 provides an overview of trends and recent changes that will affect the demand for main town centre uses. The appropriate policy and strategy approach for Denbighshire should reflect these underlying trends.
- 1.5. Section 4.0 examines the existing hierarchy of centres including a summary of the audit of the eight main town centres within Denbighshire, based on the Council's January 2023 Annual Town Centre Survey.
- 1.6. Section 5.0 sets out an update of the retail floorspace capacity assessment based on the latest available population and expenditure projections. It also provides a floorspace capacity assessment for Class A3 food/beverage uses.
- 1.7. Section 6.0 provides an assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses.
- 1.8. Section 7.0 reviews potential policy options for future development plan policy taking account of the floorspace capacity projections.
- 1.9. Section 8.0 summarises the main conclusions and recommendations.

Denbighshire Town Centres Assessment - Final Report

2. National policy

National Planning Policy

Planning Policy Wales

2.1. Planning Policy Wales [PPW] (12th Edition, February 2024) sets out the planning policies of the Welsh Government. The primary objective of PPW is to ensure that the planning system contributes towards the delivery of sustainable development and improves the social, economic, environmental and cultural well-being of Wales.

2.2. Placemaking lies at the heart of PPW. PPW states on page 14 that:

“Placemaking” is a holistic approach to the planning and design of development and spaces, focused on positive outcomes. It draws upon an area’s potential to create high quality development and public spaces that promote people’s prosperity, health, happiness and well-being in the widest sense...Placemaking adds social, economic, environmental and cultural value to development proposals resulting in benefits which go beyond a physical development boundary and embed wider resilience into planning decisions.”

2.3. PPW outlines that local service centres should be designated by local authorities as the preferred locations for most new development. Paragraph 4.3.2 states:

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

Denbighshire Town Centres Assessment - Final Report

2.4. On retail and commercial centres, paragraphs 4.3.5 to 4.3.6 state:

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

Retail and commercial centres will experience growth and decline, and development plans should identify these changing retail pressures and opportunities and devise appropriate responses to them in their retail strategies. In some situations it may be necessary to take pro-active steps to identify retail and commercial centre locations for expansion. In others it may be necessary to identify measures to reinvigorate centres or to manage a change in the relative importance of a centre as other centres’ roles expand. Strategies and supporting policies should be based on robust evidence.”

Denbighshire Town Centres Assessment - Final Report

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

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

2.6. PPW states that first preference should be to locate new retail and commercial development within a retail and commercial centre designated in the development plan's hierarchy of centres. On enabling vibrancy of centres, PPW paragraph 4.3.35 states that:

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

Denbighshire Town Centres Assessment - Final Report

2.8. This points towards the need to secure more diverse town centres where a range of uses are acceptable.

Future Wales: The National Plan 2040

2.9. Future Wales was published in February 2021 and forms part of the development plan. It is a development plan with a strategy for addressing key national priorities through the planning system.

2.10. Policy 6 of Future Wales reinforces the town centre first approach. However, this policy covers more than just retail and states that 'significant new commercial, retail, education, health, leisure and public service facilities must be located within town and city centres' and that a sequential approach must be followed. This is consistent with the Active Travel Wales Guidance (2021), Placemaking Guide (2020) and Planning Policy Wales Edition 12 (PPW12), in placing placemaking and the promotion of active travel in line with social inclusion at the forefront of new town centre development.

2.11. The supporting text to this policy explains this approach applies to developments of a significant scale, which can broadly be defined as where the facility will serve a town, city or region-wide catchment. However, it is up to local authorities to determine whether a development is considered of a significant scale.

Denbighshire Town Centres Assessment - Final Report

2.12. Each development should be assessed on its own merit against criteria that should be established in the development plan. These criteria may include matters such as:

- the quantum and nature of the use;
- is the use acceptable in the town centre without having an unacceptable impact on existing operators and residents;
- whether there are specific reasons why it cannot locate in the town centre (i.e. the need for significant floorspace that is not available or that the use requires a particular transport mode that is not appropriate to the town centre); and
- it is up to the applicant to provide robust justification as to why development cannot locate within the town centre.

2.13. The policy informs the plan making process including allocating sites for commercial, retail, education, health, leisure and public services. A sequential approach should be followed to ensure that the benefits of the use can be realised within or as close as possible to the town centre. This policy is key to ensuring that town centres are integrated with day to day uses and this provides the opportunity to meet placemaking and sustainability policies set out in Future Wales and PPW.

2.14. Pragmatism will be required where there is a development proposal that clearly needs to be located outside the town centre. The social and economic benefits of a proposal should not be dismissed only because there is a lack of sites in and on the edge of town centres. In some circumstances the use may not be appropriate in that location. In instances such as this it will be important to ensure that the sites are able to be reached via sustainable modes of transport including walking and cycling. For the smaller centres it will be important to balance the overall benefits of the proposal being located outside of the town centre.

Denbighshire Town Centres Assessment - Final Report

2.15. Denbighshire is in the Future Wales North Region. Rhyl and Prestatyn are within the Regional Growth Areas (Policy 21 North Wales Coastal Settlements). Sustainable growth of regionally important towns is supported along the northern coast. Rhyl and Prestatyn will be the focus for managed growth and will have an important sub-regional role complementing the National Growth area of Wrexham and Deeside.

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

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

2.17. The Welsh Government highlights the key planning policies and tools that should be used by all sectors in the environmental, social, cultural and economic recovery of Wales, recognising the continuing need for planners to operate within a wider context of priorities and actions.

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

Denbighshire Town Centres Assessment - Final Report

2.19. PPW demonstrates that policy areas work more effectively when they are considered together to get the maximum benefit. The key issues relating to town centres that bring individual policy areas together to ensure that action is the most effective are:

- staying local: creating neighbourhoods;
- active travel: exercise and rediscovered transport methods;
- revitalising our town centres;
- digital places – the lockdown lifeline; and
- reawakening Wales's tourism and cultural sectors.

Denbighshire Town Centres Assessment - Final Report

Permitted Development within Town Centres

2.20. In April 2021, temporary permitted development rights (Classes C-E, Part 4A) came into force which allowed town centre A1 uses to change to A2, A3, B1, D1 or D2 for a 6-month trial period with the need to obtain planning permission for change of use. The Welsh Government indicated that this approach would allow retail and commercial centres to adapt to future retail trends and to continue to meet the needs of local communities. In November 2021, the Welsh Government subsequently consulted on whether to make this permitted development right permanent, however, this change has not yet come into force. The Welsh Government has also committed to a wider piece of ongoing work with regards to the Use Class Order in Wales, TAN4 and PPW. Whilst the permanent permitted development right has not come into force yet, it is clear that the Welsh Government is committed to a more diversified town centre and a more flexible planning system that can adapt to the evolving demands of town centres.

2.21. The rapid changes that are affecting the retail sector and town centres are acknowledged and reflected in Future Wales, PPW (Edition 11), Building Better Places and temporary permitted development rights for town centre uses introduced by Welsh Government. These recognise that diversification is key to the long-term vitality and viability of town centres, to respond to rapid changes in the retail and leisure industries. Accordingly, planning policies should clarify the range of uses permitted in such locations, as part of a positive, modern strategy for the future of each centre.

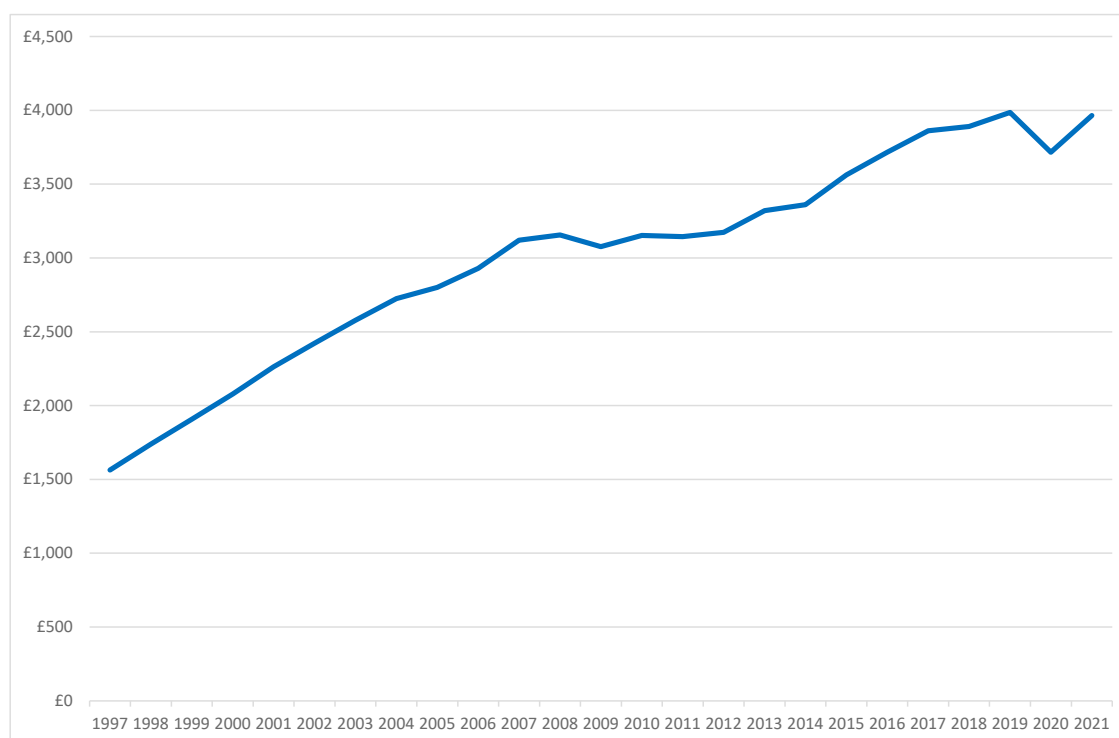
Denbighshire Town Centres Assessment - Final Report

3. Recent trends

Implications of Brexit, Covid-19 and other trends

3.1. Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1997 and 2021 is shown in Figure 3.1. Experian is a data provider most often used in evidence base studies that provides consumer expenditure data and other economic forecasts. High expenditure growth between 1997 and 2008 fuelled demand for new retail floorspace. However, since the last recession in 2009 expenditure growth has been much slower and the demand for retail floorspace has reduced significantly, particularly comparison goods retail floorspace.

Figure 3.1 Comparison goods expenditure average per head in the UK (constant prices)



Source: Experian Retail Planner Briefing Note 20 (February 2023)

Denbighshire Town Centres Assessment - Final Report

3.2. Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to continue to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (2022, 2023 and 2024) for retail and leisure now reflect the expected effects of Brexit and the Covid-19 pandemic. The current cost of living crisis will also suppress expenditure growth in the short term.

3.3. The main on-going implications of Brexit, Covid-19 and the cost of living crisis for the evidence base are likely to be as follows:

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

3.4. The key uncertainties relating to the first two points are primarily the post Covid-19 recovery and the length of the cost of living crisis. The longer-term structural implications are harder to predict and quantify at this stage, however there are already signs of a bounce back in terms of expenditure growth, but the cost of living crisis may suppress this recovery.

3.5. In the short term, operators have faced elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit. Short-term supply chain disruption led to inflationary pressures, which will have an impact on consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery benefitted in the short-term. There is likely to be a long-term structural shift to multi-channel shopping, reducing the demand for physical space within town centres.

Denbighshire Town Centres Assessment - Final Report

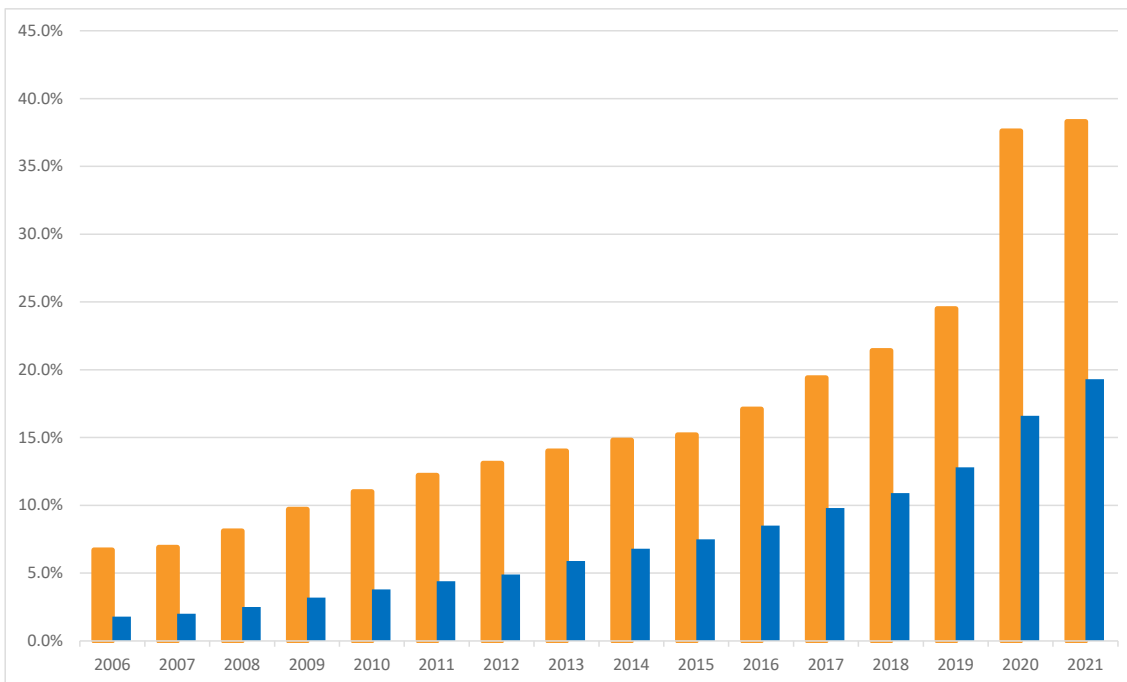
- 3.6. Bearing these trends in mind there has been a spike in town centre vacancies with some businesses failing to re-open following the Covid lockdowns, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost of living crisis are likely to exacerbate difficult trading conditions. Many UK operators have already announced job losses and store closures.
- 3.7. Brexit and Covid-19 could have short-term impacts in terms of population migration levels and a pause in construction activity. Given that the focus of this study is to assess the long-term need over the new local plan period within five-year interval projections, development plan policy should assume population projections will return to projected levels in the short-term. The population projections in five years should not be significantly affected by Covid-19 and cost of living crisis. It is not yet possible to understand if the short-term impact will continue into the medium and longer term projections to alter previous trends to any greater extent.
- 3.8. This study has adopted Experian's latest 2021 population estimates, which reflect these trends.
- 3.9. Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, in the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. Sales had recovered to 9% above pre-Covid levels by April 2021. The seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.

Denbighshire Town Centres Assessment - Final Report

- 3.10. The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced a 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February 2020 low point during March to November 2020.
- 3.11. ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.
- 3.12. During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.
- 3.13. Experian's Retail Planner Briefing Note 20 (February 2023) suggests non-store retailing's market share increased from 20.1% in 2019 to 30.7% in 2021. Non-store sales include all on-line sales and other forms of sales not generated from physical retail floorspace e.g. vending machines, party plan and deliveries. Comparison non-store sales increased from 24.5% to 38.3% and convenience good sales increased from 12.8% to 19.3%. However, Experian indicates comparison goods non-store sales figure fell slightly during 2022 down to 36%. Nevertheless, the 2022 figures remain significantly higher than the pre-Covid market shares in 2019. The growth in non-store retail sales in the UK between 2006 and 2021 is shown in Figure 3.2.

Denbighshire Town Centres Assessment - Final Report

Figure 3.2 Non-store sales as a percentage of total sales in the UK



Source: Experian Retail Planner Briefing Note 20 (February 2023) – Figure 5

3.14. This data shows a sharp increase during the Covid lockdowns during 2020 and 2022. However, Experian forecasts comparison goods non-store sales will have fallen slightly during 2022 down to 36%. Nevertheless, Experian's 2022 forecast figures remain significantly higher than the pre-Covid market shares in 2019.

Denbighshire Town Centres Assessment - Final Report

3.15. It is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact on traditional bricks and mortar retailing. Conversely the introduction of return fees for on-line shopping and increased free delivery thresholds may benefit traditional retailing. Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in on-line shopping when compared with historic trends. It is not appropriate to assume a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but longer term forecasts should be monitored and kept under review.

Denbighshire Town Centres Assessment - Final Report

Long-term expenditure trends

- 3.16. The current cost of living crisis, including the high level of inflation, has resulted in a reduction in retail expenditure per person during 2022, with many customers either trading down (buying cheaper products or using discount retailers) or cutting back (buying less products). Low growth is predicted during 2023 and 2024 but higher growth thereafter.
- 3.17. Planning based on long term expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans should assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. A cautious approach to expenditure growth is suggested by Experian, bearing in mind the uncertainties relating to the growth in on-line shopping.
- 3.18. For convenience goods, Experian's latest forecasts (February 2023) suggest a period of readjustment with the high growth in expenditure experienced during the Covid-19 lockdowns reversed during 2021 to 2024. In the longer term limited growth is forecast between 2025 to 2029 (0.1% per annum), increasing to 0.2% per annum thereafter. Experian expects slow expenditure growth and most of this growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Denbighshire is likely to relate to population growth, high current levels of trading or qualitative areas of deficiency.

Denbighshire Town Centres Assessment - Final Report

3.19. Comparison goods expenditure per head is predicted to decline by 2% during 2022 and 2023. A return to modest growth is expected in the longer term (between 2.5% to 3% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

3.20. New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 20 (February 2023) states:

"The pace of e-commerce growth is anticipated to moderate over the longer term, but the market share hits 38.2% of total retail sales by 2040."

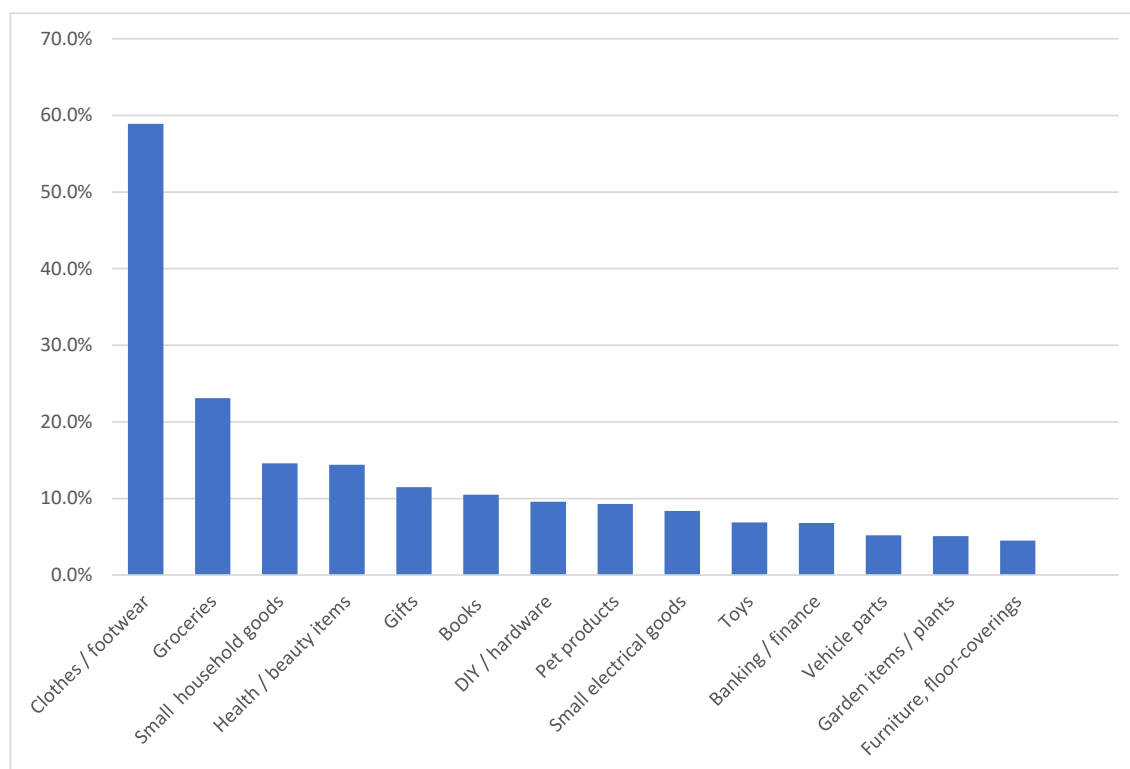
3.21. The floorspace capacity assessment in this study makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively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

Denbighshire Town Centres Assessment - Final Report

Denbighshire household survey results

3.22. The household survey results (605 completed interviews in September 2023) for Denbighshire, indicate many households regularly buy items from the internet for home delivery. Nearly 57% of Denbighshire households regularly buy goods or services via the internet. The products/services regularly purchased online are shown in Figure 3.3.

Figure 3.3 Items regularly purchased via the internet in Denbighshire (% of all households)



Source: NEMS household shopper survey September 2023 (weighted results)

3.23. These survey results indicate that a broad range of non-food goods are purchased on-line, but clothing /footwear and groceries are most often purchased online.

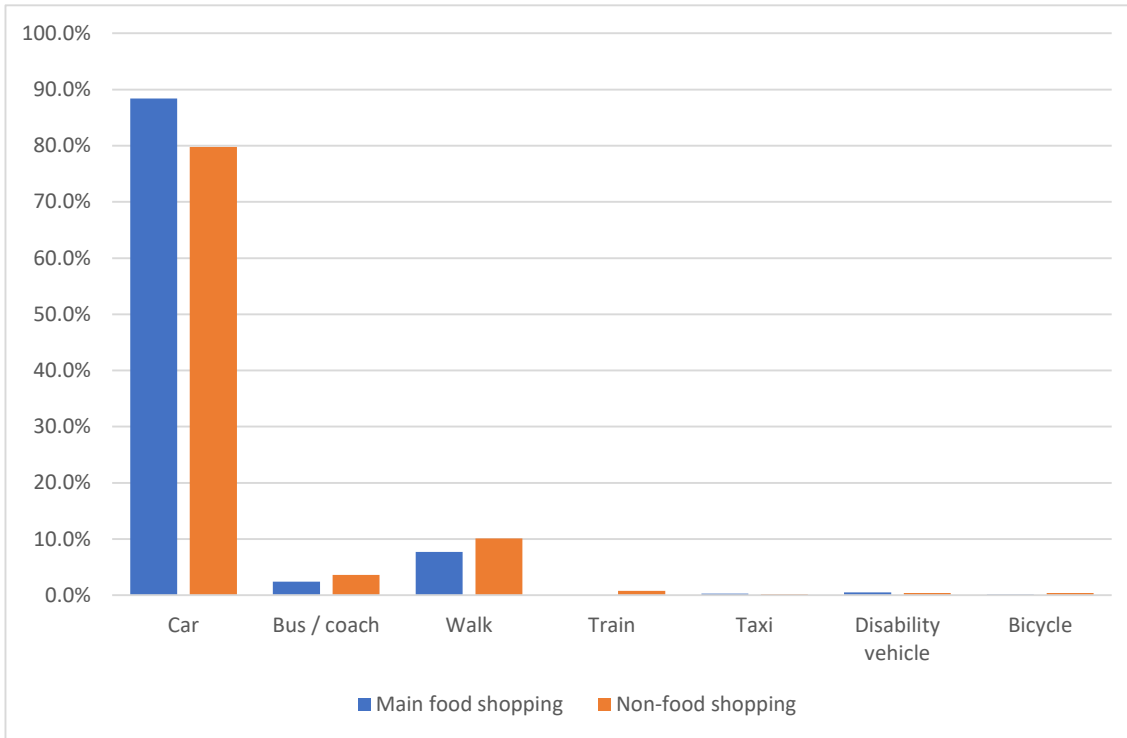
Denbighshire Town Centres Assessment - Final Report

Mode of travel and frequency of trips

- 3.24. The survey results suggest 25% of respondents do most of their household's non-food shopping on-line and 8% of households did their last main food and grocery shop via the internet/delivery. Experian suggests over 30% of retail sales was via non-store activity in 2021. These figures indicate many households do not need to travel to undertake food and non-food shopping.
- 3.25. Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 3.4.
- 3.26. Shopping by car (driver or passenger) is still the most popular mode of travel for both non-food and main food shopping trips. Relatively low proportions of customers walk or travel by public transport to shop for both food and non-food shopping.
- 3.27. Car usage is generally higher for main food shopping than for non-food shopping because many households still undertake bulk food and grocery shopping once a week or less often. Non-food shopping trips are generally undertaken less frequently. Bus and train travel is slightly higher for non-food shopping.

Denbighshire Town Centres Assessment - Final Report

Figure 3.4 Mode of travel for non-food and main food shopping in Denbighshire (% of travelling household respondents)



Source: NEMS household shopper survey September 2023 (weighted results).

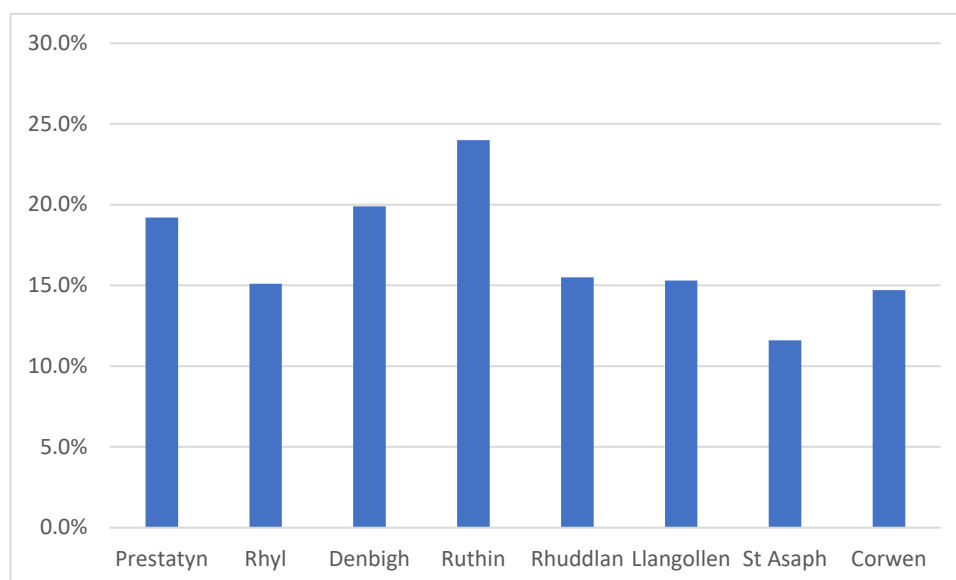
3.28. Car travel for food and non-food shopping was high across all retail zones but is slightly lower than average in Rhyl (Zone 1) and Prestatyn (Zone 2). Based on Lichfields' recent experience, car usage for shopping is generally lower in predominantly urban areas and higher in rural areas i.e. normally over 85% of households for main weekly shopping in rural areas. Lower levels of car usage in urban areas is normally due to higher levels of access to shopping facilities, both on foot and via public transport.

Denbighshire Town Centres Assessment - Final Report

Town centre accessibility

3.29. The household survey results provided visitor feedback on accessibility factors such as car parking and public transport. Of those who had used shops/services in each town centre, respondents were asked what they like about the town centre and what improvements would make them visit the centre more often. A main factor liked about all the town centres was the proximity to home, as shown in Figure 3.5.

Figure 3.5 Proportion of households mentioning the proximity to home as a factor liked about the town centres.



Source: NEMS household shopper survey September 2023 (weighted results).

3.30. The availability and cost of car parking were also positive and negative factors mentioned by many respondents. The proportion of respondents suggesting the ease of finding a car parking space was a positive factor compared with those suggesting the availability of parking should be improved (i.e. a negative factor) is shown in Figure 3.6.

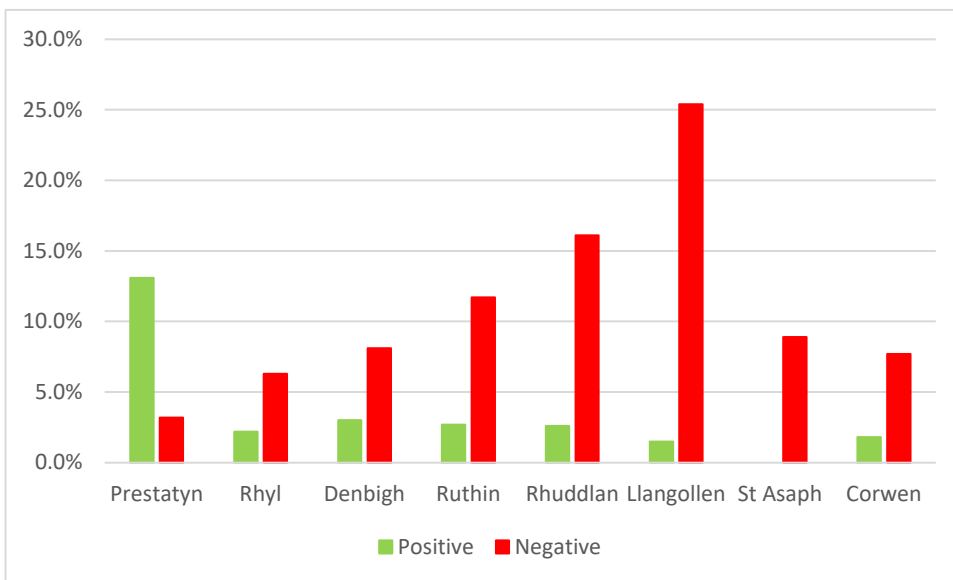
Denbighshire Town Centres Assessment - Final Report

3.31. The proportion of respondents suggesting free or cheap car parking space was a positive factor compared with those suggesting car parking should be cheaper or free (i.e. a negative factor) is shown in Figure 3.7.

3.32. More respondents suggested the availability and cost of car parking should be improved in all town centres except Prestatyn, which may be explained by the large surface car park at Parc Prestatyn Shopping Park. In terms of the number of respondents mentioning factors, the availability of spaces appears to be more important than the price of parking.

3.33. Dissatisfaction with the availability of car parking was highest in Llangollen and Rhuddlan. Dissatisfaction with the cost of car parking was highest in Corwen and Ruthin, although the proportion of respondents was relatively low, 8.9% and 6.7% respectively.

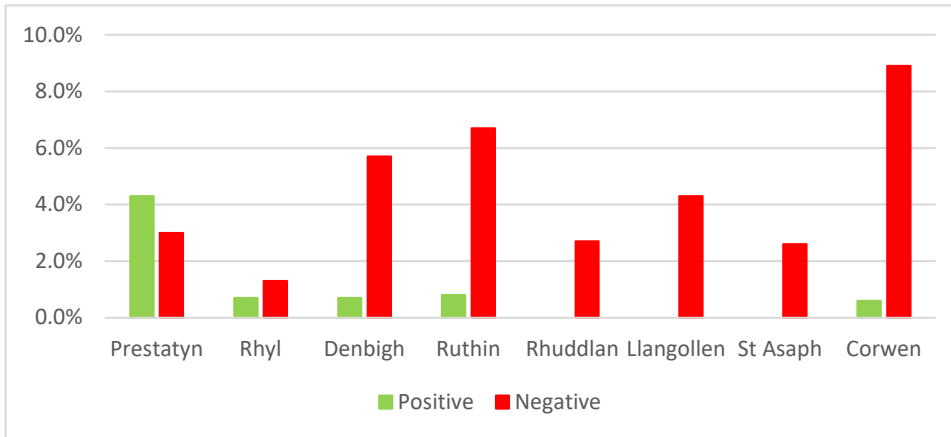
Figure 3.6 Proportion of respondents indicating availability of car parking spaces was a positive or negative factor.



Source: NEMS household survey September 2023 (weighted results).

Denbighshire Town Centres Assessment - Final Report

Figure 3.7 Proportion of respondents indicating cost of car parking spaces was positive or negative factor.



Source: NEMS household survey September 2023 (weighted results).

- 3.34. Relatively few respondents mentioned bus or train facilities/services as positive or negative factors about the town centres.

Demand for Town Centre Uses

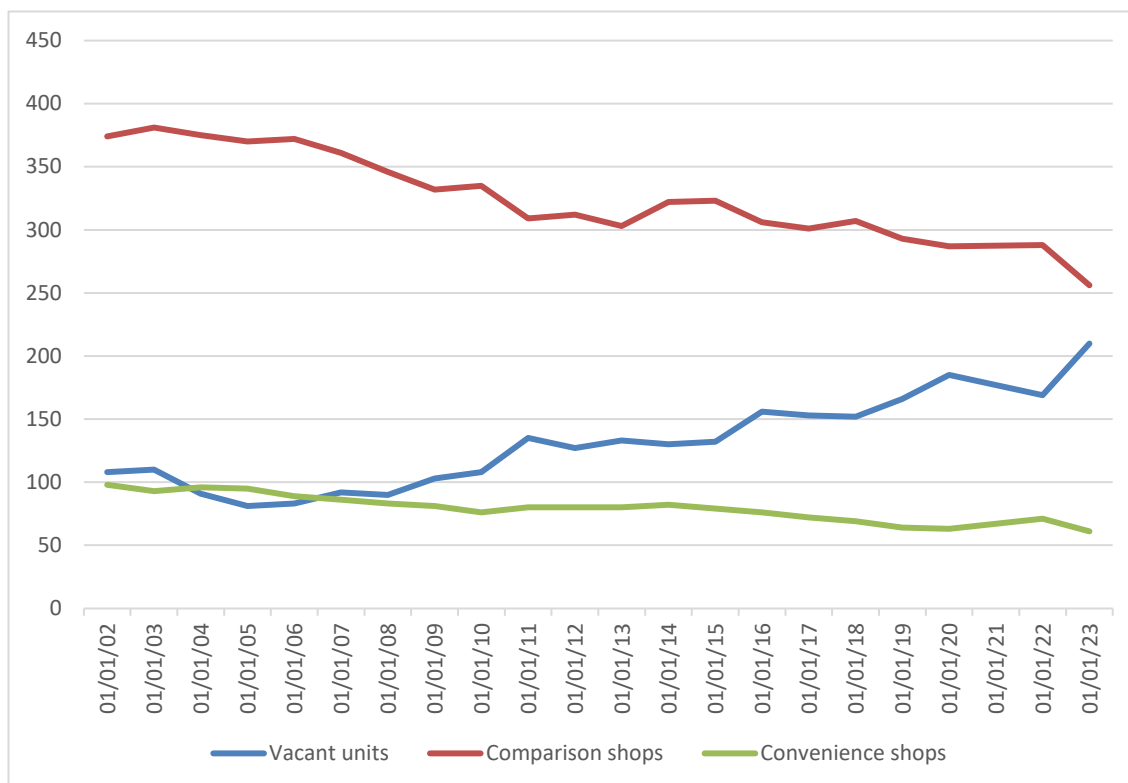
- 3.35. In the past, lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased to 14.4% in 2022. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, Brexit and the growth in on-line shopping. The more recent impact of higher inflation and the cost of living crisis is also likely to constrain consumer demand, which may affect the demand for floorspace at least in the short term.

Denbighshire Town Centres Assessment - Final Report

3.36. The Council’s surveys during January 2023 indicate the total number of vacant shop units was 210 in the County’s eight main town centres. The average shop unit vacancy rate in the County was 20.9% (excluding residential uses). Denbighshire’s shop vacancy rate is above the current UK average (14.5%) and much higher than the UK pre-Covid-19 average (12.4%).

3.37. The underlying increase in vacant units across the UK is primarily due to the reduction of comparison goods retail outlets. In most centres, non-retail services have helped to replace some of the lost comparison goods retail outlets. This UK trend has been experienced in Denbighshire. The number of retail shops and vacant units in the eight main town centres in Denbighshire is shown in Figure 3.5.

Figure 3.8 Number of retail shops and vacant units in Denbighshire’s main town centres (2002 to 2023)



Source: Denbighshire County Council land uses surveys

Denbighshire Town Centres Assessment - Final Report

- 3.38. The number of comparison goods shops in Denbighshire has fallen by nearly a third since 2003, with sharp falls following the recession in 2009 and during 2022, perhaps due to the cost of living crisis and continuing impact of the Covid lockdowns. The number of convenience goods shops has also declined steadily over the past two decades. As result of this decline in retail outlets the number of vacant shop units has nearly doubled since 2002. A more detailed analysis of the mix of uses in the Denbighshire's main centres compared with the UK picture is set out in Appendix 2.
- 3.39. Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through a company voluntary arrangement (CVA), i.e. an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets. These trends were exacerbated by Covid-19 and the cost of living crisis and will continue in the short-term.
- 3.40. Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time, newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing walls and indoor golf.

Denbighshire Town Centres Assessment - Final Report

Food store operators

- 3.41. In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).
- 3.42. Across the UK, the number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. The number of Tesco Express stores has increased by 35%, from 1,427 stores in 2012 to 1,920 stores in 2020 (source: Mintel). During the same period, Sainsbury's Local stores increased by 83% and the number of Little Waitrose stores doubled.
- 3.43. Several proposed large food superstores were not implemented across the UK. There has been a move away from larger superstores to smaller formats, reflecting changes in customers' shopping habits, i.e. more frequent but smaller food and grocery shopping trips. This trend may have increased with more homeworking during the pandemic lockdowns, which may not move back to pre-Covid levels in the future.
- 3.44. The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. These operators are now competing more directly for market share with other main food store operators. Home Bargains and B&M have also expanded rapidly in recent years. This trend is evident in Denbighshire with six Aldi stores, four Home Bargains, two Lidl stores and two B&M Bargain stores.

Denbighshire Town Centres Assessment - Final Report

Comparison retailers

- 3.45. Comparison retailers responded to difficult market conditions before the Covid-19 pandemic. The bulky goods warehouse sector had already rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers previously sought large out-of-centre stores, for example, Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends have slowed significantly and are unlikely to re-emerge for the foreseeable future.
- 3.46. The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on some retail warehouse parks and proposals to extend the range of goods sold to non-bulky comparison goods. This trend has also led to the relocation of retailers to out-of-centre locations, creating more vacant units in town centres. The discount sector has occupied many units on retail parks, e.g. Home Bargains, Poundland and B&M Bargains. The retail warehouse sector is reasonably well represented in Denbighshire including Cei Marina Retail Park in Rhyl, Clwyd Retail Park between Rhyl and Rhuddlan, and Parc Prestatyn Shopping Park.
- 3.47. Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in North Wales with the focus of comparison goods national multiples present in Llandudno, Rhyl, Prestatyn and Wrexham, and a limited provision in other smaller centres.

Denbighshire Town Centres Assessment - Final Report

3.48. In general, operator demand for space has decreased significantly during the last 5 years and, of those national multiples looking for space, many prefer to locate in larger centres. Centres in Denbighshire, apart from Rhyl and Prestatyn, are at a lower level in the hierarchy and multiple operator demand may be much less in these centres in the future. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Polarisation of investment in the larger centres is likely to continue in the future, with many retailers reducing their overall number of outlets.

3.49. The continuation of these trends will influence future operator space requirements in Denbighshire with smaller vacant units and lower tier centres continuing to be less attractive for new multiple occupiers, and retailers increasingly looking to locate into larger units in larger town centres. However, smaller vacant units could still be attractive to independent traders and non-retail services looking to serve local catchment areas.

Charity and discount shops

3.50. The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will change soon. Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops. In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in Denbighshire with a strong presence of charity shops in most centres. There are 21 charity shops in Denbighshire's main town centres, 8.2% of all comparison shops, which is slightly lower than the UK average of 9.9%. Denbigh (5) and Prestatyn (8) have high concentrations of charity shops.

3.51. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers.

Denbighshire Town Centres Assessment - Final Report

Non-retail services

3.52. Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following uses:

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

3.53. There are 9 betting shops in Denbighshire's main town centres in 2023, which is less than 1% of all shop units, lower than the UK average (1.6%). The main concentration of betting shops are in Rhyl (4) and Prestatyn (2).

3.54. There are 45 hot food takeaways in Denbighshire's main centres, 4.8% of all shop units, which is below the UK average of 6.4%. St Asaph (13.5%) has the highest proportion of hot food takeaways, followed by Corwen (8.6%) although the number of outlets is relatively small in these centres.

Denbighshire Town Centres Assessment - Final Report

The evening economy

3.55. Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

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

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

Denbighshire Town Centres Assessment - Final Report

3.57. The proportion of non-retail uses within town centres across the UK increased significantly before the Covid-19 crisis. There are 81 restaurant/cafés in Denbighshire's main town centres, 8.6% of all shop units, compared with the UK average of 10.4%. Llangollen (18.4%) has the highest proportion of restaurant/cafés followed by Corwen (11.4%), Rhuddlan (11.1%) and Prestatyn (10.7%).

Pop-up spaces

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

Denbighshire Town Centres Assessment - Final Report

Summary

- 3.59. The trends and changes highlighted in this section, including the growth of home shopping, are not new and have been affecting the high street for many years. In response to these trends, most town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants. However, the shop vacancy rate in Denbighshire remains high and has increased consistently over the last decade. The vacancy rate is significantly above the UK average, except for Llangollen (7.8%) and Prestatyn (12.5%).
- 3.60. There have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.
- 3.61. The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad UK shop vacancy rate has increased to over 14% and therefore a cautious approach to future development needs is required. The implications of the cost of living crisis also endorse a cautious approach to providing additional retail floorspace, particularly in out-of-centre locations.
- 3.62. Shopping behaviour will continue to change, and town centres will need to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example, using the internet as an extended shop window, click-and-collect facilities, and providing a combined retail, leisure and cultural experience for those looking for a "day out" or "evening outs."

Denbighshire Town Centres Assessment - Final Report

4. Hierarchy of town centres

4.1. PPW states that local planning authorities should develop through their development plans a clear strategy and policies for retail development which seek to achieve vibrant, attractive and viable retail and commercial centres. They should set out a framework for the future of retail and commercial centres in their area that promotes a successful retailing sector supporting existing communities. This section provides an overview of the shopping hierarchy in Denbighshire.

Denbighshire and the surrounding area

4.2. Denbighshire is adjoined by several other Local Authority Areas:

- Conwy and Gwynedd to the West;
- Flintshire to the East; and
- Wrexham to the South and East;
- Denbighshire's is relatively accessible to Wrexham, Chester and Llandudno.

4.3. The adopted Denbighshire Local Development Plan 2016 – 2021 (June 2013) remains the adopted plan for the local authority. It identifies the hierarchy of centres in Policy PSE 6 (Retail Economy). This policy places Rhyl at the top of the hierarchy as a Sub-Regional Centre. Prestatyn, Denbigh, Ruthin and Llangollen are Town Centre in the second tier. Rhuddlan, St Asaph and Corwen are designated District Centres. Prestatyn town centre has expanded significantly since the Plan was adopted, following the development of Parc Prestatyn Shopping Park.

Denbighshire Town Centres Assessment - Final Report

4.4. The Denbighshire Local Development Plan 2018-2033 – Preferred Strategy (2023) set out the hierarchy of settlements in the County as shown on the Denbighshire Character Map. The retail hierarchy is also set in the Plan and seeks to amend the designations in the adopted Plan. Rhyl, Prestatyn, St Asaph, Denbigh, Ruthin and Llangollen were identified as Main Centres. Main Centres are settlements with a strategic role in delivery of a variety of services and facilities. Rhyl and Prestatyn are identified as Principal Centre at the top of the retail hierarchy. Prestatyn is effectively upgraded to the same status as Rhyl. Denbigh, Llangollen and Ruthin are identified as Town Centres, consistent with adopted Policy PSE 6.

4.5. St Asaph, Corwen and Rhuddlan are identified as Local Centres, rather than District Centres within the adopted Plan, along with Bodelwyddan, Dyserth and Meliden. Local Centres are settlements that provide a more limited range of medical, education, medical, financial and retail services than the Main Centres. They are settlements with a local role in delivery of services and facilities for surrounding settlements and the open countryside. Village Centres, 13 in total, were also identified. These are smaller settlements with limited services providing services and facilities to sustain local needs.

4.6. Designated centres in Denbighshire are summarised and compared in Table 4.1, based on the Council's land use survey in January 2023. Table 3.2 excludes Class D1 and D2 leisure and community uses, Class C1/C2 and Class B employment uses.

4.7. Consistent with their proposed designation as Principal Centres, Rhyl (326 shop units) and Prestatyn (168 shop units), are the largest centres in Denbighshire with a reasonable range and choice of retail outlets. Ruthin, Llangollen and Denbigh are the next tier in the hierarchy with between 96 and 103 shop units. St Asaph, Rhuddlan and Corwen are much smaller with less than 50 shop units in total.

Denbighshire Town Centres Assessment - Final Report

4.8. A more detailed audit of the main town centres is set out later in this Section and in Appendix 2.

Table 4.1 Denbighshire - Number of outlets by use (January 2023)

Principal Centres

Centre	Total units	Class A1 Retail	Class A2 Financial/ Professional Services	Class A3 Food/ Beverage	Other non- retail services	Vacant shop/ service units
Rhyl	326	117	21	44	48	96
Prestatyn	168	58	10	32	47	21

Town Centres

Centre	Total units	Class A1	Class A2 Financial/ Professional Services	Centre	Total units	Class A1
Ruthin	130	49	9	18	29	25
Llangollen	103	42	7	28	18	8
Denbigh	96	25	12	11	20	28

Local Centres

Centre	Total units	Class A1	Class A2 Financial/ Professional Services	Centre	Total units	Class A1
Rhuddlan	45	9	6	8	13	9
St Asaph	37	7	2	9	6	13
Corwen	35	10	2	7	6	10
Main centres total	940	317	69	157	187	210

Source: Denbighshire Council's land use survey (January 2023).

Denbighshire Town Centres Assessment - Final Report

Diversity of main town centre uses.

4.9. Figure 4.1 overleaf shows the composition of the main town centres in terms of the mix and proportion of different Class A uses i.e. the proportion of shop units within each class. This is compared with the Denbighshire and UK averages.

4.10. The mix of uses varies significantly reflecting the different character and role of each centre, but all centres have a reasonable degree of diversity between retail, non-retail services and food/beverage outlets. However, the smaller centres have a lower portion of comparison goods shops. Only Rhyl and Llangollen have a higher proportion of comparison goods shops than the UK average.

4.11. The smaller centres tend to have lower proportions of retail uses and higher proportions of hot food takeaways and other non-retail services. Most centres have a good provision of non-retail services, particularly Prestatyn, Denbigh and Rhuddlan. The non-retail service uses in all centres perform an important role in the overall offer of a centre and encourage customers to shop locally. These non-retail service uses include:

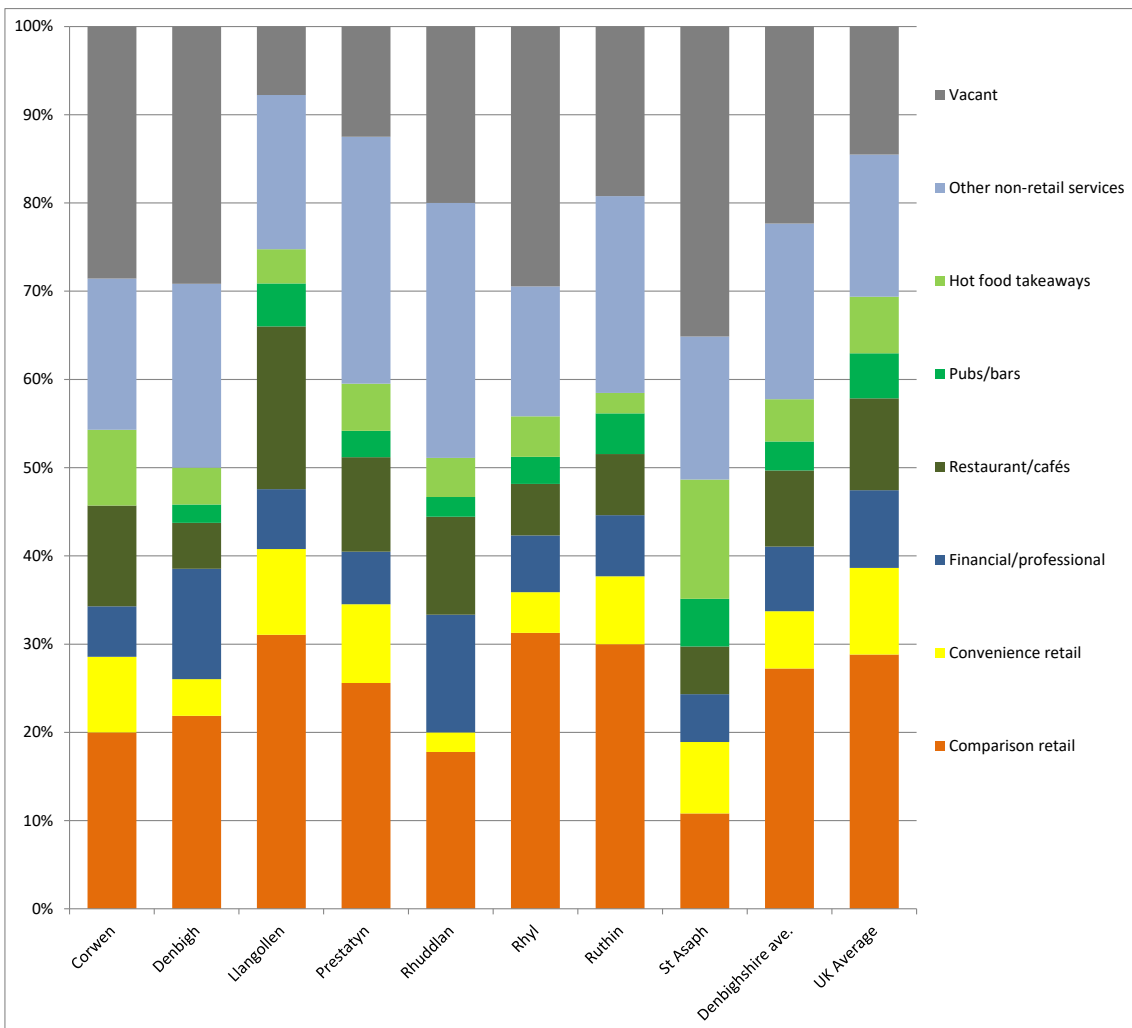
- financial and professional services including banks, building societies, financial services, estate agents and employment agencies; and,
- Other non-retail services including a range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

4.12. The overall proportion of food and beverage outlets (Class A3) is 16.7%, which is lower than the UK average (21.9%). However, Llangollen (27.2%) and St Asaph (24.3%) have higher than average proportions of food/beverage uses.

4.13. Shop vacancy rates are generally much higher than the UK average (14.5%). The Denbighshire average for the main centres is 22.3%. Llangollen (7.8%) and Prestatyn (12.5%) are the only centres with a shop vacancy below the UK average. Vacancy rates are particularly high in St Asaph (35.1%), Rhyl (29.4%) and Corwen (28.6%).

Denbighshire Town Centres Assessment - Final Report

Figure 4.1 Mix of retail and service uses (Class A and Sui Generis uses only)



Source: Denbighshire County Council Land Uses Survey (2023), Experian GOAD Plans UK Averages

Denbighshire Town Centres Assessment - Final Report

4.14. The existing network of centres offers a distribution of facilities serving local communities. Each centre has an important role in serving the day-to-day needs in their local areas. In addition to the audit of centres in Appendix 2, a local needs index for each centre has been undertaken. The focus is to assess the needs of residents and to what extent each centre is meeting these needs. There is no clear definition of need, but it is considered that residents could expect to find some, or most of the following shops, services and community uses within easy walking distance of their home:

- food or convenience store suitable for top-up shopping;
- bank;
- post office;
- newsagent;
- off licence;
- chemist;
- takeaway, café or restaurant;
- public house;
- bookmakers;
- laundrette/dry cleaners;
- hairdressers/beauty salon/barber;
- florist;
- estate agents;
- community hall;
- doctor's surgery; and
- library.

Denbighshire Town Centres Assessment - Final Report

4.15. Each centre in Denbighshire has been allocated a score out of 16, based on the number of categories of shops and services listed above (one point per category represented in the centre). The local needs index analysis is set out in Tables 4.2 and 4.3.

Table 4.2 Denbighshire – Local Needs Index Summary (January 2023)

Centre	Local Needs Index (score out of 16)	Number of convenience goods retail outlets
Prestatyn	16	15
Rhyl	14	15
Denbigh	13	4
St Asaph	11	3
Llangollen	10	10
Rhuddlan	10	1
Ruthin	10	10
Corwen	9	3

Source: Denbighshire Council's land use survey (January 2023).

4.16. All centres have a reasonably high local needs index score with most of the 16 categories represented. Corwen has the lowest score (9) with 7 of the 16 categories not represented in the centre. The local needs index scores and analysis provide a useful indicator of whether a town or local centre is meeting some or all the needs of residents.

Denbighshire Town Centres Assessment - Final Report

Table 4.3 Denbighshire – Local Needs Index (January 2023)

	Rhyl	Prestatyn	Denbigh	St Asaph	Llangollen	Rhuddlan	Ruthin	Corwen
Food/ convenience	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Banks	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
Post office	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes
Newsagent	Yes	Yes	No	Yes	Yes	No	Yes	No
Off licence	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Chemist	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes
Takeaway, café or restaurant	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Public house	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
Bookmakers	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Launderette, dry cleaner	No	Yes	No	Yes	No	Yes	Yes	Yes
Hairdresser, beauty salon	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Florist	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
Estate agents	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
Community hall	Yes	Yes	Yes	No	Yes	Yes	No	Yes
Doctor's surgery	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes
Library	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Source: Denbighshire Council's land use survey (January 2023).

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

Denbighshire Town Centres Assessment - Final Report

5. Retail and food/beverage capacity

Introduction

5.1. This section provides a quantitative assessment of the scope for new retail and food/beverage floorspace in Denbighshire up to 2038. The projections adopt Experian's latest forecasts for population growth, average expenditure per person, special forms of trading [SFT] and sales density growth rates.

Population

5.2. The quantitative capacity analysis is based on the County area sub-divided into six retail zones or areas, as shown in Appendix 1.

5.3. Experian's MMG3 projections suggest Denbighshire's population will increase by +1.94% between 2023 to 2038, increasing from 96,655 in 2023 to 98,533 in 2038, as shown in Table 1 in Appendix 3. The highest population growth will be in Zone 1 – Rhyl (+2.4%), Zone 4 – Denbigh (+2.9%) and Zone 5 – Ruthin (2.8%).

Tourism

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

5.5. Denbighshire attracts a reasonable share of tourist trips to North Wales. The Steam Final Trend Report for 2011 - 2022 indicates Denbighshire attracted 6.03 million tourist visitors in 2022 including 1.64 million staying visitors and 4.39 million day visitors. The total number of visitor days was 11.84 million in 2022.

Denbighshire Town Centres Assessment - Final Report

5.6. Spread through the year these tourist visitor estimates for 2022 suggest, on average, there were about 20,400 staying visitors and 12,000 other day visitors in Denbighshire each day. These tourist visitors will use shops, restaurants, bars and other facilities during their stay. Tourist visitors (day trips and staying visitors) equates to an extra 32,400 people each day throughout the year, which is significant in the context of the resident population in the study area (96,655 people).

5.7. The Steam Final Trend Report for 2011 - 2022 indicates Denbighshire's tourist visitors generated direct expenditure of £471.2 million in 2022. The breakdown of this expenditure was:

- Accommodation: £104.3 million (22%);
- Shopping: £146.3 million (31%);
- Food and beverage: £129.8 million (28%);
- recreation: £38.1 million (8%); and
- transport: £52.7 million (11%).

5.8. The Steam Report indicates visitors spent £146.3 million on shopping and £129.8 million on catering (food/beverage) in the County in 2022. This equates to an average of around £12.40 per staying visitor per day on shopping and £11.20 per day for catering. The Steam Report does not provide a breakdown of shopping expenditure between comparison and convenience goods, therefore Lichfields adopts a 65:35 split. An allowance for this spending has been included in the analysis.

5.9. The annual expenditure on shopping and eating/drinking out for all tourist visitors is estimated to be £276 million, broken down as follows: £51 million for convenience goods shopping, £95 million for comparison goods shopping and £130 million for food/beverage. In this context, the additional expenditure generated by tourist visitors is vital to the local economy and Denbighshire's town centres.

Denbighshire Town Centres Assessment - Final Report

Expenditure forecasts

5.10. All monetary values expressed in this update report are at 2021 prices, consistent with Experian's latest expenditure information. Experian's latest local expenditure figures for Denbighshire in 2021 have been obtained.

5.11. Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 20 – February 2023) has been used to forecast expenditure within Denbighshire. Experian's short term EBS growth forecast rates during 2022, 2023 and 2024 reflect current economic circumstances, including Covid-19 and the cost of living crisis. The forecast changes during this period are as follows:

- convenience goods: -9.3%;
- comparison goods: -1.7%;
- leisure: +21.1%.

5.12. These short-term forecasts reflect post Covid lockdown re-adjustments during 2022. Convenience goods expenditure increased during the lockdowns with households eating out less often than before the pandemic. Convenience goods expenditure is expected to have declined during 2022 and 2023 and forecast to decline during 2024. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns. The leisure sector was projected to have recovered during 2022. The comparison good retail sector is expected to have declined during 2022 and 2023.

5.13. In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted, as follows:

- convenience goods: +0.1% per annum growth for 2025 to 2029 and 0.2% per annum beyond 2029;
- comparison goods: +2.5% per annum growth for 2025 to 2029 and +3% per annum beyond 2029; and
- leisure: +1% per annum growth for 2025 to 2029 and +0.9% per annum after 2029.

Denbighshire Town Centres Assessment - Final Report

- 5.14. These growth figures relate to real growth and exclude inflation.
- 5.15. Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2023 are:
- 5.8% of convenience goods expenditure; and
 - 28.7% of comparison goods expenditure.
- 5.16. Experian's projections suggest that these percentages will increase to 7.7% and 32.0% by 2038, respectively.
- 5.17. Table 2 in Appendix 3 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2038, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 4 and food/beverage expenditure is shown in Table 2 in Appendix 5.
- 5.18. Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within Denbighshire is forecast to increase by +1.6% from £225.25 million in 2023 to £228.82 million in 2038, as shown in Table 3 in Appendix 3.
- 5.19. Comparison goods spending is forecast to increase by +39.6% between 2023 and 2038, increasing from £271.13 million in 2023 to £378.59 million in 2038, as shown in Table 3 in Appendix 4.
- 5.20. Food and beverage spending is forecast to increase by +19.5% between 2023 and 2038, increasing from £140.3 million in 2023 to £162.587 million in 2038, as shown in Table 3 in Appendix 5.
- 5.21. Tourist expenditure is projected to grow in line with Experian's forecast growth in expenditure per capita.

Denbighshire Town Centres Assessment - Final Report

Growth in turnover densities

- 5.22. Experian's Retail Planner Briefing Note 20 - February 2023 indicates comparison goods retail sales floorspace is expected to reduce its average sales density by -0.4% during 2024 but will grow in the medium term (+2% per annum during 2025 to 2029), and longer term (+2.8% per annum beyond 2029). These forecast increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.
- 5.23. For convenience goods retail, Experian indicates a 2.8% increase in sales densities during 2024; a small average increase of 0.1% per annum during 2025 to 2029; and no predicted growth in sales densities thereafter.
- 5.24. For leisure facilities, including food/beverage floorspace, Experian indicates a -0.7% decline in sales densities during 2024; a small average increase of 0.4% per annum during 2025 to 2029; and 0.2% growth per annum in sales densities thereafter.
- 5.25. These sales density growth rates are relatively high compared with historic forecasts but are consistent with the expected high increase in on-line/home shopping through retail businesses i.e., the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.

Denbighshire Town Centres Assessment - Final Report

Base year market shares

5.26. The turnover of facilities within Denbighshire is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates have been estimated for shopping and food/beverage facilities based on a household shopper survey undertaken in September 2023.

5.27. The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 3 and Table 4 in Appendix 4, respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendix 5.

5.28. The results of the household shopper survey regarding main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 3 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind.

Table 5.1 Food and grocery trip retention in Denbighshire (% of all trips in each zone)

Retail zone	Main trip	Top-up	Combined market share
1 – Rhyl	88.9	96.0	91.0
2 – Prestatyn	98.2	100.0	98.7
3 – Elwy (Rhuddlan/St Asaph)	80.2	93.5	84.2
4 – Denbigh	98.6	100.0	99.0
5 – Ruthin	76.1	94.6	81.6
6 – Dee Valley (Corwen/Llangollen)	66.8	83.0	71.7

Source: NEMS household survey results September 2023

Denbighshire Town Centres Assessment - Final Report

- 5.29. Denbighshire's retention of convenience goods shopping trips is relatively high across all retail zones, particularly Zone 2 – Prestatyn and Zone 4 – Denbigh. Most of the expenditure leakage from Zone 1 – Rhyl and Zone 3 – Elway relates to the large Asda superstore at Kinmel Bay close to the County boundary. The County's market shares are much lower in the two retail zones that lie in the south of the County i.e. Zone 5 – Ruthin and Zone 6 – Dee Valley due to the draw of large food stores within Mold and Wrexham.
- 5.30. These figures indicate that most residents undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips. The household survey results and distribution of food stores within and surrounding the study area suggest there is limited potential for Denbighshire to increase its market share of convenience goods expenditure in the future, particularly in the north of the County.
- 5.31. The market shares for comparison goods shopping in Table 4, Appendix 4 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower levels of comparison goods trip retention for all goods categories within most study area retail zones, as shown in Table 5.2.
- 5.32. Retention rates are highest in the north of the County and lower in the south half of the County, where there are higher levels of trip leakage to Chester, Mold and Wrexham.

Denbighshire Town Centres Assessment - Final Report

Table 5.2 Non-food comparison trip retention (% of all trips in each zone – excluding internet shopping)

Retail Zone	Clothing footwear	Domestic electrical	Other electrical	Furniture floor-covering textile	DIY hardware garden	Health beauty	Books stationery	Toys hobbies pets	Other non-food	Combined weighted. Market share
1 – Rhyl	59.9	94.2	87.0	63.2	97.6	92.8	85.5	81.2	92.7	79.1
2 – Prestatyn	76.9	95.3	90.7	61.9	100.0	100.0	85.5	84.8	73.0	82.7
3 – Elwy (Rhuddlan/St Asaph)	59.6	91.1	86.6	39.2	79.2	81.1	70.8	51.8	47.8	62.4
4 – Denbigh	54.5	91.3	92.2	67.7	66.9	88.4	64.0	69.4	63.8	70.2
5 – Ruthin	39.2	58.6	34.2	25.3	62.4	69.3	51.2	50.3	18.5	42.8
6 – Dee Valley (Corwen/Llangollen)	10.0	5.8	4.6	6.5	43.4	55.8	62.4	40.4	32.2	28.4
All retail zones	55.7	82.3	75.2	51.2	81.5	86.1	74.5	69.9	60.9	65.7

Source: NEMS household survey results September 2023

5.33. The retention rates are higher for day-to-day comparison goods such as health and beauty products and books. The retention rates for DIY and electrical goods are also high due the availability of retail warehouse outlets in Denbighshire. However, the retention rates are weaker for higher order comparison goods such as clothing/footwear and furniture/floor-coverings.

5.34. The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 5 are a combined rate for both eating out and drinking at pubs/bars are based on an 80:20 split, based on Experian’s local expenditure data. The survey results suggest reasonably high levels of trip retention within the study area, as shown in Table 5.3.

Denbighshire Town Centres Assessment - Final Report

Table 5.3 Food and beverage trip retention (% of all trips in each zone)

Retail zone	Eating out	Drinking away from home	Combined market weighted share
1 – Rhyl	73.3	100.0	78.7
2 – Prestatyn	73.4	82.1	75.2
3 – Elwy (Rhuddlan/St Asaph)	66.0	82.5	69.3
4 – Denbigh	82.1	87.8	83.2
5 – Ruthin	53.7	68.3	56.7
6 – Dee Valley (Corwen/Llangollen)	57.5	76.9	61.4

Source: NEMS household survey results September 2023

5.35. The survey results suggest lower levels of food/beverage trip retention rate than for convenience goods shopping but similar levels of retention compared with comparison goods shopping. However, the gap between retention rates in the north and south of the County are not as great, suggesting less outflow to Chester, Mold and Wrexham for food/beverage trips when compared with comparison goods shopping.

5.36. Retention rates are higher for drinking away from the home than eating out, which suggests some Denbighshire residents are prepared to travel further to visit restaurants outside the County.

Denbighshire Town Centres Assessment - Final Report

Capacity for convenience goods retail floorspace

5.37. Based on the market shares calculated from the September 2023 household survey results and the tourism expenditure estimates, available convenience goods expenditure attracted to Denbighshire in 2023 is shown in Table 4 in Appendix 3. This expenditure has been projected forward to 2028, 2033 and 2038, and is summarised in Table 10 in Appendix 3. Convenience goods expenditure available to facilities within Denbighshire is expected to increase from £252.69 million in 2023 to £255.68 million in 2038. This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT). A breakdown of turnover for facilities in each zone is set out in Table 5.4.

Table 5.4 Convenience goods base year turnover in 2023.

Retail zone	Turnover £M
1 – Rhyl	75.67
2 – Prestatyn	66.32
3 – Elwy (Rhuddlan/St Asaph)	18.83
4 – Denbigh	38.00
5 – Ruthin	38.62
6 – Dee Valley (Corwen/Llangollen)	15.24
All retail zones	252.69

Source: Table 10 in Appendix 3.

5.38. The benchmark turnover of the main food stores within Denbighshire is calculated in Table 9 in Appendix 3. The benchmark turnover is based on the sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading.

Denbighshire Town Centres Assessment - Final Report

- 5.39. The combined benchmark turnover of the main food stores is estimated to be about £264.14 million. This estimated benchmark turnover suggests convenience goods shopping facilities in the County are trading below average and there is no surplus expenditure available to support new food stores, particularly in the north of the County in Rhyl and Prestatyn.
- 5.40. Table 10 in Appendix 3 subtracts the projected turnover of existing convenience goods floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future.
- 5.41. The figures shown in Table 10 indicate there is a projected convenience goods expenditure deficit of -£9.91 million in 2028 because population and expenditure growth will be offset by an increase in home shopping (SFT) and increases in sales densities. This expenditure deficit is projected to reduce slightly to -£8.19 million in 2033. Continued population growth reduces the deficit to -£5.39 million in 2038. These projections suggest there is limited capacity for additional convenience goods facilities in Denbighshire for the foreseeable future up to 2038.
- 5.42. The deficit expenditure projections are converted into floorspace over-supply estimates in Table 11 in Appendix 3, based on a combined company average sales density of £12,000 per sq.m net of the main food store operators. The results are summarised in Table 5.5.

Denbighshire Town Centres Assessment - Final Report

Table 5.5 Convenience goods floorspace capacity (sq.m gross) – cumulative

Retail zone	2028	2033	2038
1 – Rhyl	- 351	- 284	- 186
2 – Prestatyn	- 324	- 291	- 240
3 – Elwy (Rhuddlan/St Asaph)	- 85	- 72	- 47
4 – Denbigh	- 161	- 128	- 65
5 – Ruthin	- 152	- 112	- 47
6 – Dee Valley (Corwen/Llangollen)	- 70	- 57	- 35
Total	- 1,143	- 944	-621

Source: Table 11 in Appendix 3.

5.43. The deficit expenditure projections imply a small combined over-supply of convenience goods floorspace in Denbighshire of 621 sq.m gross in 2038.

5.44. Main shopping trips are generally made once a week or less often. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of bulk food shopping trip. Food store provision is shown in Table 9 in Appendix 3.

5.45. Collectively, the main town centres in Denbighshire have 61 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. There are three food superstores (over 2,500 sq.m net) in Denbighshire i.e. Morrisons and Sainsbury's superstores in Rhyl and Tesco in Prestatyn. There is also an Asda superstore nearby in Kinmel Bay in Conwy County Borough, which serves the Rhyl area. In addition to these food superstores, there is good choice of other large stores/supermarkets and smaller convenience stores. There are 11 large food stores (900 to 2,000 sq.m net). The discount food sector is well represented by Aldi, Lidl, B&M Bargains, Home Bargains and Iceland stores. There is a good selection of smaller convenience stores (under 900 sq.m net) including nine Co-op stores.

Denbighshire Town Centres Assessment - Final Report

5.46. Residents across the County have good access to a range and choice of food stores. The most obvious areas of deficiency in food store provision are the rural areas in the south of the County (Zone 5 – Ruthin and Zone 6 – Dee Valley). However, outside Ruthin and Llangollen, population within these rural areas may be too low and dispersed to support larger food stores. Smaller settlements in these retail zones are probably too small to sustain a large food store and existing food stores are relatively accessible in Mold and Wrexham.

Capacity for comparison goods floorspace

5.47. Available comparison goods expenditure has been projected to 2028, 2033 and 2038 is summarised in Table 9 in Appendix 4. Comparison goods expenditure available to facilities in Denbighshire is expected to increase from £229.41 million in 2023 to £318.76 million by 2038. A breakdown of turnover for facilities in each zone is set out in Table 5.6.

Table 5.6 Comparison goods base year turnover in 2023

Retail zone	Turnover £M
1 – Rhyl	96.93
2 – Prestatyn	60.38
3 – Elwy (Rhuddlan/St Asaph)	18.84
4 – Denbigh	21.61
5 – Ruthin	22.19
6 – Dee Valley (Corwen/Llangollen)	9.45
All retail zones	229.41

Source: Table 9 in Appendix 4.

Denbighshire Town Centres Assessment - Final Report

5.48. Table 10 in Appendix 5 subtracts the turnover of existing floorspace including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be offset by expected growth in turnover densities i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect (from stores or collection points), which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.

5.49. By 2028 there is a projected expenditure deficit of -£2.81 million, increasing to -£4.51 million in 2033 and £4.69 million in 2038. These projections suggest growth in turnover densities will absorb future expenditure growth. The deficit expenditure projections have been converted into floorspace over-supply estimates Table 10 in Appendix 4. The results are summarised in Table 5.7.

Table 5.7 Comparison goods floorspace capacity (sq.m gross) – cumulative

Retail zone	2028	2033	2038
1 – Rhyl	- 249	- 336	- 299
2 – Prestatyn	- 174	- 253	- 263
3 – Elwy (Rhuddlan/St Asaph)	- 52	- 78	- 77
4 – Denbigh	- 45	- 64	- 44
5 – Ruthin	- 34	- 48	- 24
6 – Dee Valley (Corwen/Llangollen)	- 26	- 37	- 33
Total	- 580	- 816	- 739

Source: Table 10 in Appendix 4.

Denbighshire Town Centres Assessment - Final Report

- 5.50. The deficit expenditure projection to 2038 implies a combined small over-supply of comparison goods floorspace in Denbighshire of -739 sq.m gross.
- 5.51. Collectively main town centres within Denbighshire have 256 comparison goods outlets including a mix of national retailers and small independent shops. There is additional provision within the large retail parks in Rhyl. Nearly 57% of the comparison goods shopping floorspace is concentrated in Rhyl and Prestatyn town centres. The remaining comparison good shops are relatively dispersed and most other shopping destinations within the County provide a limited range and choice of comparison shops. However, the southern half of Denbighshire is also served by Chester, Mold and Wrexham.
- 5.52. The reasonably high comparison goods retention rates suggest there is limited the potential for Denbighshire to increase its market share of comparison goods expenditure and reduce expenditure leakage in the northern half of the County. There is more theoretical potential to increase market share in the southern half of the Country but dispersed population and good accessibility to Chester, Mold and Wrexham may restrict the potential to achieve this uplift.
- 5.53. The floorspace projections shown in Table 4.7 assume constant market shares in the future. Small increases in market shares could counter-balance the negative floorspace projections.

Capacity for food/beverage floorspace

- 5.54. Available food and beverage expenditure has been projected forward to 2028, 2033 and 2038, and is summarised in Table 10 in Appendix 5. The amount of expenditure attracted to Denbighshire is expected to increase from £233.82 million in 2023 to £268.02 million in 2038. Food/beverage provision in Denbighshire is set out in Table 9 in Appendix 5. A breakdown of turnover for facilities in each zone is set out in Table 5.8.

Denbighshire Town Centres Assessment - Final Report

Table 5.8 Food and beverage base year turnover in 2023

Retail zone	Turnover £M
1 – Rhyl	53.37
2 – Prestatyn	52.69
3 – Elwy (Rhuddlan/St Asaph)	43.77
4 – Denbigh	23.64
5 – Ruthin	33.20
6 – Dee Valley (Corwen/Llangollen)	27.16
All retail zones	233.62

Source: Table 10 in Appendix 5

5.55. Table 10 in Appendix 5 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. In 2028 there is a projected food/beverage expenditure surplus of +£7.62 million. Continued population and expenditure growth creates an expenditure surplus of £16.71 million in 2033 increasing to £26.85 million by 2038. Floorspace capacity projections are shown in Table 11 in Appendix 5 and summarised in Table 5.9.

Denbighshire Town Centres Assessment - Final Report

Table 5.9 Food and beverage floorspace capacity (sq.m gross) – cumulative

Retail zone	2028	2033	2038
1 – Rhyl	282	621	991
2 – Prestatyn	275	601	951
3 – Elwy (Rhuddlan/St Asaph)	242	518	825
4 – Denbigh	129	277	442
5 – Ruthin	190	402	637
6 – Dee Valley (Corwen/Llangollen)	142	309	494
Total	1,259	2,728	4,340

Source: Table 11 in Appendix 5.

5.56. Collectively main centres within Denbighshire have 157 food/beverage outlets. These facilities are distributed throughout the designated centres, but the main concentrations are in Rhyl town centre (44 outlets) and Prestatyn (32 outlets). The other centres have a small choice of food/beverage outlets, ranging from seven outlets in Corwen to 18 outlets in Llangollen. There appears to be qualitative and quantitative potential to improve evening economy related food/beverage uses.

Denbighshire Town Centres Assessment - Final Report

Summary

- 5.57. The quantitative floorspace capacity projections suggest retail expenditure and population growth up to 2038 will be offset by the growth in home shopping and increases in sales densities. As a result, there is no residual expenditure growth to support new retail floorspace in Denbighshire. These projections assume Denbighshire will maintain its existing market share of expenditure in the study area and the number of tourist visitors will remain constant.
- 5.58. In qualitative terms, Denbighshire shire has a good choice of large food superstores, supermarkets and smaller convenience stores. The most obvious areas of deficiency in food store provision are the rural areas in the south, west and southeast. However, the settlements in these areas are probably too small to sustain a large food store.
- 5.59. Collectively, Denbighshire has a mix of national retailers and independent shops that provide a reasonable range and choice of comparison shops. However, most comparison goods shops are concentrated in Rhyl and Prestatyn in the north of the County. Other shopping destinations provide a limited range and choice of comparison shops. The high level of existing expenditure retention in the north of the County, dispersed population in the South and access to Chester, Mold and Wrexham suggests there is limited potential for Denbighshire to increase its market share of retail expenditure.
- 5.60. The provision of restaurants and bars serving the evening economy varies from centre to centre. The growth projections and qualitative analysis, suggests there is potential to improve the evening and night-time economy related to food/beverage uses in centres across the County.
- 5.61. The implications of the floorspace capacity projections and qualitative need assessment for future policy are addressed in Section 6.0.

Denbighshire Town Centres Assessment - Final Report

6. Leisure entertainment and cultural uses

Introduction

6.1. This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and health and fitness clubs. The assessment excludes less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches.

Leisure, entertainment and cultural expenditure

6.2. Experian's projections and local expenditure data for Denbighshire indicates the resident population generates £26.72 million in 2023 (an average of about £276 person) on selected cultural, recreational and sporting services, including:

- cinema admissions;
- live entertainment i.e. theatre/concerts/shows;
- museums, theme parks, houses and gardens;
- admissions to clubs, dances, discos, bingo;
- other miscellaneous entertainment;
- subscriptions to sports and social clubs; and
- leisure class fees.

Denbighshire Town Centres Assessment - Final Report

6.3. Leisure, entertainment and cultural expenditure has been projected to 2028, 2033 and 2038 adopting Experian’s recommended leisure expenditure growth rates (Retail Planning Briefing Note 20 – February 2023). Taking population growth into account leisure expenditure is projected to increase by 16% from £26.72 million in 2023 to £30.97 million in 2038.

6.4. Not all leisure/cultural spend from study area residents is spent in Denbighshire. The household survey results have been adopted to estimate the household participation rates and the retention of leisure trips within the study area, as shown in Table 6.1.

Table 6.1 Leisure, entertainment and cultural participation and trip retention (% of households in Denbighshire)

Activity	% households participating	% trips retained in Denbighshire
Cinema	45.5	61.4
Theatre	40.3	34.6
Nightclubs / live music venues	16.1	45.7
Bingo	9.8	83.8
Gyms / health and fitness club	21.2	92.4
Indoor / soft play	14.3	70.5
Tenpin bowling / gaming	14.6	46.2
Trampoline parks	7.5	0.0
Museums / art galleries	32.4	16.2

Source: NEMS household survey results September 2023

Denbighshire Town Centres Assessment - Final Report

- 6.5. Less than 11% of households do not participate in any of the nine leisure activities explored by the household survey. The participation and retention rates vary significantly for each activity. Many residents travel outside Denbighshire for some leisure activities. The retention rate is highest for trips to health/fitness, bingo, indoor play and cinemas but much lower for museums/art galleries, theatre, nightclubs/live music venues and tenpin bowling.
- 6.6. The household survey results and Experian's expenditure figures suggest facilities in Denbighshire retain about 70% of leisure, entertainment and cultural expenditure within the County, which is about £18.7 million in 2023, which is projected to increase to £19.6 million in 2028, £20.6 million in 2033 and £21.7 million in 2038.
- 6.7. As indicated in Section 5, the Steam Final Trend Report for 2011 - 2022 indicates Denbighshire's tourist visitors generated direct recreation related expenditure of £38.1 million, which boasts overall available expenditure to over £64.8 million. These figures suggest tourist visitors could generate about 59% of all cultural and recreational expenditure available in Denbighshire.
- 6.8. Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by 3.9% between 2023 to 2025, 8.7% between 2023 to 2028 or 13.7% between 2023 to 2038. With population growth these projections suggest an additional +£2.7 million could be generated by 2028, or +£6.0 million by 2033, or +9.5 million in 2038 for these leisure activities in Denbighshire.
- 6.9. Based on Lichfields' experience, leisure floorspace normally trades on average around £2,500 per sq.m gross, which is projected to increase to £2,522 per sq.m gross in 2028; £2,553 per sq.m gross in 2033 and then to £2,578 per sq.m in 2038, based on Experian's projected growth in leisure sales densities.

Denbighshire Town Centres Assessment - Final Report

- 6.10. If leisure/cultural expenditure attracted to Denbighshire increased by £2.7 million by 2028; £6.0 million by 2033 and then £9.5 million in 2038, as indicated above, then this additional expenditure could support about 1,100 sq.m gross of new commercial leisure and cultural floorspace by 2028, increasing to about 2,300 sq.m gross by 2033 and then to 3,700 sq.m gross by 2038.
- 6.11. This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

Denbighshire Town Centres Assessment - Final Report

Cinemas

- 6.12. Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946, but the number of trips declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s dropping to only 54 million trips in 1984 but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips did not increase significantly between 2002 and 2019, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The UK average visitation rate was about 2.6 trips per person per annum, before the Covid crisis. The number of trips during the Covid-19 crisis reduced significantly. The latest 2022 figures indicate just over 117 million cinema trips were made in the UK (about 1.7 trips per person), still 33% below pre-Covid levels (176 million).
- 6.13. The cinema assessment for Denbighshire assumes trip levels comparable with the UK average at both post and pre-Covid levels, i.e. an average of between 1.7 and 2.6 trips per person per annum.
- 6.14. The UK Film Association identifies 846 cinema facilities with 4,637 screens and 790,000 seats in the UK in 2022. Lichfields' national CINESCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average (based on pre-Covid trips rates) was about 38,000 cinema trips per annum for each cinema screen or 190 trips per annum for each seat available.

Denbighshire Town Centres Assessment - Final Report

- 6.15. Denbighshire's population is 96,655 in 2023 and the average number of tourists is 32,400 per day. Based on the UK averages above, these 129,055 people would generate between 219,000 to 336,000 cinema trips per annum, which could theoretically support between 6 to 9 cinema screens or 1,150 to 1,770 cinema seats. However, not all cinema trips will be attracted to facilities in Denbighshire. Cinemas in Chester, Llandudno and Wrexham attract trips from Denbighshire, therefore the theoretical capacity may be lower.
- 6.16. The household survey results indicate 45.5% of Denbighshire's residents visit cinema and the Denbighshire destinations mentioned by participating respondents were:
- Vue, The Village, West Parade, Rhyl (5 screens – 601 seats);
 - Scala, High Street, Prestatyn (2 screens – 300 seats);
 - Community Hub Y Ty Gwyrd, Back Row, Denbigh;
 - Theatr Twm o'r Nant, Station Road, Denbigh; and
 - Picturehaus, Manorhaus Ruthin, Well Street, Ruthin.
- 6.17. The two main full time cinemas have 7 screens with 901 seats.
- 6.18. Based on the current cinema market share for Denbighshire (61.4%) suggested by the household survey results, Denbighshire should attract between 101,000 to 160,000 trips from residents. Tourist visitors to Denbighshire could generate between 55,000 to 87,000 trips. The total number of trips attracted to Denbighshire is estimated to be 156,000 to 247,000.
- 6.19. These trips could support 4 to 7 screens or 820 to 1,300 cinema seats based on the UK pre and post Covid average visitation rate (1.7 or 2.6 trips per person).

Denbighshire Town Centres Assessment - Final Report

6.20. The two main full-time cinemas, Vue and Scala (7 screens and 901 seats) suggest there is a reasonable balance between supply (screen/seats) when compared with demand (trips). Denbighshire's population is projected to increase from 96,655 to 98,533 by 2038, which could generate an additional 3,200 to 4,900 cinema trips. These additional trips would only support up to 25 additional cinema seats.

6.21. Existing cinema provision in Denbighshire may limit operator demand for a new facility. Furthermore, the longer-term impact of Covid-19 on the number of cinema trips may reduce this theoretical capacity if the average visitation rate does not return to the UK average of 2.6 trips per person.

Denbighshire Town Centres Assessment - Final Report

Theatres, nightclubs, live music and cultural activities

- 6.22. The household survey results indicate a relatively low proportion (less than 40%) of respondents in the study area visit theatres. Just over 38% visit museums/art galleries and only 14% visit nightclubs/live music venues.
- 6.23. The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (over 200) pre-Covid presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue was £5.7 million. The UK average attendance per performance was 545.
- 6.24. Experian's local expenditure data indicates Denbighshire generates £4.7 million on live theatre, concerts and shows in 2023, which is projected to increase to £5.5 million in 2038. Tourist visitors could generate an additional £6.5 million in 2023 increasing to £7.4 million in 2038, assuming tourists spend 140% on theatre trip compared with the resident population in 2023, which is the average for recreation activities.
- 6.25. Based on the average ticket revenue per venue (£5.7 million) the Denbighshire population and tourist visitors generates theoretical demand for about 2 venues.
- 6.26. The household survey results indicate 40.3% of Denbighshire's residents visit theatres. The Denbighshire destinations mention by participating respondents were:
- Pavilion Theatre, East Parade, Rhyl;
 - The Rhyl Little Theatre, Vale Road, Rhyl;
 - Theatr Twm o'r Nant, Station Road, Denbigh.

Denbighshire Town Centres Assessment - Final Report

- 6.27. Denbighshire's existing provision is above the theoretical demand generated by the resident population and tourist visitors.
- 6.28. The nightclub sector has struggled in recent years and has been significantly affected by the Covid pandemic. Even before Covid-19, IBISWorld (providers of global industry research) suggested these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 6.29. The household survey results suggest only 16.1% of households visit nightclubs/music venues and of these participating households only 45.7% of trips generated by Denbighshire residents are attracted to facilities in the County. About 17% of participating households are attracted to facilities in Manchester. This is a UK trend that reflects the ageing population.
- 6.30. Experian suggests leisure expenditure on admissions to clubs, dances, discos etc is only £0.6 million. Tourist visitors could boost this to £1.4 million but this low level of expenditure and outflow of trips to nightclub/live music venues in Manchester and other destinations are likely to limit demand for additional facilities in Denbighshire.
- 6.31. Experian's local expenditure data indicates Denbighshire generated £3.5 million on museums, theme parks, houses and gardens in 2023, which is projected to increase to £4.1 million in 2038, an additional £0.6 million. Tourist visitors could boost this expenditure to £8.4 million in 2023 increasing to £9.8 million in 2038, an additional 1.4 million.

Denbighshire Town Centres Assessment - Final Report

6.32. The household survey results suggest 32.4% of households visit museums/ art galleries, but of these participating households only 16.2% of trips generated by residents in Denbighshire are retained in the County. The main destinations in Denbighshire specifically mentioned by respondents in the household survey were as follows:

- Rhyl Library, Museum & One Stop Shop, Church Street, Rhyl;
- Rhuddlan Castle, Castle Street, Rhuddlan;
- 1950s Museum, Cae Dai, Denbigh;
- Denbigh Museum / Amgueddfa Dinbych, Grove Road, Denbigh;
- Nantclwyd y Dre Historic House and Gardens, Castle Street, Ruthin;
- Ruthin Craft Centre, Lon Parcwr, Ruthin;
- Ruthin Gaol Museum / Amgueddfa Carchar Rhuthun, Clwyd Street, Ruthin;
- Corwen Museum / Amgueddfa Corwen, Capel Coch, London Road, Corwen;
- Llangollen Museum, Parade Street, Llangollen; and
- The Dory Gallery, Regent Street, Llangollen.

Existing destinations not specifically mentioned by household survey respondents were:

- Prestatyn Museum of Local History, Gronant Road, Prestatyn;
- Prestatyn Roman Baths, Melyd Avenue, Prestatyn;
- Oriel Bodfari Gallery, Mold Road, Bodfari, Denbigh;
- The Carriageworks, Love Lane, Denbigh; and
- The Malt House Gallery, Brookhouse Road, Denbigh.

Denbighshire Town Centres Assessment - Final Report

6.33. Denbighshire has excellent provision of museums, galleries and other tourist attractions. The household survey results and leisure/recreation expenditure estimates suggest most of the visitors to these destinations are tourists who do not live in Denbighshire. Experian's projected growth in leisure expenditure per capita (about +13.7% between 2023 and 2038) should generate opportunities for new tourist attractions, even if the number of tourist visitors attracted to Denbighshire does not increase significantly in the future.

Health and fitness clubs

6.34. The 2019 State of the UK Fitness Industry Report revealed that the health and fitness industry was continuing to grow pre-Covid. The latest 2022 report suggests the market value is now around 2018 levels. In 2019 there were more than 10.4 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The number of members dropped to 9.9 million in 2022, with a participation rate of 14.6% compared with 15.6% in 2019. The number of clubs reduced by 176. The household survey results indicate over 21% of households visit health and fitness gyms, which is higher than the national average participation rate of less than 15%.

Denbighshire Town Centres Assessment - Final Report

6.35. The 19 fitness destinations in Denbighshire were specifically mentioned by respondents in the household survey, as follows:

- DL Fitness, Wellington Road, Rhyl;
- Rhyl Leisure Centre, Grange Road, Rhyl;
- Nova, Bastion Road, Prestatyn;
- Prestatyn Leisure Centre, Princes Avenue, Prestatyn;
- Prestatyn Sports Pitch, Roundwood Avenue, Prestatyn;
- Saints Health & Fitness, Ffordd Talargoch, Meliden, Prestatyn;
- Paul Edwards Fitness, Village Hall, A525, Trefnant;
- Warner Hotels, Castle Hotel, Bodelwyddan, Rhyl;
- X20 St Asaph Leisure Centre, Upper Denbigh Road, Saint Asaph;
- Beach Body Studio, Lenten Pool, Denbigh;
- Denbigh High School, Ruthin Road, Denbigh;
- Denbigh Leisure Centre, Clwyd Avenue, Denbigh;
- Elite Martial Arts, Colomendy Industrial Estate, Denbigh;
- Ruthin & Denbigh Gymnastics Club, Erw Las, Denbigh;
- Ruthin Leisure Centre, Mold Road, Ruthin;
- Yoga Light Centre, Market Street, Ruthin;
- Canolfan Hamdden Huw Jones - Corwen Leisure Centre, Carrog, Corwen;
- Llangollen Leisure Centre, Dinbren Road, Llangollen; and
- Verve, George Street, Llangollen.

Denbighshire Town Centres Assessment - Final Report

6.36. Other existing destinations not specifically mentioned by household survey respondents were:

- Clwydian CrossFit, Glan Aber Trading Estate, Rhyl;
- Live Life Light, Greenfield Place, Rhyl;
- Fitness HQ, Lower Denbigh Road, Saint Asaph;
- The Fitness Academy, Meliden Road, Dyserth, Rhyl;
- Vibe Den, Colomendy Industrial Estate, Denbigh; and .
- Stubbs Fitness, George Street, Llangollen.

6.37. Population growth in Denbighshire is +1,878 people between 2023 and 2038, which could support only 15 additional fitness stations by 2038, based on the UK average of about 8 fitness per 1,000 people, which could only support one small facility. This potential is based on constant participation rates, but demand for additional facilities within Denbighshire could also arise from increased participation rates.

6.38. Denbighshire's current population generates £10.8 million on subscriptions to sports and social clubs and leisure classes. With population growth this expenditure is projected to increase to £12.5 million by 2038. A 16% combined increase in population and participation could support about 120 fitness stations by 2038, which is one large or two medium sized gym facilities.

Denbighshire Town Centres Assessment - Final Report

Tenpin bowling and other indoor leisure innovations

6.39. Repurposed space in town centres has provided new opportunities for new leisure innovations. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.

6.40. The household survey results indicate 14.6% of households visit ten-pin bowling/ gaming facilities. The main tenpin bowling destinations mentioned by participating respondents in the household survey were:

- Astro Bowl, Ffrith Fun Parc Bowling, Victoria Road West, Prestatyn;
- Tenpin Cheshire Oaks, Coliseum Leisure Park, Ellesmere Port; and
- Tenpin Wrexham, Eagles Meadow Shopping Centre, Wrexham.

6.41. The facility in Prestatyn in Denbighshire have 8 lanes. Denbighshire's projected 2038 population (98,533). The household survey results suggest 46% of tenpin bowling trips are retained in the Country, which suggest a retained catchment population of about 45,500, which could theoretically support less than 4 lanes, based on the UK average of one lane per 12,000 people. However, tourist visitors should generate additional demand for about 11 lanes, based on the 140% uplift in recreational expenditure. There may be potential for a small tenpin bowling facility (5 to 8 lanes) to serve demand from tourists and an increase in Denbighshire's retention in tenpin bowling trips.

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

Denbighshire Town Centres Assessment - Final Report

6.43. Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts for all ages and abilities, as well as an arcade and party rooms.

6.44. The household survey results indicate less than 8% of respondents in Denbighshire visit trampoline centres and 14.3% visit indoor soft play facilities. Only two trampoline destinations mentioned by households participating in this activity, as follows:

- FlipOut, Chester Gates Business Park, Chester; and
- Freedome Parks, Coliseum Way, Cheshire Oaks Way, Ellesmere Port.

6.45. Indoor soft play destinations mentioned by participating households were as follows:

- Geronimo's Adventure Playground, West Parade, Rhyl;
- Ninja Tag, West Parafe, Rhyl;
- SC2 Rhyl, West Parade, Rhyl;
- Nova, Bastion Road, Prestatyn;
- Banana Ben's Play Centre & Cafe, Central Retail Park, Wrexham;
- Bonkerz Fun Centre, Llewelyn Avenue, Llandudno;
- Inflatabubble Theme Park, Old Wrexham Road, Chester;
- Infunity, Bromfield Lane Industrial Estate, Queens Lane, Mold;
- Wizz Kidz, Interlinq Trade Park, Deeside; and
- Fantastic Funhouse, Gobowen Road, Oswestry.

6.46. There may be potential scope for further trampoline and soft play provision in Denbighshire, based on projected leisure expenditure growth and a growth in participation rates. This sector is still evolving and its potential for continued growth is difficult to quantify. Denbighshire's strategy should be flexible to respond to any emerging demand for a trampoline and soft play centres.

Denbighshire Town Centres Assessment - Final Report

Bingo, games of chance and gambling

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

6.48. The Gambling Commission indicates there are 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults.

6.49. The household survey results indicate 9.8% of respondents in Denbighshire visit bingo facilities, significantly above the UK average participation rate of around 5%. Only two bingo facilities were specifically mentioned by participating households, as follows:

- Apollo Bingo, Brighton Road, Rhyl; and
- Mecca Bingo, Smithfield Road, Wrexham.

6.50. Les Harkers Amusements and Bingo, West Parade in Rhyl was not specifically mentioned by the household survey respondents.

6.51. The adult population in Denbighshire (about 82,000 in 2023). About 84% of bingo trips are retained in the County, which suggests an adult catchment population of about 70,000, which is theoretically capable of supporting less than one bingo facilities, based on the UK average. However, nearly two facilities could be supported based on Denbighshire's higher participation rate. Tourist visitors will also generate additional demand.

Denbighshire Town Centres Assessment - Final Report

6.52. There could be potential for additional bingo facilities in Denbighshire based on demand from tourist visitors, but the continued growth in online bingo and gambling may restrict operator demand, which suggests there is no need to identify a site for a new facility.

Denbighshire Town Centres Assessment - Final Report

Conclusions on commercial leisure and other town uses

6.53. The leisure, entertainment and cultural sectors are fragmented and innovative. There are many activities that could be promoted e.g. museums, art galleries, exhibition space, tourist attractions. The analysis suggests the scope for some traditional leisure activities often found in town centres may be limited e.g. cinemas and theatres, but new emerging leisure activities such as escape rooms and virtual golf centres should provide more potential. The representation of these emerging uses, in particular, is likely to increase in Denbighshire because there will be gaps in provision. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

6.54. In global terms, future expenditure growth could support new commercial leisure and cultural floorspace (cumulative) in Denbighshire of:

- about 1,100 sq.m by 2028;
- about 2,300 sq.m by 2033; or
- about 3,700 sq.m by 2038.

6.55. The mixed use Queens Market redevelopment in Rhyl is expected to provide an events hall (414 sq.m) which could include leisure and entertainment events.

Other additional leisure and entertainment floorspace could include:

- a large or two medium sized health and fitness facilities (about 120 new fitness stations in total);
- new leisure innovations e.g. trampolines, indoor climbing, escape rooms, virtual sport activities; and
- small scale tourist attractions/cultural facilities.

6.56. The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities. The opportunities to reoccupy/ redevelop vacated retail space should be considered. New leisure, entertainment facilities should be located in designated centres in line with the sequential approach.

Denbighshire Town Centres Assessment - Final Report

7. Implications for planning policy

Accommodating growth and change

7.1. For planning policies, local authorities should support the role of town centres by:

- defining a network and hierarchy of centres, allowing them to grow and diversify;
- defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations;
- allocating suitable opportunities to meet development needed;
- application of the sequential approach for development i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.

7.2. PPW acknowledges the rapid changes that are affecting town centres.

Diversification will be key to the long-term vitality and viability of town centres.

Accordingly, planning policies should clarify the range of uses permitted in such locations, as part of a positive strategy for the future of each centre. The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings as is acknowledged by PPW.

Denbighshire Town Centres Assessment - Final Report

Floorspace capacity projections

7.3. The expenditure projections in this study exclude home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) have been deducted. The assessment adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.

7.4. The assessment of the potential for new retail, food/beverage and leisure/entertainment floorspace in the previous sections suggests there is modest long-term scope for new development in Denbighshire. Tables 7.1, 7.2 and 7.3 below summarise the floorspace projections in Denbighshire up to 2028, 2033 and 2038 (cumulative).

7.5. These projections assume Denbighshire can maintain its market share of expenditure in the future and the number of tourist visitors is maintained. This approach recognises that additional development within the County could help to increase the area's market share, but this increase will be counter-balanced by development within competing centres. A balanced and sustainable approach has been adopted.

7.6. Table 7.1 indicates there is a small combined projected over-supply of floorspace in Denbighshire of -2,464 sq.m gross in 2028. By 2033, there is a positive combined cumulative requirement of 968 sq.m gross (Table 7.2), which increases to 2,980 sq.m gross in 2038 (Table 7.3). These combined cumulative floorspace capacity projections need to be considered in terms of the availability of existing vacant floorspace that may be suitable to accommodate this projected growth. The future distribution of growth also needs to be considered.

Denbighshire Town Centres Assessment - Final Report

Table 7.1 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2028 (sq.m gross)

Retail Zone	Convenience retail	Comparison retail	Food/beverage	Total
1 – Rhyl	- 351	- 249	282	-318
2 – Prestatyn	- 324	- 174	275	-223
3 – Elwy (Rhuddlan/St Asaph)	- 85	- 52	242	105
4 – Denbigh	- 161	- 45	129	-77
5 – Ruthin	- 152	- 34	190	4
6 – Dee Valley (Corwen/Llangollen)	- 70	- 26	142	46
Total	- 1,143	- 580	1,259	-464

Table 7.2 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2033 (sq.m gross)

Retail Zone	Convenience retail	Comparison retail	Food/beverage	Total
1 – Rhyl	- 284	- 336	621	1
2 – Prestatyn	- 291	- 253	601	57
3 – Elwy (Rhuddlan/St Asaph)	- 72	- 78	518	368
4 – Denbigh	- 128	- 64	277	85
5 – Ruthin	- 112	- 48	402	242
6 – Dee Valley (Corwen/Llangollen)	- 57	- 37	309	215
Total	- 944	- 816	2,728	968

Denbighshire Town Centres Assessment - Final Report

Table 7.3 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2038 (sq.m gross)

Retail Zone	Convenience retail	Comparison retail	Food/beverage	Total
1 – Rhyl	- 186	- 299	991	506
2 – Prestatyn	- 240	- 263	951	448
3 – Elwy (Rhuddlan/St Asaph)	- 47	- 77	825	701
4 – Denbigh	- 65	- 44	442	333
5 – Ruthin	- 47	- 24	637	566
6 – Dee Valley (Corwen/Llangollen)	- 35	- 33	494	426
Total	-621	- 739	4,340	2,980

Source: Tables 5.5, 5.7 and 5.9.

Denbighshire Town Centres Assessment - Final Report

Retail allocations in the Adopted Denbighshire Development Plan

7.7. The adopted Denbighshire Local Development Plan 2016 – 2021 (June 2013) identified four allocations for new retail development (Policy PSE 7) on the proposals map, as follows:

- Rhyl – High Street/Queen Street: predominantly non-food retailing, leisure and offices;
- Prestatyn – Town centre redevelopment: mixture of food and non-food retailing;
- Denbigh – Station Yard site: mixture of food and non-food retailing;
- Llangollen – Dobson & Crowther site: food retailing.

7.8. The Prestatyn and Denbigh allocations have been implemented with the development of the Parc Prestatyn Shopping Park and Denbigh Retail Park. The Llangollen allocation is now occupied by an Aldi discount food store.

7.9. The redevelopment of Queens Market in Rhyl is now under-construction for mixed uses including a food and market hall, Class C3 (residential apartments), Class A1 (retail), Class A2 (financial and professional), Class A3 (food and drink), Class B1 (Offices), Class D1 (non-residential), Class D2 (assembly and leisure). The Market Hall Class A1/A3 has a floor area of 975 sq.m. Other commercial food/beverage, retail, assembly and leisure (Class A1/A3/D2) could provide up to 1,804 sq.m. Retail and food/beverage uses in this development could exceed the 2038 long-term combined floorspace projection for Rhyl, Prestatyn, Rhuddlan and St Asaph (a net combined requirement of 1,655 sq.m gross).

7.10. There is no need to allocate further major retail/food beverage development sites in the County. The priority should be the reoccupation of vacant shop units within town centres.

Denbighshire Town Centres Assessment - Final Report

Vacant shop premises

7.11. The existing stock of premises should help to accommodate any residual projected growth. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shop premises should help to accommodate future growth.

7.12. The Council's latest land use survey (2023) indicates there were 210 vacant shop units in the main town centres in Denbighshire, an average shop vacancy rate of 22.3%, which is significantly higher than the UK average (14.5%). The total amount of vacant floorspace could be in the region of 10,000 sq.m gross, based on an average of 50 sq.m gross per vacant unit.

7.13. It may be reasonable and desirable to assume Denbighshire's town centre shop unit vacancy rate will reduce to the UK average as a minimum and down to 10% in Prestatyn. If achieved, this reduction in the shop unit vacancy rate could theoretically accommodate about 4,200 sq.m of new uses, which exceeds the projected combined retail and food/beverage floorspace under-supply up to 2038 (2,980 sq.m gross). On this basis, reoccupied vacant floorspace could be distributed as follows:

- Rhyl town centre 2,400 sq.m gross;
- Prestatyn town centre 200 sq.m gross;
- Denbigh town centre 700 sq.m gross;
- Ruthin town centre 300 sq.m gross;
- St Asaph centre 300 sq.m gross;
- Corwen centre 200 sq.m gross; and
- Rhuddlan centre 100 sq.m gross.

Denbighshire Town Centres Assessment - Final Report

- 7.14. The floorspace projections up to 2038 and current level of vacant floorspace suggest there is no quantitative need to increase the combined amount of retail and food/beverage floorspace in Denbighshire over the plan period. However, there is likely to be a shift from retail to food/beverage uses, with some vacant shop premises also converting to these uses.
- 7.15. The capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail development to accommodate projected growth over the plan period. The priority will be the reoccupation of vacant shop units, potentially for non-retail uses including food/beverage outlets, leisure, entertainment and cultural uses. However, the combined floorspace projections suggest there is still a need to retain most of the existing stock of shop premises within most centres.
- 7.16. The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

Denbighshire Town Centres Assessment - Final Report

Zone 1 – Rhyl

- 7.17. In Zone 1 the global floorspace projection is 506 sq.m gross in 2038. As indicated above, the Queens Market redevelopment will provide a Market Hall (Class A1/A3) of 975 sq.m and other commercial food/beverage, retail, assembly and leisure (Class A1/A3/D2) could provide up to 1,804 sq.m. Retail and food/beverage uses in this development could exceed the 2038 combined floorspace projection for Rhyl, Prestatyn, Rhuddlan and St Asaph.
- 7.18. The shop vacancy rate in Rhyl town centre is 29.4% (96 vacant units). If the vacancy rate fell to 14.5% (the UK average) then 48 units could be reoccupied and could accommodate about 2,400 sq.m gross, which is sufficient to accommodate the combined floorspace capacity projection up to 2038 (506 sq.m gross), notwithstanding the Queens Market redevelopment. There is potential for Rhyl to increase its market share of retail, food/beverage and leisure expenditure.
- 7.19. The priority for Rhyl town centre should be successful implementation of the Queens Market development and the re-occupation of vacant floorspace for a mix of retail, food/beverage and leisure/cultural uses. Vacant units are spread throughout the centre and there are no obvious areas on the periphery that could be excluded from the town centre boundary.
- 7.20. There may be potential to transfer surplus capacity from other destinations in the County i.e. from Prestatyn, Rhuddlan and St Asaph, which have a combined capacity requirement of 1,149 sq.m gross. The catchment areas of these centres overlap to a significant extent. To safeguard this potential transfer of capacity from other parts of the County no contraction of the Rhyl town centre boundary is recommended despite the higher vacancy rate.

Denbighshire Town Centres Assessment - Final Report

Zone 2 – Prestatyn

7.21. The Zone 2 global floorspace projection is 448 sq.m gross in 2038. The shop vacancy rate in Prestatyn town centre is 12.5% (21 vacant units), which is below the UK average. Nevertheless, there is scope to accommodate some, if not all, of the floorspace capacity projection in 2038. Alternatively, some surplus capacity could be accommodated in Rhyl where the shop vacancy rate is much higher.

7.22. The Prestatyn town centre boundary is relatively tightly drawn around shop and service uses. The capacity projections and relatively low vacancy rate suggest no contraction of the town centre boundary is necessary.

Zone 3 – Elwy (Rhuddlan/St Asaph)

7.23. The Zone 3 global floorspace projection is 701 sq.m gross in 2038. The shop vacancy rate in Rhuddlan is 20% (9 vacant units) and the vacancy rate in St Asaph is 35.1% (13 units). If the vacancy rate fell to 14.5% (the UK average) then 8 units could be reoccupied and could accommodate about 400 sq.m gross, which is sufficient to accommodate over half of the combined floorspace capacity projection up to 2038. Alternatively, some surplus capacity could be accommodated in Rhyl.

7.24. The Rhuddlan and St Asaph centre boundaries are relatively tightly drawn around shop and service uses. Vacant units are spread throughout the centres and there are no obvious areas on the periphery that could be excluded from the centre boundaries.

Denbighshire Town Centres Assessment - Final Report

Zone 4 – Denbigh

7.25. The Zone 4 global floorspace projection is 333 sq.m gross in 2038. The shop vacancy rate in Denbigh is 29.2% (28 vacant units). If the vacancy rate fell to 14.5% (the UK average) then 14 units could be reoccupied and could accommodate about 700 sq.m gross, which exceeds the combined floorspace capacity projection up to 2038. The priority for Denbigh town centre should be the re-occupation of vacant floorspace. No contraction of the centre boundary is required.

Zone 5 – Ruthin

7.26. The Zone 5 global floorspace projection is 566 sq.m gross in 2038. The shop vacancy rate in Ruthin is 19.2% (25 vacant units). If the vacancy rate fell to 14.5% (the UK average) then 6 units could be reoccupied and could accommodate about 300 sq.m gross, which could accommodate about half the combined floorspace capacity projection up to 2038. Alternatively, some surplus capacity could be accommodated in Denbigh where the shop vacancy rate is higher.

7.27. Shop and service uses in Ruthin are relatively fragmented and the centre boundary is relatively widely drawn to include and protect these uses. The capacity projections suggest no contraction of the town centre boundary is necessary.

Denbighshire Town Centres Assessment - Final Report

Zone 6 – Dee Valley (Corwen/Llangollen)

7.28. The Zone 3 global floorspace projection is 426 sq.m gross in 2038. The shop vacancy rate in Corwen is 28.9% (10 vacant units) and the vacancy rate in Llangollen is 7.8% (8 units). If the vacancy rate fell to 14.5% (the UK average) then 4 units could be reoccupied in Corwen and could accommodate about 200 sq.m gross, which is sufficient to accommodate half of the combined floorspace capacity projection up to 2038.

7.29. The Corwen and Llangollen centre boundaries are tightly drawn and exclude some peripheral shop and service uses. The capacity projections suggest no contraction of the centre boundaries is necessary.

Denbighshire Town Centres Assessment - Final Report

Hierarchy of centres

7.30. PPW (4.3.10) requires planning authorities to establish a retail and commercial hierarchy within their development plan strategy. Paragraph 4.3.12 goes onto say that planning authorities should:

"take account of the size, scale, form, function and location of the retail and commercial centres within an area [and]...should consider the characteristics of each type of centre so they can be consistently categorised."

7.31. Paragraph 4.3.12 goes onto say that the retail and commercial hierarchies,

"should distinguish between higher order centres which have a wider range of uses and larger catchment areas, and lower order centres which are important to communities for day-to-day needs."

7.32. The analysis in Section 3 and shopping patterns established by the household survey results confirm Rhyl and Prestatyn town centres are the main centres in the County at the top of the hierarchy and can be designated as Principal Centres, as proposed in the emerging Local Development Plan. The base year (2023) combined retail and food/beverage turnover of facilities in Rhyl is about £226 million and the turnover of Prestatyn is £179 million, which is more than double the next highest destination in the County. Rhyl and Prestatyn are similar in size and turnover and should be designated at the same position in the shopping hierarchy, as proposed in the emerging new Local Development Plan. Rhyl and Prestatyn town centres are the only centres that attract significant levels of comparison goods retail trade from across the County.

Denbighshire Town Centres Assessment - Final Report

7.33. Ruthin, Denbigh and Llangollen are the next largest town centres with between 96 to 130 shop units. Their combined retail and food/beverage turnovers are much lower than Rhyl and Prestatyn. Ruthin and Denbigh have combined turnovers of just over £74 million, whilst Llangollen's turnover is only £40 million. These centres should be designated as the second tier Town Centres in the County as proposed in the emerging new Local Development Plan.

7.34. The other three centres assessed in Denbighshire are much smaller, ranging from 35 to 45 shop units. Their combined retail and food/beverage turnovers range from about £6 million to £26 million. These centres should be designated as Local Centres, as proposed in the new Local Development Plan.

7.35. The recommended hierarchy of centres is shown in Table 7.4.

Table 7.4 Potential Denbighshire Hierarchy of Centres

Centre	Proposed status
Rhyl	Principal Centre
Prestatyn	Principal Centre
Denbigh	Town Centre
Llangollen	Town Centre
Ruthin	Town Centre
Corwen	Local Centre
Rhuddlan	Local Centre
St Asaph	Local Centre

Denbighshire Town Centres Assessment - Final Report

Town centre boundaries and shopping frontages

7.36. The designation of town and local centre boundaries is important when applying the sequential approach, to direct retail and town centre uses to sustainable locations and determining whether a retail need/impact assessment is required.

7.37. PPW (4.3.10) recommends that planning authorities identify the boundaries of retail and commercial centres within their development plan strategy. PPW (4.3.31) states,

"primary areas are typically characterised by a high proportion of A1 retail uses, and their designation requires an understanding of the existing distribution of uses in a centre together with careful consideration of a centre's role and how it relates to the retail strategy for the area. Secondary areas typically contain mixed uses."

7.38. PPW (4.3.35) recognises that where the right balance of use and activity is not being achieved, local planning authorities should consider making changes to the acceptable uses in primary or secondary areas, or the retail and commercial centre boundaries themselves. PPW (4.3.37) also recognises that where regeneration initiatives are unsuccessful within retail and commercial centres or the periphery of a retail and commercial centre has been assessed as being in decline by the planning authority, changes to the retail and commercial centre boundary may be appropriate.

7.39. PPW (4.3.36) also states:

"where economic decline is impacting on a retail and commercial centre, emphasis on retaining A1 uses in premises either in primary or secondary areas, which have been vacant for a period of time, may undermine a centre's viability and vitality. In such circumstances planning authorities should consider how non-A1 uses may play a greater role to increasing diversity and reducing vacancy levels."

Denbighshire Town Centres Assessment - Final Report

- 7.40. The wording of PPW should be acknowledged in the context of the increasing diversification of town centres as identified in Building Back Better and the recent consultation on town centre permitted development rights.
- 7.41. Taking the above into consideration, the low floorspace capacity projections and high level of vacant floorspace suggest there is no requirement to expand town centre boundaries in Denbighshire to accommodate additional retail or leisure floorspace. The contraction of centres could be considered where there are concentration of vacant units on the periphery of centres. Despite the high shop vacancy rate in some centres, vacant units are evenly spread through the centres and there are no obvious peripheral areas that could be easily excluded from the town centre boundary.
- 7.42. The need to define separate primary and secondary frontages within town centre boundaries also need to be considered. The floorspace capacity projections suggest Class A1 retail uses should continue to be retained and focused within town centres, but some degree of diversification is required to accommodate growth in the food/beverage and leisure sectors and to help reduce the high level of shop vacancies in some centres.
- 7.43. Policy PSE 8 (Development within town centres) in the adopted Local Development Plan supports development in town centres that enhances the vitality and viability of the town centre and where they do not result in an unacceptable imbalance of retail and non-retail uses. Within the Primary Shopping Frontage (PSF) of Rhyl town centre changes of use of ground floor retail premises (A1 shops) to any other use class will be resisted.

Denbighshire Town Centres Assessment - Final Report

7.44. The PSF in Rhyl includes only about 20% of shop units in the town centre. The Rhyl PSF includes the High Street between West Parade and Russell Road and the White Rose Shopping Centre. The shop vacancy rate in the PSF is 18.6%, lower than the average (29.4%) for Rhyl town centre as a whole, but higher than the UK average. The proportion of Class A1 units is relatively high at 84% of occupied units. The PSF designation could be deleted in the new development plan to allow more diversification and tackle the relatively high vacancy rate.

7.45. For future policies, there are four broad policy approaches that could be adopted, as follows:

- strengthening shop frontages policies within new policy to provide more control over the loss of Class A1 retail uses. This could involve extending the areas of protected frontages and/or imposing maximum threshold for non-retail uses;
- retaining the current policies that seek to control the extent of non-retail uses within centres and designated frontages in Rhyl;
- relaxing current frontages policies to allow a more flexible approach to enable more non-retail uses. This could involve removing the areas of protected frontage in Rhyl;
- a laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses within town centres.

7.46. PPW indicates that policies can make clear the role of primary and secondary areas in town centres and primary shopping areas. A balanced mix of uses will be required in town centres. There is a reasonable degree of flexibility for local authorities to take account local circumstances during the plan making process, and in this respect the PPW is not prescriptive.

7.47. The suitability of the approach in Denbighshire needs to be considered in the context of recent changes in the mix of uses within centres, the floorspace projections and levels of vacant units.

Denbighshire Town Centres Assessment - Final Report

7.48. Less restrictive policies (see 3 or 4 above) could be introduced to encourage non-Class A1 and other town centre uses to reoccupy vacant units and/or to regenerate rundown areas. The need to retain the existing, or a more restrictive approach (see 1 and 2 above) is less clear, due to the need to:

- diversify the attraction of town centres to include uses other than shopping to attract customers throughout the day and evenings;
- reduce high shop vacancy rates; and
- the reduced projected need for new retail floorspace over the plan period.

7.49. The introduction of more restrictive shop frontage policies (see 1 above) appears to be inappropriate, as it could lead to a further increase in vacant units, because demand for Class A1 retail occupiers is unlikely to exceed supply (vacant units). A laissez fair approach (see 4 above) could undermine the retail and commercial role of some centres. If the current level of Class A1 use continues to reduce significantly in town centres, then this approach is likely to undermine their role and viability. However, the high vacancy rates suggest a less rigid approach to use class mix for the centres should be considered (see 3 above). For example, the deletion of the PSF could be considered in Rhyl, as suggested above.

7.50. Policy PSE 8 provides a reasonable level of control because development in town centres should enhance the vitality and viability of the centre, but the creation of an unacceptable imbalance of retail and non-retail uses is more subjective and difficult to quantify. The Council could consider introducing new policy criteria for development in town centres relating to retaining active frontages and preventing amenity issues such as noise, traffic and odours.

Denbighshire Town Centres Assessment - Final Report

Impacts and sequential tests

7.51. Policy PSE 6 (retail economy) of the Adopted Local Development Plan seeks to direct new retail development to defined town centres in the first instance, provided they are of a scale and type appropriate to the size, character and function of the centre. The adopted Local Development provides limited guidance on how the impact of retail developments will be assessed.

7.52. PPW provides guidance on the need to assess retail impact. It states:

"All retail planning applications or retail site allocations of 2,500 sq. metres or more gross floorspace that are proposed on the edge of, or outside designated retail and commercial centres should, once a need has been established, be supported by a retail impact assessment.

For smaller retail planning applications or site allocations, planning authorities will need to determine whether an assessment is necessary, for example when a smaller proposal may have a significant impact on a centre. Requests for retail impact assessments by planning authorities on smaller developments should be proportionate to potential impacts."

7.53. The sequential test this is also set out clearly in PPW and Future Wales. However, Policy 6 of Future Wales goes further than PPW with regards to the sequential test as it states that 'significant new commercial, retail, education, health, leisure and public service facilities must be located within town and city centres'. The supporting text of this policy explains that this policy applies to developments of a significant scale, which can broadly be defined as where the facility will serve a town, city or region-wide catchment. However, it is up to local authorities to determine whether a development is of a significant scale.

Denbighshire Town Centres Assessment - Final Report

7.54. This policy reflects the key messages from the Welsh Government about the need for town centres to be more than just retail and to be truly mixed-use areas that provide the local facilities and services that people want in their local community. In terms of how this policy is applied, each development should be assessed on its own merit against a set of criteria that could be established in the development plan including matters such as:

- the quantum and nature of the use;
- is the use acceptable in the town centre without having an unacceptable impact on existing operators and residents; and
- are there specific reasons why a use cannot locate in the town centre.

7.55. It will be up to the applicant to provide robust justification as to why proposed town centre uses cannot locate within the town centre. A sequential approach should be followed to ensure that the benefits of the use can be realised within or as close as possible to the town centre. This policy is key to ensuring that town centres are integrated with day to day uses and this provides the opportunity to meet placemaking and sustainability policies set out in Future Wales and PPW. However, pragmatism will be required where there is a development proposal that clearly needs to be located outside the town centre. The social and economic benefits of a proposal should not be dismissed just because there is a lack of sites in and on the edge of town centres and in some circumstances the use will not be appropriate in that location. In instances such as this it will be important to ensure that the sites are able to be reached via sustainable modes of transport including walking and cycling. For the smaller centres it will be important to balance the overall benefits of the proposal being located outside of the town centre.

Denbighshire Town Centres Assessment - Final Report

Retail and service provision outside of town centres

7.56. Policy PSE 9 (out-of-centre retail development) permits small scale retail uses up to 500 sq.m gross outside town centres but within development boundaries, where they serve the local area and do not jeopardise the vitality and viability of town centres. Related to this, Policy PSE 10 (local shops and services) supports new or expanded local shops and services within settlements provided they satisfy Policy PSE 9. Policy PSE 10 also seeks to protect existing shops and services unless they are no longer financially viable and other marketing criteria have been met.

7.57. Policy PSE 5 (rural economy) supports the rural economy including agricultural diversification. This diversification could presumably include new shops and services, but this policy is not cross-referenced with Policies PSE 9 and PSE 10.

7.58. If these policies are carried forward in the new development plan, then all new shops, services and leisure development outside of town centres, including diversification in rural areas should not jeopardise the vitality and viability of designated centres and should serve the local area.

Denbighshire Town Centres Assessment - Final Report

8. Summary and conclusions

8.1. This section draws together the analysis set out in previous sections and provides strategic recommendations for Denbighshire. It explores how any identified growth could be accommodated and the future role of the main town centres.

Hierarchy of centres

8.2. The analysis of the hierarchy of centres indicates Denbighshire has a well-established network of centres that currently serve their respective areas. Rhyl and Prestatyn are the largest centre at the top of the hierarchy. Ruthin, Denbigh and Llangollen are the next largest town centres, but their shopping roles are less significant than Rhyl and Prestatyn in terms of the number of comparison goods outlets, floorspace and the extent of their catchment areas. The other town centres in Denbighshire are much smaller and have local catchment areas. They have limited comparison goods retail provision and top-up rather than main food and grocery shopping provision. The recommended hierarchy of centres is shown in Table 8.1.

Table 8.1 Potential Denbighshire Hierarchy of Centres

Centre	Proposed status
Rhyl	Principal Centre
Prestatyn	Principal Centre
Denbigh	Town Centre
Llangollen	Town Centre
Ruthin	Town Centre
Corwen	Local Centre
Rhuddlan	Local Centre
St Asaph	Local Centre

Denbighshire Town Centres Assessment - Final Report

8.3. The average shop vacancy rate in Denbighshire is over 22%, which is much higher than the UK average (14.5%). Prestatyn (12.5%) and Llangollen (7.8%) are the only centres with a shop vacancy below the UK average.

8.4. Most of the main centres have a reasonable mix of retail and non-retail service uses, but the smaller centres generally have a lower proportion of comparison goods retail units than the UK average. The smaller centres tend to have lower proportions of retail uses and higher levels of hot-food takeaways and other non-retail services.

8.5. The household survey results suggest a relatively high levels of expenditure retention within Denbighshire for both convenience and comparison goods shopping and food/beverage (Class A3 uses). The retention of comparison goods expenditure is slightly lower due to the draw of larger centres, primarily in Chester and Wrexham. However, the results suggest good levels of expenditure retention for both higher and lower order comparison goods, particularly in the north half of the County. The high level of existing expenditure retention suggests there is limited potential for Denbighshire to increase its market share of retail expenditure.

Denbighshire Town Centres Assessment - Final Report

Convenience goods retail

8.6. The projections indicate there will be a convenience goods expenditure deficit of -£9.91 million at 2028, because population and expenditure growth will be offset by an increase in home shopping (SFT) and increases in sales densities.

8.7. This expenditure deficit is projected to decrease to -£8.19 million at 2033 and continued population growth reduces the deficit to -£5.39 million at 2038. These projections suggest there is no capacity for additional convenience goods floorspace for the foreseeable future. However, there could be a qualitative need to improve local shopping provision in rural areas.

8.8. The deficit expenditure projections suggest an over-supply of convenience goods floorspace in Denbighshire of 1,143 sq.m gross in 2028 but decreasing to only 621 sq.m gross by 2038.

8.9. Collectively, the main town centres in Denbighshire have 61 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. Residents in most parts of the County have good access to a range and choice of food stores. The most obvious areas of deficiency in food store provision is the rural areas in the south. However, the settlements in these areas are probably too small to sustain a large food store.

Denbighshire Town Centres Assessment - Final Report

Comparison goods retail

8.10. The projections an expenditure deficit of -£2.81 million in 2028, which will increase to -£4.51 million by 2033 and -£4.69 million in 2038. These projections suggest growth in turnover densities will absorb expenditure growth and there is likely to be an over-supply of comparison goods retail floorspace up to 2038. These projections suggest there is no capacity for additional comparison goods retail floorspace in Denbighshire for the foreseeable future. The implied over-supply of floorspace is 580 sq.m gross in 2028, which will increase marginally to 739 sq.m gross by 2038.

8.11. Collectively main town centres in Denbighshire have 256 comparison goods outlets including national multiple retailers, but mostly small independent shops in the smaller centres. Nearly 57% of the comparison goods outlets are concentrated in Rhyl and Prestatyn. The remaining provision is relatively dispersed and most shopping destinations provide a limited range and choice of comparison shops. Parts of Denbighshire are also served by Chester and Wrexham. These larger centres and relatively high expenditure retentions rates will limit the potential for Denbighshire to increase its market share of comparison goods expenditure and reduce expenditure leakage.

Denbighshire Town Centres Assessment - Final Report

Food and Beverage

8.12. There is a projected expenditure surplus of £7.62 million in 2028. Population and expenditure growth increases this expenditure surplus to £16.71 million at 2033 and £26.85 million by 2038. These figures suggest capacity for 1,259 sq.m gross in 2028, increasing to 2,728 sq.m gross by 2033 or 4,340 sq.m gross in 2038.

8.13. Food/beverage outlets total 157 units in the main town centres. These facilities are distributed throughout the designated centres, but the main concentrations are in Rhyl town centre (44 outlets), Prestatyn (32 outlets) and Llangollen (28 outlets). The other centres have a reasonable choice of food/beverage outlets. The growth projections suggests there is potential to improve evening economy related food/beverage uses.

Commercial leisure and other town centre uses

8.14. The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are many other activities that could be promoted e.g. nightclubs, museums, art galleries, exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. The representation of these emerging uses is relatively limited in Denbighshire. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

Denbighshire Town Centres Assessment - Final Report

8.15. In global terms future expenditure growth and increase retention could support about 3,700 sq.m of new commercial leisure and cultural floorspace in Denbighshire by 2038. This additional floorspace could include:

- a large or two medium sized health and fitness facilities (about 120 new fitness stations);
- new leisure innovations e.g. trampolines, indoor climbing, escape rooms and virtual sport activities; and
- small scale tourist attractions/cultural facilities.

8.16. Along with the projected need for additional food/beverage floorspace, the potential for new commercial leisure and cultural uses provides an opportunity to enhance the evening and night-time economy within Denbighshire. The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

Denbighshire Town Centres Assessment - Final Report

Accommodating Growth

8.17. Based on latest land use data there are 210 vacant shop units within Denbighshire's main centres, an average vacancy rate of 22.3%, which is significantly above the UK (14.5%). The total amount of vacant floorspace in the main centres could be about 10,000 sq.m gross. It is reasonable to assume the number of vacant units could reduce in line with the UK average, i.e. to a lower vacancy rate of 14.5%. This reduction in the shop vacancy rate could accommodate about 4,000 sq.m gross of new uses, which could meet most of the projected floorspace capacity figures. However, there is likely to be a shift in retail space to food/beverage and leisure/cultural uses, with some vacant shop premises also converting to these uses. Not all vacant shop units will be suitable for conversion to leisure/cultural uses, therefore new development may be required to accommodate new uses.

8.18. The floorspace projections suggest there is no need to identify development site allocations to accommodate new floorspace. In many cases there is a negative floorspace projection which may lead to an increase in vacant shop units. The requirement for new food/beverage uses could be accommodated in vacant shop units.

Denbighshire Town Centres Assessment - Final Report

Town centre boundaries and shopping frontages

- 8.19. Development plans should define clear boundaries for town and local shopping centres on the Proposals Map, which is important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required.
- 8.20. The retail floorspace capacity projections and the high number of vacant units in some centres suggest there is no need to significantly extend centre boundaries to accommodate future growth. However, there are no obvious peripheral areas where a concentration of vacant premises could be excluded from the town centre boundaries.
- 8.21. The floorspace capacity projections suggest Class A1 retail uses should continue to be retained and focused within town centres, but some degree of diversification is required to accommodate growth in the food/beverage and leisure sectors and to help reduce the high level of shop vacancies in some centres. The introduction of less restrictive shop frontage policies in Rhyl is recommended, to avoid a further increase in vacant units, because demand from retail and other town centre occupiers is unlikely to exceed supply (vacant units). The Council should consider a less more flexible approach, but also the introduction of new policy criteria for development in town centres relating to retaining active frontages and preventing amenity issues such as noise, traffic and odours.

Denbighshire Town Centres Assessment - Final Report

Future Monitoring

8.22. The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development management decisions. The study provides a broad overview of the potential need for further retail, food/beverage and leisure development in the short, medium and longer term forecast up to 2038. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections should be treated with caution.

8.23. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

8.24. These key inputs into the retail capacity assessment can be amended to provide revised capacity projections as and when required.

Denbighshire Town Centres Assessment - Final Report

Appendix 1 Denbighshire retail zones

Denbighshire Town Centres Assessment - Final Report

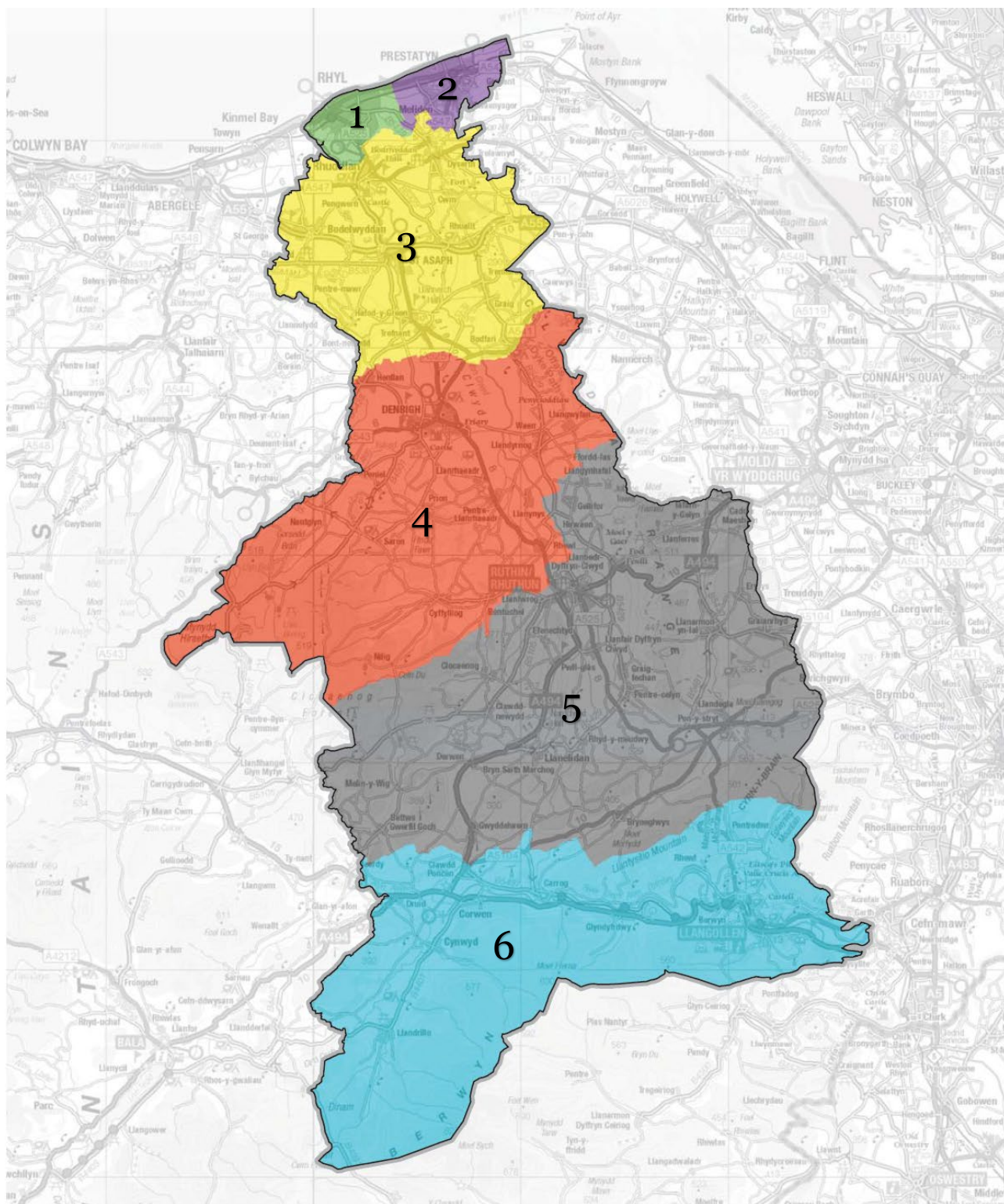
Table 1 Study Area Retail Zones and Wards

Retail Zone	Wards
1. Rhyl	W05001350 - Rhyl East
	W05001351 - Rhyl South
	W05001352 - Rhyl South West
	W05001353 - Rhyl Trellewelyn
	W05001354 - Rhyl Newydd
	W05001355 - Rhyl West
2. Prestatyn	W05001344 - Prestatyn Central
	W05001345 - Prestatyn East
	W05001346 - Prestatyn Meliden
	W05001347 - Prestatyn North
	W05001348 - Prestatyn South West
3. Elwy	W05001333 - Bodelwyddan
	W05001336 - Dyserth
	W05001349 - Rhuddlan
	W05001357 - St Asaph East
	W05001358 - St Asaph West
	W05001359 - Trefnant
W05001360 – Tremeirchion	

Denbighshire Town Centres Assessment - Final Report

Retail Zone	Wards
4. Denbigh	W05001334 - Denbigh Caledfryn Henllan
	W05001335 - Denbigh Lower
	W05001342 - Llanrhaeadr Yng Nghinmeirch
	W05001349 – Llanddymog
5. Ruthin	W05001332 - Alyn Valley
	W05001338 - Efenechchtyd
	W05001340 - Llanfair Dyffryn Clwyd Gwyddelwern
	W05001343 - Moel Famau
	W05001356 – Ruthin
6. Dee Valley	W05001337 - Edeirnion
	W05001341 - Llangollen

Denbighshire Town Centres Assessment - Final Report



Denbighshire Town Centres Assessment - Final Report

Appendix 2 Audit of Centres

Denbighshire Town Centres Assessment - Final Report

Rhyl town centre



Rhyl town centre was designated as a Principal Centre in the Denbighshire LDP – Preferred Strategy (2023). It has 326 retail and service units, and the mix of uses is set out in Table 1, which is compared with the Denbighshire and UK averages. A more detailed breakdown of non-retail services is shown in Table 2. The mix of uses in Rhyl broadly reflects the Denbighshire average, although the centre has a slightly higher proportion of comparison retailers compared with the County and UK averages, despite the higher vacancy rate. There is a relatively low provision of convenience goods shops, food/beverage uses and other non-retail services.

Denbighshire Town Centres Assessment - Final Report

Table 1 Mix of retail and service uses - Rhyl town centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Class A1 – Comparison retail	102	31.3	27.2	28.8
Class A1 – Convenience retail	15	4.6	6.5	9.8
Class A2 – Financial / Professional	21	6.4	7.3	8.8
Class A3 – Restaurant / Café	19	5.8	8.6	10.4
Class A3 – Public house / Bar	10	3.1	3.3	5.1
Class A3 – Hot food takeaway	15	4.6	4.8	6.4
Other non-retail services	48	14.7	19.9	16.2
Vacant units	96	29.4	22.3	14.5
Total	326	100.0	100.0	100.0

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

Rhyl has a good range and choice of comparison goods shops (102), the highest of all the centres in Denbighshire. There were 96 vacant units within the centre at the time of the Council’s 2023 land use survey, equating to a shop vacancy rate of 29.4%, which is higher than the County average and much higher than the UK average. The high vacancy rate suggests the supply of shop premises currently exceeds operator demand.

The household survey results suggest that 12.4% of households do most of their non-food shopping in Rhyl town centre, the second highest in the County behind Prestatyn. The relatively high comparison goods shop provision and market share are consistent with the centre’s classification as a Principal Centre at the top of the hierarchy in Denbighshire.

Denbighshire Town Centres Assessment - Final Report

Table 2 Mix of non-retail service uses - Rhyl town centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Restaurant / café	19	21.1	25.2	24.6
Hot food takeaway	15	16.7	14.0	11.4
Public house / bar	10	11.1	9.7	22.0
Bank / other financial service	9	10.0	8.4	11.3
Betting shop / amusement	4	4.4	2.8	6.7
Estate agent / valuer	7	7.8	7.2	6.2
Travel agent	2	2.2	1.9	1.1
Hairdresser / beauty parlour	24	26.7	30.2	15.5
Launderette / dry cleaner	0	0.0	0.6	1.1
Sub-total	90	100.0	100.0	100.0
Other non-retail services	23			
Total	113			

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

Rhyl has a good range and choice of non-retail services (113) as shown in Table 2. There is a good provision of hot food takeaways and hairdressers/beauty parlours, but a relatively low proportion of restaurant/café and public houses/bars – although the latter is consistent with the County average. There is a reasonably good mix of national multiples, as set out in Table 3, and small independent stores.

Denbighshire Town Centres Assessment - Final Report

Table 3 Multiple retailers – Rhyl town centre

Comparison	Convenience	Food and Beverage
B&M Home Store	Aldi	Costa Coffee
Bodycare	Asda	Domino's
Boots	Co-op	Greggs
British Heart Foundation	Farmfoods	KFC
Card Factory	Heron Frozen Foods	McDonald's
CEX	Iceland	Subway
EE	Morrisons	
Game	Sainsbury's	
Home Bargains		
H Samuel		
JD Sports		
Matalan		
Mind		
New Look		
O2		
Poundland		
Poundstretcher		
Savers		

Denbighshire Town Centres Assessment - Final Report

Comparison

Convenience

Food and Beverage

Scrivens Opticians

Sense

Shoe Zone

Specsavers

Sports Direct

The Fragrance Shop

The Salvation Army

The Works

Timpson

Vodafone

WHSmith

Source: Denbighshire Land Use Survey January 2023.

Denbighshire Town Centres Assessment - Final Report

As part of the household survey, respondents were asked if they had used shops and services in Rhyl town centre in the last 12 months. Over 57% of respondents in Denbighshire had visited Rhyl town centre, which was the second highest figure in the County. Of those who had used shops/services in Rhyl town centre, respondents were asked what they like about the town centre and what improvements would make them visit the centre more often. The main factor liked about the town centre was 15.1% mentioning that it was close to home. The other main factors mentioned were:

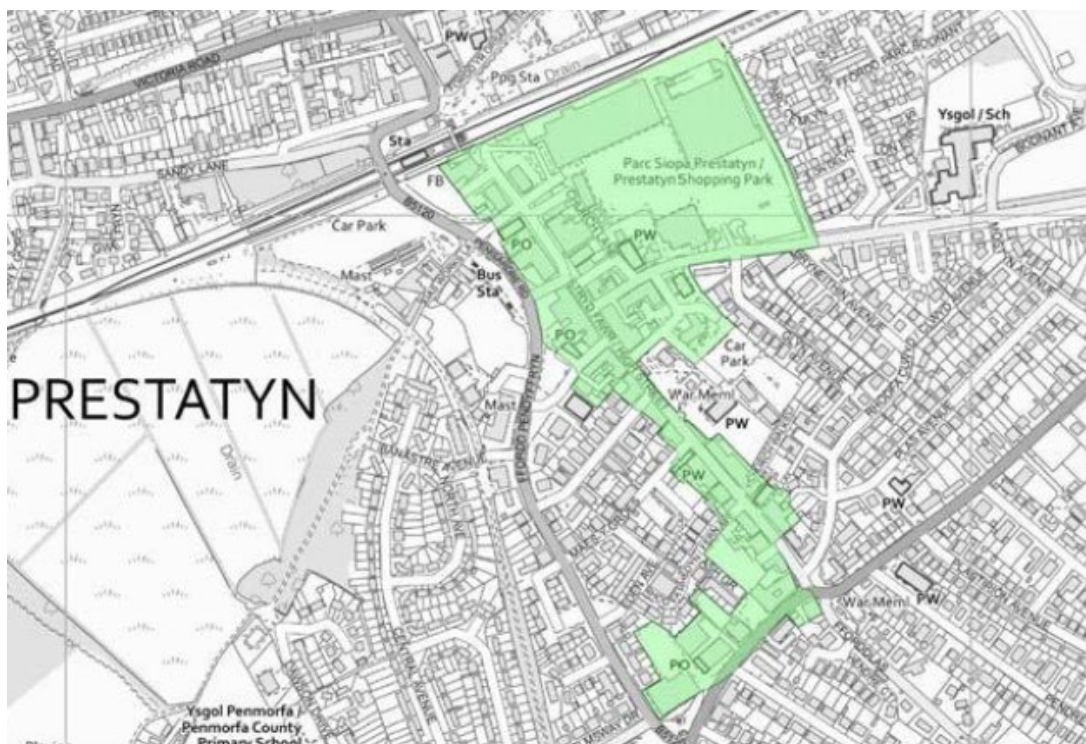
- factors liked: good range of non-food shops generally (6.2%); good for financial services e.g. banks / building societies (5.3%); and good leisure facilities e.g. leisure centres, cinema, health and fitness clubs, etc (4.5%).
- suggested improvements: more / better range of non-food shops generally (16.2%); cleaner / better maintained streets (15.2%); more 'high street' retailers (14.4%); less empty shops (14.2%); update / refurbish the shopping area (13.3%); more / better clothes shops (10.4%); better security / safety (10.1%), more attractive / nicer environment (7.0%); more independent shops (6.5%); more car parking spaces (5.9%); more high quality shops (4.5%); and less charity shops (4.1%).

These household survey results suggest there are higher levels of dissatisfaction than satisfaction with Rhyl town centre. Far more improvements were suggested than factors liked about the centre and much larger numbers mentioned the suggested improvements.

Public transport and accessibility issues were not major factors highlighted in the survey results. The Council's Active Travel Existing Routes Map (ERM) indicates Rhyl urban area is well connected to the town centre by a network of footways alongside the main routes into the centre and non-segregated cycle routes. The railway station and bus stations are within the town centre boundary. There are also bus stops on Crescent Road, West Parade, East Parade and Russell Road. Overall the centre has good levels of accessibility.

Denbighshire Town Centres Assessment - Final Report

Prestatyn town centre



Prestatyn town centre was designated as a Principal Centre in the Denbighshire LDP – Preferred Strategy (2023). It has 168 retail and service units, and the mix of uses is set out in Table 4, which is compared with the Denbighshire and UK averages. A more detailed breakdown of non-retail services is shown in Table 5. The mix of uses in Prestatyn broadly reflects the Denbighshire average, but the centre has a much higher proportion of other non-retail services compared with the County and UK averages.

Denbighshire Town Centres Assessment - Final Report

Table 4 Mix of retail and service uses – Prestatyn town centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Class A1 – Comparison retail	43	25.6	27.2	28.8
Class A1 – Convenience retail	15	8.9	6.5	9.8
Class A2 – Financial / Professional	10	6.0	7.3	8.8
Class A3 – Restaurant / Café	18	10.7	8.6	10.4
Class A3 – Public house / Bar	5	3.0	3.3	5.1
Class A3 – Hot food takeaway	9	5.4	4.8	6.4
Other non-retail services	47	28.0	19.9	16.2
Vacant units	21	12.5	22.3	14.5
Total	168	100.0	100.0	100.0

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

There were 21 vacant units within the centre at the time of the Council’s 2023 land use survey, equating to a shop vacancy rate of 12.5%, which is significantly lower than the County average and slightly lower than the UK average. The low vacancy rate suggests operator demand is more in-line with the supply of shop premises available than other centres in Denbighshire.

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Table 5 Mix of non-retail service uses - Prestatyn town centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Restaurant / café	18	26.5	25.2	24.6
Hot food takeaway	9	13.2	14.0	11.4
Public house / bar	5	7.4	9.7	22.0
Bank / other financial service	4	5.9	8.4	11.3
Betting shop / amusement	2	2.9	2.8	6.7
Estate agent / valuer	4	5.9	7.2	6.2
Travel agent	2	2.9	1.9	1.1
Hairdresser / beauty parlour	23	33.8	30.2	15.5
Launderette / dry cleaner	1	1.5	0.6	1.1
Sub-total	68	100.0	100.0	100.0
Other non-retail services	21			
Total	89			

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

Prestatyn has a reasonable range and choice of comparison goods shops (43), the second highest of all the centres in Denbighshire. This includes large stores in Parc Prestatyn Shopping Park. The household survey results suggest that 22% of households do most of their non-food shopping in Prestatyn town centre, the highest in the County. The high comparison shop provision and market share are consistent with the centre's classification as a Principal Centre at the top of the hierarchy in Denbighshire.

Prestatyn has a good range and choice of non-retail services (89) as shown in Table 5. There is a good provision of hairdressers/beauty parlours, as well as travel agents and restaurants/café's. The centre has a low proportion of pubs/bars and banks/other financial services as well as a relatively low proportion of betting shops/amusement centres and estate agents/valuers.

Denbighshire Town Centres Assessment - Final Report

There is a reasonable selection of national multiples, as set out in Table 6. These multiples are supported by small independent stores.

Table 6 Multiple retailers – Prestatyn town centre

Comparison	Convenience	Food and Beverage
Barnardo's	Aldi	Costa Coffee
Boots	Co-op	Domino's
Card Factory	Holland & Barrett	Subway
Home Bargains	Iceland	
JD Sports	Lidl	
Lloyds Pharmacy	Londis	
Next	Marks & Spencer Foodhall	
Poundland	Spar	
River Island	Tesco	
Rowlands Pharmacy		
RSPCA		
Shelter		
Specsavers		
Vodafone		

Source: ORC Storepoint data 2023; Denbighshire Land Use Survey January 2023.

Denbighshire Town Centres Assessment - Final Report

As part of the household survey, respondents were asked if they had used shops and services in Prestatyn town centre in the last 12 months. Nearly 65% of respondents in Denbighshire had visited Prestatyn town centre, which was the highest figure in the County. Of those who had used shops/services in Prestatyn, respondents were asked what they like about the town centre and what improvements would make them visit the centre more often. The main factor liked about the town centre was 20.1% mentioning that there was a good range of non-food shops generally. The other main factors mentioned were:

- factors liked: close to home (19.2%); good range of independent shops (14.0%); easy to find parking spaces (13.1%); attractive environment / nice place (12.3%); good range of 'high street' retailers (12.3%); good layout / shops close together (9.0%); good range of supermarkets (9.0%); good cafés / restaurants (8.9%); ability to get everything you need (7.5%); nice atmosphere / friendly people (5.3%); free car parking (4.3%); and good range of quality shops (4.1%).
- suggested improvements: more / better clothes shops (6.1%); less tragic congestion / improved access (5.3%); more / better range of non-food shops generally (4.6%); and more 'high street' retailers (4.0%).

These household survey results suggest there are higher levels of satisfaction than dissatisfaction with Prestatyn town centre. Far more factors liked about the centre were mentioned, with a larger number of positive responses, than suggested improvements.

Other than traffic congestion, public transport and accessibility issues were not major factors highlighted in the survey results. The Council's Active Travel Existing Routes Map (ERM) indicates Prestatyn urban area is well connected to the town centre by a network of footways both alongside and away from the main routes into the centre. There are also non-segregated cycle routes to the centre. The railway station is just to the north of the town centre boundary and the bus station is just to the west. Overall the centre has good levels of accessibility.

Denbighshire Town Centres Assessment - Final Report

Ruthin town centre



Ruthin town centre was designated as a Town Centre in the Denbighshire LDP – Preferred Strategy (2023). It has 130 retail and service units, and the mix of uses is set out in Table 7, which is compared with the Denbighshire and UK averages. A more detailed breakdown of non-retail services is shown in Table 8. The mix of uses in Ruthin broadly reflects the Denbighshire average, but the centre has a relatively low provision of food/beverage uses, whilst having a slightly higher proportion of other non-retail services compared with the County and UK averages.

Denbighshire Town Centres Assessment - Final Report

Table 7 Mix of retail and service uses – Ruthin town centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Class A1 – Comparison retail	39	30.0	27.2	28.8
Class A1 – Convenience retail	10	7.7	6.5	9.8
Class A2 – Financial / Professional	9	6.9	7.3	8.8
Class A3 – Restaurant / Café	9	6.9	8.6	10.4
Class A3 – Public house / Bar	6	4.6	3.3	5.1
Class A3 – Hot food takeaway	3	2.3	4.8	6.4
Other non-retail services	29	22.3	19.9	16.2
Vacant units	25	19.2	22.3	14.5
Total	130	100.0	100.0	100.0

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

There were 25 vacant units within the centre at the time of the Council’s 2023 land use survey, equating to a shop vacancy rate of 19.2%, which is lower than the County average but higher than the UK average.

Denbighshire Town Centres Assessment - Final Report

Table 8 Mix of non-retail service uses – Ruthin town centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Restaurant / café	9	20.9	25.2	24.6
Hot food takeaway	3	7.0	14.0	11.4
Public house / bar	6	14.0	9.7	22.0
Bank / other financial service	2	4.7	8.4	11.3
Betting shop / amusement	0	0.0	2.8	6.7
Estate agent / valuer	2	4.7	7.2	6.2
Travel agent	0	0.0	1.9	1.1
Hairdresser / beauty parlour	21	48.8	30.2	15.5
Launderette / dry cleaner	0	0.0	0.6	1.1
Sub-total	43	100.0	100.0	100.0
Other non-retail services	13			
Total	56			

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

Ruthin has a reasonable range and choice of comparison goods shops (39), the third highest of all the centres in Denbighshire. Most of these comparison goods shops are small independent outlets rather than national multiple.

The household survey results suggest only 4% of households do most of their non-food shopping in Ruthin town centre. The more limited comparison shop provision and lower market share are consistent with the centre's classification as a Town Centre at the second tier in the hierarchy in Denbighshire.

Denbighshire Town Centres Assessment - Final Report

Ruthin has a reasonable range and choice of non-retail services (56) as shown in Table 8. There is an extensive provision of hairdressers/beauty parlours, but a relatively low proportion of other non-retail service uses, including restaurant/cafés, hot food takeaways, banks/other financial services, betting shops/amusement centres, estate agents/valuers, travel agents and launderettes/dry cleaners.

Denbighshire Town Centres Assessment - Final Report

As part of the household survey, respondents were asked if they had used shops and services in Ruthin town centre in the last 12 months. Nearly 29% of respondents in Denbighshire had visited Ruthin town centre, which was the fourth highest figure in the County. Of those who had used shops/services in Ruthin town centre, respondents were asked what they like about the town centre and what improvements would make them visit the centre more often. The main factor liked about the town centre was 24.0% mentioning that it was close to home. The other main factors mentioned were:

- factors liked: good range of independent shops (20.9%); attractive environment / nice place (19.7%); traditional / quaint feel (9.7%); nice atmosphere / friendly people (9.3%); familiarity / know where everything is (7.5%); good range of non-food shops generally (6.0%); good cafés / restaurants (5.5%); quiet / not too busy (4.3%); and ability to support local businesses (4.1%).
- suggested improvements: more car parking spaces (11.0%); free car parking (5.2%); and more / better clothes shops (4.3%).

These household survey results suggest there are higher levels of satisfaction than dissatisfaction with Ruthin town centre. More factors liked about the centre were mentioned than suggested improvements Sainsbury's.

Public transport and accessibility issues were not major factors highlighted in the survey results. The Council's Active Travel Existing Routes Map (ERM) indicates Ruthin urban area is well connected to the town centre by a network of footways alongside the main routes into the centre, but there are limited cycle route connections. Ruthin is not served by a railway or bus station, but there are bus stops on Market Street. Overall Ruthin has reasonable levels of accessibility.

Denbighshire Town Centres Assessment - Final Report

Table 9 Mix of retail and service uses – Denbigh town centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Class A1 – Comparison retail	21	21.9	27.2	28.8
Class A1 – Convenience retail	4	4.2	6.5	9.8
Class A2 – Financial / Professional	12	12.5	7.3	8.8
Class A3 – Restaurant / Café	5	5.2	8.6	10.4
Class A3 – Public house / Bar	2	2.1	3.3	5.1
Class A3 – Hot food takeaway	4	4.2	4.8	6.4
Other non-retail services	20	20.8	19.9	16.2
Vacant units	28	29.2	22.3	14.5
Total	96	100.0	100.0	100.0

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

There were 28 vacant units within the centre at the time of the Council’s 2023 land use survey, equating to a shop vacancy rate of 29.2%, which is higher than the County average and much higher than the UK average. The high vacancy rate suggests the supply of shop premises currently exceeds operator demand.

Denbighshire Town Centres Assessment - Final Report

Table 10 Mix of non-retail service uses - Denbigh town centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Restaurant / café	5	15.6	25.2	24.6
Hot food takeaway	4	12.5	14.0	11.4
Public house / bar	2	6.3	9.7	22.0
Bank / other financial service	6	18.8	8.4	11.3
Betting shop / amusement	1	3.1	2.8	6.7
Estate agent / valuer	4	12.5	7.2	6.2
Travel agent	1	3.1	1.9	1.1
Hairdresser / beauty parlour	9	28.1	30.2	15.5
Launderette / dry cleaner	0	0.0	0.6	1.1
Sub-total	32	100.0	100.0	100.0
Other non-retail services	11			
Total	43			

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

Denbigh has a small range and choice of comparison goods shops (21). The household survey results suggest that only 3.4% of households do most of their non-food shopping in Denbigh town centre. The small comparison shop provision and low market share are in line with the centre's classification as a Town Centre in Denbighshire.

Denbigh has a reasonable range and choice of non-retail services (43) as shown in Table 10. There is a good provision of financial services, estate agents/valuers, travel agents, hot food takeaways and hairdressers/beauty parlours, but a relatively low proportion of restaurant/cafés, public houses/bars, betting shops/amusement centres and launderettes/dry cleaners.

Denbighshire Town Centres Assessment - Final Report

As part of the household survey, respondents were asked if they had used shops and services in Denbigh town centre in the last 12 months. Over 33% of respondents in Denbighshire had visited Denbigh town centre, which was the third highest figure in the County. Of those who had used shops/services in Denbigh town centre, respondents were asked what they like about the town centre and what improvements would make them visit the centre more often. The main factor liked about the town centre was 19.9% mentioning that it was close to home. The other main factors mentioned were:

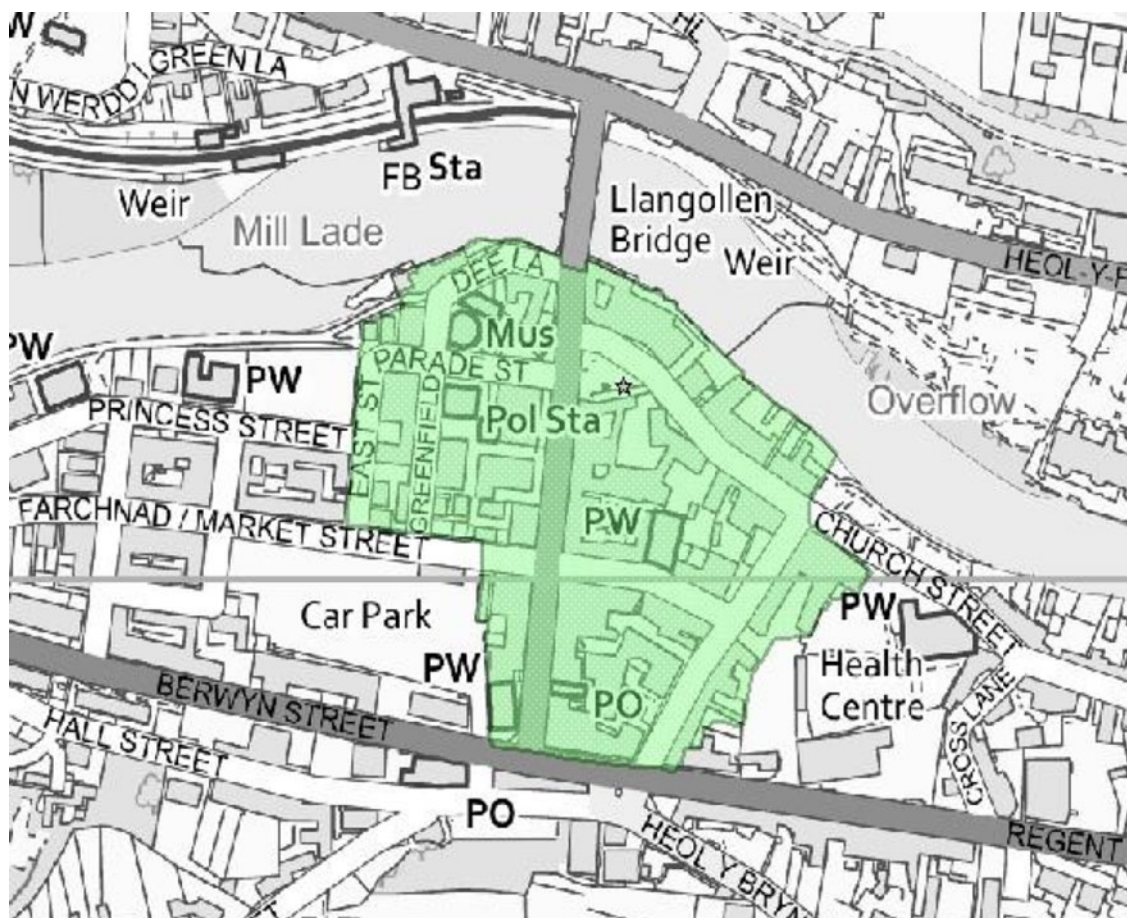
- factors liked: good range of independent shops (11.1%); familiarity / know where everything is (9.9%); attractive environment / nice place (8.2%); nice atmosphere / friendly people (7.4%); good range of non-food shops generally (7.1%); good range of supermarkets (6.1%); good layout / shops close together (5.3%); and good range of health services e.g. doctors, dentists, opticians, etc (4.2%).
- suggested improvements: more / better range of non-food shops generally (9.9%); more / better clothes shops (9.4%); less charity shops (8.5%); more car parking spaces (8.1%); less empty shops (6.5%); more 'high street' retailers (4.2%); and more independent shops (4.1%).

These household survey results suggest there are similar levels of satisfaction and dissatisfaction with Denbigh town centre, with around the same numbers of factors liked and suggested improvements about the centre mentioned.

Public transport and accessibility issues were not major factors highlighted in the survey results. The Council's Active Travel Existing Routes Map (ERM) indicates Denbigh urban area is reasonably well connected to the town centre by a network of footways alongside the main routes into the centre, but there are limited cycle route connections. Denbigh is not served by a railway station, but there are bus stops on the High Street and Bridge Street. Overall Denbigh has reasonable levels of accessibility.

Denbighshire Town Centres Assessment - Final Report

Llangollen town centre



Llangollen town centre was designated as a Town Centre in the Denbighshire LDP – Preferred Strategy (2023). It has 103 retail and service units, and the mix of uses is set out in Table 11, which is compared with the Denbighshire and UK averages. A more detailed breakdown of non-retail services is shown in Table 12. The mix of uses in Llangollen broadly reflects the Denbighshire average, but with some key differences. The centre has a slightly higher proportion of comparison retailers and a significantly higher proportion of restaurants/café when compared with the County and UK averages. There is a relatively low provision of financial/professional services and hot food takeaways.

There were 8 vacant units within the centre at the time of the Council's 2023 land use survey, equating to a shop vacancy rate of 7.8%, which is approximately a third of the County average and almost half the UK average. The relatively low vacancy rate suggests operator demand is in line with the supply of shop premises available.

Denbighshire Town Centres Assessment - Final Report

Llangollen has a reasonable range and choice of comparison goods shops (32). However, the household survey results suggest that only 0.8% of households do most of their non-food shopping in Llangollen town centre. The reasonable comparison shop provision is in line with the centre's classification as a Town Centre in Denbighshire.

Table 11 Mix of retail and service uses – Llangollen town centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Class A1 – Comparison retail	32	31.1	27.2	28.8
Class A1 – Convenience retail	10	9.7	6.5	9.8
Class A2 – Financial / Professional	7	6.8	7.3	8.8
Class A3 – Restaurant / Café	19	18.4	8.6	10.4
Class A3 – Public house / Bar	5	4.9	3.3	5.1
Class A3 – Hot food takeaway	4	3.9	4.8	6.4
Other non-retail services	18	17.5	19.9	16.2
Vacant units	8	7.8	22.3	14.5
Total	103	100.0	100.0	100.0

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

Llangollen has a reasonable range and choice of non-retail services (53) as shown in Table 12. There is a good provision of restaurants/café and hairdressers/beauty parlours, but a relatively low proportion of hot food takeaways, banks/other financial services, betting shops/amusement centres, estate agents/valuers, travel agents and launderettes/dry cleaners.

Denbighshire Town Centres Assessment - Final Report

Table 12 Mix of non-retail service uses - Llangollen town centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Restaurant / café	19	47.5	25.2	24.6
Hot food takeaway	4	10.0	14.0	11.4
Public house / bar	5	12.5	9.7	22.0
Bank / other financial service	2	5.0	8.4	11.3
Betting shop / amusement	1	2.5	2.8	6.7
Estate agent / valuer	2	5.0	7.2	6.2
Travel agent	0	0.0	1.9	1.1
Hairdresser / beauty parlour	7	17.5	30.2	15.5
Launderette / dry cleaner	0	0.0	0.6	1.1
Sub-total	40	100.0	100.0	100.0
Other non-retail services	13			
Total	53			

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

Denbighshire Town Centres Assessment - Final Report

As part of the household survey, respondents were asked if they had used shops and services in Llangollen town centre in the last 12 months. Over 18% of respondents in Denbighshire had visited Llangollen town centre, which was the only the sixth highest figure in the County. Of those who had used shops/services in Llangollen town centre, respondents were asked what they like about the town centre and what improvements would make them visit the centre more often. The main factor liked about the town centre was 29.8% mentioning that it was an attractive environment or nice place. The other main factors mentioned were:

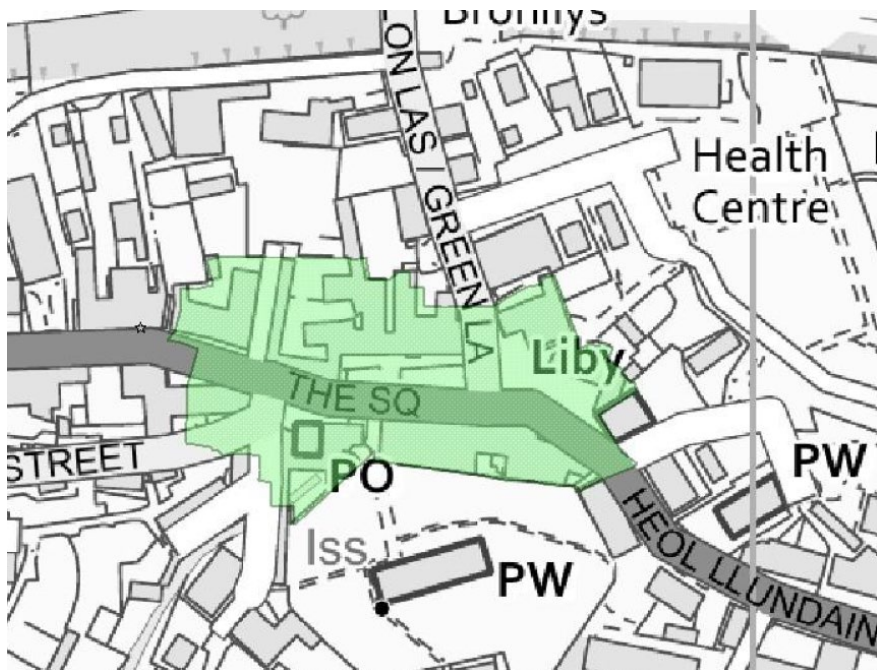
- factors liked: good cafés / restaurants (16.0%); good range of independent shops (15.5%); nice atmosphere / friendly people (15.4%); close to home (15.3%); good range of non-food shops generally (10.7%); good for a day out (6.9%); open / green spaces (6.1%); good layout / shops close together (6.0%); traditional / quaint feel (4.8%); good range of supermarkets (4.5%); and familiarity / know where everything is (4.5%).
- suggested improvements: more car parking spaces (24.2%); more independent shops (5.8%); more / better clothes shops (5.0%); less traffic congestion / improved access (4.7%); and cheaper car parking (4.3%).

These household survey results suggest there are higher levels of satisfaction than dissatisfaction with Llangollen town centre. Much more factors liked about the centre were mentioned than suggested improvements, with greater numbers mentioning factors liked. However, the suggested improvement mentioned related to car parking, with nearly a quarter of respondents suggesting this improvement.

Other than traffic congestion, public transport and accessibility issues were not major factors highlighted in the survey results. The Council's Active Travel Existing Routes Map (ERM) indicates Llangollen urban area is well connected to the town centre by a network of footways alongside the main routes into the centre, but there are limited cycle route connections. The railway station is located within walking distance to the north of the town centre. There are bus stops near the railway station and on Parade Street. Overall Llangollen has reasonable levels of accessibility.

Denbighshire Town Centres Assessment - Final Report

Corwen



Corwen was designated as a Local Centre in the Denbighshire LDP – Preferred Strategy (2023). It has 35 retail and service units, and the mix of uses is set out in Table 13, which is compared with the Denbighshire and UK averages. A more detailed breakdown of non-retail services is shown in Table 14. The mix of uses in Corwen is different to the Denbighshire average. The centre has a lower proportion of comparison retailers compared with the County and UK averages, partly due to the higher vacancy rate. There is a relatively low provision of financial/professional services and pubs/bars.

Denbighshire Town Centres Assessment - Final Report

Table 13 Mix of retail and service uses – Corwen centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Class A1 – Comparison retail	7	20.0	27.2	28.8
Class A1 – Convenience retail	3	8.6	6.5	9.8
Class A2 – Financial / Professional	2	5.7	7.3	8.8
Class A3 – Restaurant / Café	4	11.4	8.6	10.4
Class A3 – Public house / Bar	0	0.0	3.3	5.1
Class A3 – Hot food takeaway	3	8.6	4.8	6.4
Other non-retail services	6	17.1	19.9	16.2
Vacant units	10	28.6	22.3	14.5
Total	35	100.0	100.0	100.0

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average

There were 10 vacant units within the centre at the time of the Council’s 2023 land use survey, equating to a shop vacancy rate of 28.6%, which is higher than the County average and much higher than the UK average. The high vacancy rate suggests the supply of shop premises currently exceeds operator demand.

Denbighshire Town Centres Assessment - Final Report

Table 14 Mix of non-retail service uses – Corwen centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Restaurant / café	4	36.4	25.2	24.6
Hot food takeaway	3	27.3	14.0	11.4
Public house / bar	0	0.0	9.7	22.0
Bank / other financial service	0	0.0	8.4	11.3
Betting shop / amusement	0	0.0	2.8	6.7
Estate agent / valuer	1	9.1	7.2	6.2
Travel agent	0	0.0	1.9	1.1
Hairdresser / beauty parlour	3	27.3	30.2	15.5
Launderette / dry cleaner	0	0.0	0.6	1.1
Sub-total	11	100.0	100.0	100.0
Other non-retail services	4			
Total	15			

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

Corwen has a limited range and choice of comparison goods shops (7). The household survey results suggest that no households surveyed do their most of their non-food shopping in Corwen. Corwen has a limited range and choice of non-retail services (15) as shown in Table 14. There are very good provisions of restaurants/cafés and hot food takeaways, relative to the centre's size, and also a reasonably high provision of hairdressers/beauty parlours. There are no public houses/bars, bank/other financial services, betting shop/amusement centres, travel agents or launderettes/dry cleaners

Denbighshire Town Centres Assessment - Final Report

As part of the household survey, respondents were asked if they had used shops and services in Corwen local centre in the last 12 months. Nearly 8% of respondents in Denbighshire had visited Corwen, which was the eighth and lowest figure in the County. Of those who had used shops/services in Corwen, respondents were asked what they like about the centre and what improvements would make them visit the centre more often. The main factor liked about the centre was 19.1% mentioning that there was a good range of independent shops. The other main factors mentioned were:

- factors liked: close to home (14.7%); good range of bakers / butchers / greengrocers (11.9%); good layout / shops close together (9.5%); attractive environment / nice place (9.5%); nice atmosphere / friendly people (7.8%); good range of non-food shops generally (6.4%); and close to friends / relatives (6.1%).
- suggested improvements: more / better range of non-food shops generally (10.3%); more independent shops (8.5%); more 'high street' retailers (7.8%); more car parking spaces (7.7%); update / refurbish the shopping area (7.4%); less empty shops (5.9%); cheaper car parking (5.5%); more / better range of supermarkets (4.8%); and more / better cafés / restaurants (4.2%).

These household survey results suggest there are similar levels of satisfaction and dissatisfaction with Corwen.

Public transport and accessibility issues were not major factors highlighted in the survey results. The Council's Active Travel Existing Routes Maps (ERMs) do not cover Corwen. Corwen is not served by a railway station, but there are bus stops on London Road. Overall Corwen has reasonable levels of accessibility but lower than most other centres in Denbighshire.

Denbighshire Town Centres Assessment - Final Report

Rhuddlan



Rhuddlan was designated as a Local Centre in the Denbighshire LDP – Preferred Strategy (2023). It has 45 retail and service units, and the mix of uses is set out in Table 15, which is compared with the Denbighshire and UK averages. A more detailed breakdown of non-retail services is shown in Table 16. The mix of uses in Rhuddlan has several key differences to the Denbighshire average. The centre has a low proportion of comparison retailers and a very low proportion of convenience retailers, compared with the County and UK averages. There is a reasonable provision of food/beverage uses, and a relatively high provision of financial/professional and other non-retail services.

There were 9 vacant units within the centre at the time of the Council's 2023 land use survey, equating to a shop vacancy rate of 20%, which is just below the County average but higher than the UK average.

Denbighshire Town Centres Assessment - Final Report

Table 15 Mix of retail and service uses – Rhuddlan centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Class A1 – Comparison retail	8	17.8	27.2	28.8
Class A1 – Convenience retail	1	2.2	6.5	9.8
Class A2 – Financial / Professional	6	13.3	7.3	8.8
Class A3 – Restaurant / Café	5	11.1	8.6	10.4
Class A3 – Public house / Bar	1	2.2	3.3	5.1
Class A3 – Hot food takeaway	2	4.4	4.8	6.4
Other non-retail services	13	28.9	19.9	16.2
Vacant units	9	20.0	22.3	14.5
Total	45	100.0	100.0	100.0

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

Rhuddlan has a limited range and choice of comparison goods shops (8). The household survey results suggest that only 2.7% of households do most of their non-food shopping in Rhuddlan.

Rhuddlan has a better range and choice of non-retail services (27) as shown in Table 16. There is relatively good provision of restaurants/café, banks/other financial services, estate agents/valuers, travel agents and hairdressers/beauty parlours, but a relatively low proportion of hot food takeaways and public houses/bars. There are no betting shops/amusement centres or laundrettes/dry cleaners.

Denbighshire Town Centres Assessment - Final Report

Table 16 Mix of non-retail service uses - Rhuddlan centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Restaurant / café	5	22.7	25.2	24.6
Hot food takeaway	2	9.1	14.0	11.4
Public house / bar	1	4.5	9.7	22.0
Bank / other financial service	3	13.6	8.4	11.3
Betting shop / amusement	0	0.0	2.8	6.7
Estate agent / valuer	3	13.6	7.2	6.2
Travel agent	1	4.5	1.9	1.1
Hairdresser / beauty parlour	7	31.8	30.2	15.5
Launderette / dry cleaner	0	0.0	0.6	1.1
Sub-total	22	100.0	100.0	100.0
Other non-retail services	5			
Total	27			

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

Denbighshire Town Centres Assessment - Final Report

As part of the household survey, respondents were asked if they had used shops and services in Rhuddlan local centre in the last 12 months. Over 23% of respondents in Denbighshire had visited Rhuddlan, which was the fifth highest figure in the County. Of those who had used shops/services in Rhuddlan, respondents were asked what they like about the centre and what improvements would make them visit the centre more often. The main factor liked about the centre was 15.8% mentioning that it had an attractive environment and was a nice place. The other main factors mentioned were:

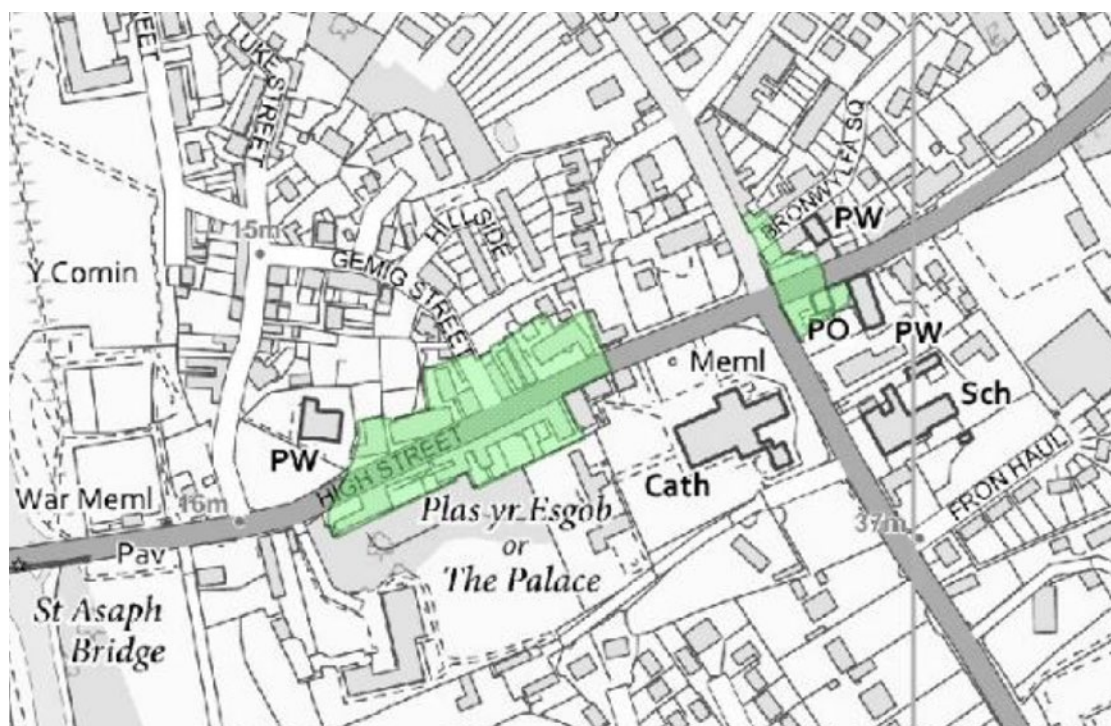
- factors liked: close to home (15.5%); good cafés / restaurants (9.9%); good range of independent shops (9.9%); traditional / quaint feel (9.1%); ability to get everything you need (7.3%); good range of supermarkets (7.3%); good range of other services e.g. library, hairdressers, vets, etc (7.3%); good layout / shops close together (7.1%); and nice atmosphere / friendly people (6.6%).
- suggested improvements: more car parking spaces (14.9%); less traffic congestion / improved access (7.6%); and more independent shops (6.5%).

These household survey results suggest there are slightly higher levels of satisfaction than dissatisfaction with Rhuddlan. More factors liked about the centre were mentioned than suggested improvements.

Other than traffic congestion, public transport and accessibility issues were not major factors highlighted in the survey results. The Council's Active Travel Existing Routes Map (ERM) indicates Rhuddlan urban area is less well connected to the town centre by footways than other centres in Denbighshire. The area to the south of the town centre is well served by on-road cycle routes. Rhuddlan is not served by a railway station but there are bus stops on Rhyl Road, Princes Road and Station Road. Overall Rhuddlan has reasonable levels of accessibility but lower than most other centres in Denbighshire.

Denbighshire Town Centres Assessment - Final Report

St Asaph



St Asaph was designated as a Local Centre in the Denbighshire LDP – Preferred Strategy (2023). It has 37 retail and service units, and the mix of uses is set out in Table 17, which is compared with the Denbighshire and UK averages. A more detailed breakdown of non-retail services is shown in Table 18. The mix of uses in St Asaph has a few key differences to the Denbighshire average. The centre has a significantly lower proportion of comparison retailers compared with the County and UK averages, due to the high vacancy rate. Within the food/beverage sector there is a relatively low provision of restaurants/ cafés, but higher provisions of hot food takeaways and pubs/bars. There is also a slightly lower provision of financial/professional services.

Denbighshire Town Centres Assessment - Final Report

Table 17 Mix of retail and service uses – St Asaph centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Class A1 – Comparison retail	4	10.8	27.2	28.8
Class A1 – Convenience retail	3	8.1	6.5	9.8
Class A2 – Financial / Professional	2	5.4	7.3	8.8
Class A3 – Restaurant / Café	2	5.4	8.6	10.4
Class A3 – Public house / Bar	2	5.4	3.3	5.1
Class A3 – Hot food takeaway	5	13.5	4.8	6.4
Other non-retail services	6	16.2	19.9	16.2
Vacant units	13	35.1	22.3	14.5
Total	37	100.0	100.0	100.0

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

There were 13 vacant units within the centre at the time of the Council’s 2023 land use survey, equating to a shop vacancy rate of 35.1%, which is much higher than the County and UK averages. The high vacancy rate suggests the supply of shop premises currently exceeds operator demand.

Denbighshire Town Centres Assessment - Final Report

Table 18 Mix of non-retail service uses – St Asaph centre

Type	Number of units	% units	% units Denbighshire average	% units UK average
Restaurant / café	2	13.3	25.2	24.6
Hot food takeaway	5	33.3	14.0	11.4
Public house / bar	2	13.3	9.7	22.0
Bank / other financial service	1	6.7	8.4	11.3
Betting shop / amusement	1	6.7	2.8	6.7
Estate agent / valuer	0	0.0	7.2	6.2
Travel agent	0	0.0	1.9	1.1
Hairdresser / beauty parlour	3	20.0	30.2	15.5
Launderette / dry cleaner	1	6.7	0.6	1.1
Sub-total	15	100.0	100.0	100.0
Other non-retail services	2			
Total	17			

Source: Denbighshire Land Use Survey January 2023; Goad Plan UK average.

St Asaph has a very limited range and choice of comparison goods shops (4), the lowest of all the centres in Denbighshire. The household survey results suggest that only 1.3% of households do most of their non-food shopping in St Asaph.

St Asaph has a better but still small range and choice of non-retail services (17) as shown in Table 18. There is a reasonably good provision of hot food takeaways, hairdressers/beauty parlours and launderettes/dry cleaners for the centre's size, but a relatively low proportion of restaurants/cafés and banks/other financial services, with no estate agents/valuers nor travel agents.

Denbighshire Town Centres Assessment - Final Report

As part of the household survey, respondents were asked if they had used shops and services in St Asaph local centre in the last 12 months. Nearly 17% of respondents in Denbighshire had visited St Asaph, which was the seventh highest figure in the County. Of those who had used shops/services in St Asaph, respondents were asked what they like about the centre and what improvements would make them visit the centre more often. The main factor liked about the centre was 17.6% mentioning that it had an attractive environment and was a nice place. The other main factors mentioned were:

- factors liked: nice atmosphere / friendly people (14.3%); close to home (11.6%); good cafés / restaurants (8.7%); open / green spaces (7.2%); good range of other services e.g. library, hairdressers, vets, etc (5.6%); close to shopping park / outlet centre (4.7%); and clean streets / well-maintained (4.2%).
- suggested improvements: more car parking spaces (8.9%); more / better range of supermarkets (7.7%); more / better range of non-food shops generally (7.6%); and more bakers / butchers / greengrocers (6.3%).

These household survey results suggest there are higher levels of satisfaction than dissatisfaction with St Asaph. There were more factors liked about the centre mentioned than suggested improvements.

Public transport and accessibility issues were not major factors highlighted in the survey results. The Council's Active Travel Existing Routes Map (ERM) indicates St Asaph urban area is less well connected to the town centre by footways and cycle routes than other centres in Denbighshire. St Asaph is not served by a railway station, but there are bus stops on the High Street and Upper Denbigh Road. Overall St Asaph has reasonable levels of accessibility but lower than most other centres in Denbighshire.

Denbighshire Town Centres Assessment - Final Report

Appendix 3 Convenience retail capacity

Denbighshire Town Centres Assessment - Final Report

Table 1 – Study area population projections

Retail Zone	2023	2028	2033	2038
1 – Rhyl	26,881	27,061	27,286	27,518
2 – Prestatyn	18,883	18,925	18,965	18,963
3 – Elwy	15,412	15,510	15,547	15,629
4 – Denbigh	13,973	14,118	14,219	14,386
5 – Ruthin	13,680	13,845	13,940	14,067
6 – Dee Valley	7,826	7,866	7,909	7,970
Total	96,655	97,325	97,866	98,533
Tourists (daily average)	32,400	32,400	32,400	32,400

Sources: Experian population projections and Denbighshire Steam Final Trend Report 2011 – 2022.

Table 2: Convenience good expenditure per person per annum (£)

Retail Zone	2023	2028	2033	2038
1 – Rhyl	2,121	2,094	2,101	2,113
2 – Prestatyn	2,303	2,274	2,282	2,295
3 – Elwy	2,398	2,368	2,376	2,390
4 – Denbigh	2,366	2,336	2,344	2,357
5 – Ruthin	2,570	2,538	2,547	2,561
6 – Dee Valley	2,501	2,470	2,479	2,493
Tourist visitors	1,584	1,564	1,570	1,579

Sources: Experian Local Expenditure 2021 (2021 Prices)

Experian growth rates – Retail planner briefing note 20 (February 2023)

Excludes special forms of trading (SFT)

Denbighshire Town Centres Assessment - Final Report

Table 3 – Total convenience goods expenditure (£m)

Retail Zone	2023	2028	2033	2038
1 – Rhyl	57.01	56.67	57.33	58.15
2 – Prestatyn	43.49	43.04	43.28	43.52
3 – Elwy	36.96	36.73	36.94	37.35
4 – Denbigh	33.06	32.98	33.33	33.91
5 – Ruthin	35.16	35.14	35.51	36.03
6 – Dee Valley	19.57	19.43	19.61	19.87
Total	225.25	223.98	225.99	228.82
Tourist Visitors	51.32	50.69	50.87	51.16

Source Tables 1 and 2.

Denbighshire Town Centres Assessment - Final Report

Table 4 - Base year 2023 convenience goods market shares by zone (%)

Location	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourist Visitors
Aldi - Rhyl	18.2%	1.9%	1.6%	0.0%	0.0%	0.0%	2.0%
Morrison's, Rhyl	23.0%	0.9%	1.0%	0.0%	0.0%	0.0%	20.0%
Sainsbury's, Rhyl	18.0%	3.4%	12.1%	2.2%	0.5%	0.0%	15.0%
Other Rhyl	18.6%	1.0%	0.9%	0.0%	0.0%	0.0%	5.0%
Aldi, Prestatyn	0.5%	29.9%	0.0%	0.0%	0.0%	0.0%	2.0%
Lidl, Prestatyn	0.8%	7.6%	2.4%	0.0%	0.0%	0.0%	3.0%
Tesco, Prestatyn	3.5%	40.8%	9.4%	2.7%	0.5%	0.0%	15.0%
Other Prestatyn	0.2%	12.0%	2.0%	0.3%	0.0%	0.0%	15.0%
Aldi, Rhuddlan	6.0%	0.2%	15.8%	0.0%	0.0%	0.8%	1.0%
Other Rhuddlan	0.0%	0.0%	4.4%	0.0%	0.0%	0.0%	1.0%
St Asaph	0.0%	0.0%	6.7%	0.0%	0.0%	0.0%	1.0%
Other Zone 3	0.4%	0.0%	6.8%	1.3%	0.0%	0.0%	1.0%
Aldi, Denbigh	1.2%	0.0%	7.5%	21.8%	0.0%	0.0%	2.0%
Lidl, Denbigh	0.0%	0.0%	4.2%	10.0%	0.0%	0.0%	2.0%
Morrison's, Denbigh	0.0%	0.0%	7.3%	31.0%	0.7%	0.0%	5.0%
Other Denbigh	0.0%	0.0%	0.4%	8.8%	0.0%	0.0%	1.0%
Other Zone 4	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	1.0%
Aldi, Ruthin	0.0%	1.0%	1.1%	5.0%	25.5%	1.3%	1.0%
Tesco, Ruthin	0.0%	0.0%	0.0%	12.7%	37.5%	6.1%	1.0%
Other Ruthin	0.0%	0.0%	0.4%	1.6%	10.5%	0.0%	1.0%
Other Zone 5	0.0%	0.0%	0.0%	0.0%	5.3%	0.0%	1.0%
Aldi, Llangollen	0.5%	0.0%	0.0%	0.0%	0.9%	43.3%	1.0%
Other Llangollen	0.2%	0.0%	0.0%	0.0%	0.0%	13.7%	1.0%
Corwen	0.0%	0.0%	0.0%	0.0%	0.2%	3.4%	1.0%
Other Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	1.0%

Denbighshire Town Centres Assessment - Final Report

Location	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourist Visitors
Denbighshire Total	91.0%	98.7%	84.2%	99.0%	81.6%	71.7%	100.0%
Chester	0.0%	0.0%	0.5%	0.0%	0.8%	0.0%	n/a
Colwyn Bay	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	n/a
Kinmel Bay	9.0%	1.3%	7.3%	0.0%	0.0%	0.0%	n/a
Llandudno	0.0%	0.0%	0.0%	0.0%	1.0%	1.0%	n/a
Mold	0.0%	0.0%	2.2%	0.0%	10.4%	0.0%	n/a
Wrexham	0.0%	0.0%	0.0%	1.0%	4.7%	14.0%	n/a
Elsewhere	0.0%	0.0%	4.3%	0.0%	1.5%	13.4%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey October 2023 and Lichfields' analysis

Denbighshire Town Centres Assessment - Final Report

Table 5 – Base year 2023 convenience goods expenditure patterns by zone (£m)

Location / zone	1	2	3	4	5	6	Tourists	Total
Expenditure 2023	57.01	43.49	36.96	33.06	35.16	19.57	51.32	276.57
Aldi, Rhyl	10.37	0.83	0.60	0.00	0.00	0.00	1.03	12.83
Morrison's, Rhyl	13.09	0.40	0.37	0.00	0.00	0.00	10.26	24.12
Sainsbury's, Rhyl	10.23	1.48	4.49	0.73	0.16	0.00	7.70	24.79
Other Rhyl	10.60	0.43	0.33	0.00	0.00	0.00	2.57	13.94
Zone 1 - sub-total	44.30	3.14	5.79	0.73	0.16	0.00	21.56	75.67
Aldi, Prestatyn	0.26	12.99	0.00	0.00	0.00	0.00	1.03	14.28
Lidl, Prestatyn	0.47	3.29	0.89	0.00	0.00	0.00	1.54	6.19
Tesco, Prestatyn	2.01	17.73	3.48	0.88	0.16	0.00	7.70	31.96
Other Prestatyn	0.11	5.24	0.75	0.09	0.00	0.00	7.70	13.89
Zone 2 - sub-total	2.86	39.26	5.12	0.97	0.16	0.00	17.96	66.32
Aldi, Rhuddlan	3.40	0.10	5.85	0.00	0.00	0.15	0.51	10.02
Other Rhuddlan	0.00	0.00	1.63	0.00	0.00	0.00	0.51	2.14
St Asaph	0.00	0.00	2.48	0.00	0.00	0.00	0.51	2.99
Other Zone 3	0.23	0.00	2.51	0.43	0.00	0.00	0.51	3.68
Zone 3 - sub-total	3.63	0.10	12.47	0.43	0.00	0.15	2.05	18.83
Aldi, Denbigh	0.71	0.00	2.76	7.22	0.00	0.00	1.03	11.71
Lidl, Denbigh	0.00	0.00	1.56	3.31	0.00	0.00	1.03	5.90
Morrison's, Denbigh	0.00	0.00	2.71	10.25	0.24	0.00	2.57	15.77
Other Denbigh	0.00	0.00	0.15	2.92	0.00	0.00	0.51	3.58
Other Zone 4	0.00	0.00	0.00	0.53	0.00	0.00	0.51	1.04
Zone 4 - sub-total	0.71	0.00	7.18	24.23	0.24	0.00	5.65	38.00
Aldi, Ruthin	0.00	0.43	0.40	1.64	8.97	0.26	0.51	12.22
Tesco, Ruthin	0.00	0.00	0.00	4.19	13.19	1.20	0.51	19.10
Other Ruthin	0.00	0.00	0.15	0.54	3.70	0.00	0.51	4.91
Other Zone 5	0.00	0.00	0.00	0.00	1.88	0.00	0.51	2.39

Denbighshire Town Centres Assessment - Final Report

Location / zone	1	2	3	4	5	6	Tourists	Total
Zone 5 - sub-total	0.00	0.43	0.55	6.38	27.74	1.46	2.05	38.62
Aldi, Llangollen	0.26	0.00	0.00	0.00	0.32	8.48	0.51	9.57
Other Llangollen	0.11	0.00	0.00	0.00	0.00	2.69	0.51	3.31
Corwen	0.00	0.00	0.00	0.00	0.08	0.67	0.51	1.26
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.58	0.51	1.09
Zone 6 - sub-total	0.37	0.00	0.00	0.00	0.40	12.41	2.05	15.24
Denbighshire Total	51.87	42.93	31.11	32.73	28.70	14.03	51.32	252.69
Chester	0.00	0.00	0.18	0.00	0.28	0.00	n/a	0.47
Colwyn Bay	0.00	0.00	0.58	0.00	0.00	0.00	n/a	0.58
Kinmel Bay	5.13	0.55	2.68	0.00	0.00	0.00	n/a	8.36
Llandudno	0.00	0.00	0.00	0.00	0.35	0.19	n/a	0.54
Mold	0.00	0.00	0.83	0.00	3.64	0.00	n/a	4.47
Wrexham	0.00	0.00	0.00	0.33	1.66	2.74	n/a	4.73
Elsewhere	0.00	0.00	1.58	0.00	0.52	2.62	n/a	4.72
TOTAL	57.00	43.47	36.97	33.06	35.16	19.57	51.32	276.55

Source: Tables 3 and 4

Denbighshire Town Centres Assessment - Final Report

Table 6 - Future 2028 convenience goods expenditure patterns by zone (£m)

Location / Zone	1	2	3	4	5	6	Tourists	Total
Expenditure 2028	56.67	43.04	36.73	32.98	35.14	19.43	50.69	274.66
Aldi, Rhyl	10.31	0.82	0.60	0.00	0.00	0.00	1.01	12.74
Morrison's, Rhyl	13.01	0.39	0.36	0.00	0.00	0.00	10.14	23.90
Sainsbury's, Rhyl	10.17	1.46	4.46	0.72	0.16	0.00	7.60	24.58
Other Rhyl	10.54	0.43	0.33	0.00	0.00	0.00	2.53	13.84
Zone 1 - sub-total	44.03	3.10	5.75	0.72	0.16	0.00	21.29	75.06
Aldi, Prestatyn	0.26	12.86	0.00	0.00	0.00	0.00	1.01	14.13
Lidl, Prestatyn	0.47	3.26	0.88	0.00	0.00	0.00	1.52	6.13
Tesco, Prestatyn	2.00	17.55	3.46	0.88	0.16	0.00	7.60	31.65
Other Prestatyn	0.11	5.18	0.75	0.09	0.00	0.00	7.60	13.73
Zone 2 - sub-total	2.84	38.85	5.09	0.96	0.16	0.00	17.74	65.64
Aldi, Rhuddlan	3.38	0.10	5.82	0.00	0.00	0.15	0.51	9.96
Other Rhuddlan	0.00	0.00	1.62	0.00	0.00	0.00	0.51	2.12
St Asaph	0.00	0.00	2.46	0.00	0.00	0.00	0.51	2.97
Other Zone 3	0.23	0.00	2.50	0.43	0.00	0.00	0.51	3.66
Zone 3 - sub-total	3.61	0.10	12.39	0.43	0.00	0.15	2.03	18.71
Aldi, Denbigh	0.71	0.00	2.74	7.21	0.00	0.00	1.01	11.66
Lidl, Denbigh	0.00	0.00	1.55	3.30	0.00	0.00	1.01	5.87
Morrison's, Denbigh	0.00	0.00	2.70	10.22	0.24	0.00	2.53	15.69
Other Denbigh	0.00	0.00	0.15	2.92	0.00	0.00	0.51	3.57
Other Zone 4	0.00	0.00	0.00	0.53	0.00	0.00	0.51	1.03
Zone 4 - sub-total	0.71	0.00	7.13	24.17	0.24	0.00	5.58	37.83
Aldi, Ruthin	0.00	0.43	0.40	1.64	8.97	0.26	0.51	12.20
Tesco, Ruthin	0.00	0.00	0.00	4.18	13.18	1.19	0.51	19.07
Other Ruthin	0.00	0.00	0.15	0.54	3.70	0.00	0.51	4.90
Other Zone 5	0.00	0.00	0.00	0.00	1.88	0.00	0.51	2.39

Denbighshire Town Centres Assessment - Final Report

Location / Zone	1	2	3	4	5	6	Tourists	Total
Zone 5 - sub-total	0.00	0.43	0.55	6.36	27.73	1.45	2.03	38.55
Aldi, Llangolan	0.26	0.00	0.00	0.00	0.32	8.41	0.51	9.50
Other Llangolan	0.11	0.00	0.00	0.00	0.00	2.67	0.51	3.29
Corwen	0.00	0.00	0.00	0.00	0.08	0.67	0.51	1.25
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.57	0.51	1.08
Zone 5 - sub-total	0.37	0.00	0.00	0.00	0.40	12.32	2.03	15.12
Denbighshire Total	51.55	42.48	30.92	32.65	28.69	13.93	50.69	250.90
Chester	0.00	0.00	0.18	0.00	0.28	0.00	n/a	0.46
Colwyn Bay	0.00	0.00	0.58	0.00	0.00	0.00	n/a	0.58
Kinmel Bay	5.10	0.54	2.67	0.00	0.00	0.00	n/a	8.31
Llandudno	0.00	0.00	0.00	0.00	0.35	0.19	n/a	0.54
Mold	0.00	0.00	0.82	0.00	3.64	0.00	n/a	4.46
Wrexham	0.00	0.00	0.00	0.33	1.66	2.72	n/a	4.71
Elsewhere	0.00	0.00	1.57	0.00	0.52	2.60	n/a	4.69
TOTAL	56.65	43.02	36.74	32.98	35.14	19.43	50.69	274.64

Source: Tables 3 and 4

Denbighshire Town Centres Assessment - Final Report

Table 7 – Future 2033 convenience goods expenditure patterns by zone (£m)

Location / Zone	1	2	3	4	5	6	Tourists	Total
Expenditure 2033	57.33	43.28	36.94	33.33	35.51	19.61	50.87	276.86
Aldi, Rhyl	10.43	0.82	0.60	0.00	0.00	0.00	1.02	12.87
Morrison's, Rhyl	13.16	0.39	0.37	0.00	0.00	0.00	10.17	24.10
Sainsbury's, Rhyl	10.29	1.47	4.49	0.73	0.16	0.00	7.63	24.77
Other Rhyl	10.66	0.43	0.33	0.00	0.00	0.00	2.54	13.97
Zone 1 - sub-total	44.54	3.12	5.79	0.73	0.16	0.00	21.37	75.71
Aldi, Prestatyn	0.26	12.93	0.00	0.00	0.00	0.00	1.02	14.21
Lidl, Prestatyn	0.47	3.28	0.89	0.00	0.00	0.00	1.53	6.17
Tesco, Prestatyn	2.02	17.65	3.48	0.89	0.16	0.00	7.63	31.83
Other Prestatyn	0.12	5.21	0.75	0.09	0.00	0.00	7.63	13.80
Zone 2 - sub-total	2.87	39.07	5.12	0.97	0.16	0.00	17.80	66.00
Aldi, Rhuddlan	3.42	0.10	5.85	0.00	0.00	0.15	0.51	10.03
Other Rhuddlan	0.00	0.00	1.63	0.00	0.00	0.00	0.51	2.14
St Asaph	0.00	0.00	2.47	0.00	0.00	0.00	0.51	2.98
Other Zone 3	0.23	0.00	2.51	0.43	0.00	0.00	0.51	3.68
Zone 3 - sub-total	3.65	0.10	12.46	0.43	0.00	0.15	2.03	18.83
Aldi, Denbigh	0.71	0.00	2.75	7.28	0.00	0.00	1.02	11.77
Lidl, Denbigh	0.00	0.00	1.56	3.34	0.00	0.00	1.02	5.92
Morrison's, Denbigh	0.00	0.00	2.71	10.33	0.24	0.00	2.54	15.83
Other Denbigh	0.00	0.00	0.15	2.95	0.00	0.00	0.51	3.60
Other Zone 4	0.00	0.00	0.00	0.53	0.00	0.00	0.51	1.04
Zone 4 - sub-total	0.71	0.00	7.18	24.43	0.24	0.00	5.60	38.15
Aldi, Ruthin	0.00	0.43	0.40	1.66	9.06	0.26	0.51	12.32
Tesco, Ruthin	0.00	0.00	0.00	4.23	13.32	1.20	0.51	19.26
Other Ruthin	0.00	0.00	0.15	0.54	3.74	0.00	0.51	4.94
Other Zone 5	0.00	0.00	0.00	0.00	1.90	0.00	0.51	2.41

Denbighshire Town Centres Assessment - Final Report

Location / Zone	1	2	3	4	5	6	Tourists	Total
Zone 5 - sub-total	0.00	0.43	0.55	6.43	28.02	1.47	2.03	38.93
Aldi, Llangolan	0.26	0.00	0.00	0.00	0.32	8.49	0.51	9.58
Other Llangolan	0.12	0.00	0.00	0.00	0.00	2.69	0.51	3.32
Corwen	0.00	0.00	0.00	0.00	0.08	0.67	0.51	1.26
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.58	0.51	1.09
Zone 5 - sub-total	0.37	0.00	0.00	0.00	0.40	12.43	2.03	15.25
Denbighshire Total	52.15	42.72	31.10	32.99	28.99	14.05	50.87	252.87
Chester	0.00	0.00	0.18	0.00	0.29	0.00	n/a	0.47
Colwyn Bay	0.00	0.00	0.58	0.00	0.00	0.00	n/a	0.58
Kinmel Bay	5.16	0.54	2.68	0.00	0.00	0.00	n/a	8.39
Llandudno	0.00	0.00	0.00	0.00	0.35	0.19	n/a	0.54
Mold	0.00	0.00	0.83	0.00	3.68	0.00	n/a	4.50
Wrexham	0.00	0.00	0.00	0.34	1.68	2.74	n/a	4.76
Elsewhere	0.00	0.00	1.58	0.00	0.53	2.62	n/a	4.73
TOTAL	57.32	43.26	36.95	33.33	35.51	19.61	50.87	276.84

Source: Tables 3 and 4

Denbighshire Town Centres Assessment - Final Report

Table 8 – Future convenience goods expenditure patterns by zone (£m)

Location / Zone	1	2	3	4	5	6	Tourists	Total
Expenditure 2038	58.15	43.52	37.35	33.91	36.03	19.87	51.16	279.98
Aldi, Rhyl	10.57	0.83	0.61	0.00	0.00	0.00	1.02	13.04
Morrison's, Rhyl	13.35	0.40	0.37	0.00	0.00	0.00	10.23	24.35
Sainsbury's, Rhyl	10.44	1.48	4.54	0.75	0.16	0.00	7.67	25.04
Other Rhyl	10.82	0.44	0.34	0.00	0.00	0.00	2.56	14.14
Zone 1 - sub-total	45.18	3.14	5.85	0.75	0.16	0.00	21.49	76.56
Aldi, Prestatyn	0.26	13.00	0.00	0.00	0.00	0.00	1.02	14.29
Lidl, Prestatyn	0.48	3.30	0.90	0.00	0.00	0.00	1.53	6.21
Tesco, Prestatyn	2.05	17.74	3.52	0.90	0.16	0.00	7.67	32.06
Other Prestatyn	0.12	5.24	0.76	0.09	0.00	0.00	7.67	13.88
Zone 2 - sub-total	2.91	39.29	5.18	0.99	0.16	0.00	17.91	66.44
Aldi, Rhuddlan	3.47	0.10	5.91	0.00	0.00	0.16	0.51	10.15
Other Rhuddlan	0.00	0.00	1.64	0.00	0.00	0.00	0.51	2.16
St Asaph	0.00	0.00	2.50	0.00	0.00	0.00	0.51	3.01
Other Zone 3	0.23	0.00	2.54	0.44	0.00	0.00	0.51	3.72
Zone 3 - sub-total	3.70	0.10	12.60	0.44	0.00	0.16	2.05	19.05
Aldi, Denbigh	0.72	0.00	2.78	7.41	0.00	0.00	1.02	11.94
Lidl, Denbigh	0.00	0.00	1.58	3.40	0.00	0.00	1.02	6.00
Morrison's, Denbigh	0.00	0.00	2.74	10.51	0.24	0.00	2.56	16.05
Other Denbigh	0.00	0.00	0.15	3.00	0.00	0.00	0.51	3.66
Other Zone 4	0.00	0.00	0.00	0.54	0.00	0.00	0.51	1.05
Zone 4 - sub-total	0.72	0.00	7.26	24.85	0.24	0.00	5.63	38.70
Aldi, Ruthin	0.00	0.43	0.40	1.68	9.19	0.27	0.51	12.49
Tesco, Ruthin	0.00	0.00	0.00	4.30	13.52	1.22	0.51	19.55
Other Ruthin	0.00	0.00	0.15	0.55	3.79	0.00	0.51	5.01
Other Zone 5	0.00	0.00	0.00	0.00	1.93	0.00	0.51	2.44

Denbighshire Town Centres Assessment - Final Report

Location / Zone	1	2	3	4	5	6	Tourists	Total
Zone 5 - sub-total	0.00	0.43	0.56	6.54	28.43	1.48	2.05	39.49
Aldi, Llangolan	0.26	0.00	0.00	0.00	0.33	8.61	0.51	9.71
Other Llangolan	0.12	0.00	0.00	0.00	0.00	2.73	0.51	3.36
Corwen	0.00	0.00	0.00	0.00	0.08	0.68	0.51	1.27
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.59	0.51	1.10
Zone 5 - sub-total	0.38	0.00	0.00	0.00	0.41	12.60	2.05	15.43
Denbighshire Total	52.90	42.96	31.44	33.57	29.41	14.24	51.16	255.68
Chester	0.00	0.00	0.19	0.00	0.29	0.00	n/a	0.47
Colwyn Bay	0.00	0.00	0.59	0.00	0.00	0.00	n/a	0.59
Kinmel Bay	5.23	0.55	2.71	0.00	0.00	0.00	n/a	8.49
Llandudno	0.00	0.00	0.00	0.00	0.36	0.19	n/a	0.55
Mold	0.00	0.00	0.83	0.00	3.73	0.00	n/a	4.56
Wrexham	0.00	0.00	0.00	0.34	1.70	2.78	n/a	4.82
Elsewhere	0.00	0.00	1.60	0.00	0.53	2.66	n/a	4.79
TOTAL	58.13	43.50	37.36	33.91	36.03	19.87	51.16	279.96

Source: Tables 3 and 4

Denbighshire Town Centres Assessment - Final Report

Table 9 – Convenience goods sales floorspace and benchmark turnover of main stores in Denbighshire.

Zone / Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Aldi, Wellington Road, Rhyl	935	80%	748	£10,904	£8.16
B&M Homestore	1,988	20%	398	£2,889	£1.15
Co-op, Ffordd Elan, Rhyl	244	95%	232	£11,301	£2.62
Co-op, Ty Fry Lane, Rhyl	178	95%	169	£6,665	£1.13
Farmfoods, Wellington Road	956	95%	908	£4,359	£3.96
Heron Foods, High Street Rhyl	344	95%	327	£4,359	£1.42
Home Bargains, Marsh Road, Rhyl	956	30%	287	£5,744	£1.65
Iceland, High Street, Rhyl	504	85%	428	£6,665	£2.86
Iceland, Clwyd Retail Park, Rhyl	372	95%	353	£6,665	£2.36
Morrisons, Marsh Road, Rhyl	3,775	70%	2,643	£12,150	£32.11
Sainsbury's, Rhyl Road, Rhyl	3,085	70%	2,160	£14,411	£31.12
Zone 1 - Rhyl sub-total	13,337		8,652		£88.52
Aldi, Meliden Road, Prestatyn	901	80%	721	£10,904	£7.86
Co-op, Ffordd Penrhwylyfa, Prestatyn	194	95%	184	£11,301	£2.08
Co-op, Victoria Road, Prestatyn	194	95%	184	£11,301	£2.08
Home Bargains, High Street, Prestatyn	958	30%	287	£5,744	£1.65
Iceland, High Street, Prestatyn	521	95%	495	£6,665	£3.30
Lidl, Pare Dyffryn, Prestatyn	1,682	80%	1,346	£8,730	£11.75
Marks & Spencer Foodhall	697	95%	662	£10,888	£7.21
Tesco, Prestatyn Shopping Centre	4,006	65%	2,604	£13,477	£35.09
Zone 2 - Prestatyn sub-total	9,153		6,483		£71.02
Aldi, Marsh Road, Rhuddlan	978	80%	782	£10,904	£8.53

Denbighshire Town Centres Assessment - Final Report

Zone / Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Co-op, Rhyl Road, Rhuddlan	84	95%	80	£6,665	£0.53
Co-op, St Asaph	308	95%	293	£6,665	£1.95
Zone 3 - sub-total	1,370		1,155		£11.01
Aldi, Station Road, Denbigh	1,114	80%	891	£10,904	£9.72
Co-op, High Street, Denbigh	297	95%	282	£11,301	£3.19
Home Bargains, Station Road, Denbigh	1,880	20%	376	£5,744	£2.16
Lidl, Vale Street, Denbigh	1,228	80%	982	£8,730	£8.58
Morrisons, Smithfield Road, Denbigh	1,978	80%	1,582	£12,150	£19.23
Zone 4 - sub-total	6,497		1,549		£42.87
Aldi, Denbigh Road, Ruthin	978	80%	782	£10,904	£8.53
B&M Bargains, Station Road, Ruthin	596	30%	179	£2,889	£0.52
Co-op, Station Road, Ruthin	508	95%	483	£11,301	£5.45
Morrisons Daily, Denbigh Road, Ruthin	113	95%	107	£12,150	£1.30
Tesco, Lon Parcwr, Ruthin	1,670	85%	1,420	£13,477	£19.13
Zone 5 - sub-total	3,865		2,971		£34.94
Aldi, Berwyn Street, Llangollen	1,153	80%	922	£10,904	£10.06
Co-op, Regents Street, Llangollen	287	95%	273	£11,301	£3.08
Home Bargains, Berwyn Street, Llangollen	991	30%	297	£5,744	£1.71
Nisa Local, London Road, Corwen	140	95%	133	£7,000	£0.93
Zone 6 - sub-total	2,571		1,625		£15.78
Total	36,793		22,436		£264.14

Source: ORC Storepoint 2023 and GlobalData company average sales densities 2022

Denbighshire Town Centres Assessment - Final Report

Table 10 – Summary of convenience good expenditure 2023 to 2038 (£m)

Available expenditure

Zone	2023	2028	2033	2038
1 - Rhyl	75.67	75.06	75.71	76.56
2 - Prestatyn	66.32	65.64	66.00	66.44
3 - Elwy	18.83	18.71	18.83	19.05
4 - Denbigh	38.00	37.83	38.15	38.70
5 - Ruthin	38.62	38.55	38.93	39.49
6 - Dee Valley	15.24	15.12	15.25	15.43
Total	252.69	250.90	252.87	255.68

Turnover of existing facilities

Zone	2023	2028	2033	2038
1 - Rhyl	75.67	78.10	78.18	78.18
2 - Prestatyn	66.32	68.45	68.52	68.52
3 - Elwy	18.83	19.44	19.46	19.46
4 - Denbigh	38.00	39.22	39.26	39.26
5 - Ruthin	38.62	39.86	39.90	39.90
6 - Dee Valley	15.24	15.73	15.74	15.74
Total	252.69	260.80	261.06	261.06

Denbighshire Town Centres Assessment - Final Report

Surplus/deficit expenditure £M

Zone	2023	2028	2033	2038
1 - Rhyl	0.00	-3.04	-2.47	-1.61
2 - Prestatyn	0.00	-2.81	-2.52	-2.09
3 - Elwy	0.00	-0.73	-0.63	-0.41
4 - Denbigh	0.00	-1.40	-1.11	-0.56
5 - Ruthin	0.00	-1.32	-0.97	-0.41
6 - Dee Valley	0.00	-0.61	-0.50	-0.31
Total	0.00	-9.91	-8.19	-5.39

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 20 – Figure 4a

Denbighshire Town Centres Assessment - Final Report

Table 11 – Convenience goods floorspace capacity up to 2038 (cumulative)

	2023	2028	2033	2038
Turnover density new floorspace (£ per sq.m)	£12,000	£12,385	£12,398	£12,398
Floorspace projection (sq.m net)				
Retail Zone	2023	2028	2033	2038
1 – Rhyl	0	-245	-199	-130
2 – Prestatyn	0	-227	-204	-169
3 – Elwy	0	-59	-50	-33
4 – Denbigh	0	-113	-89	-45
5 – Ruthin	0	-106	-78	-33
6 – Dee Valley	0	-49	-40	-25
Total	0	-800	-661	-435
Floorspace projection (sp.m gross)				
Retail Zone	2023	2028	2033	2038
1 – Rhyl	0	-351	-284	-186
2 – Prestatyn	0	-324	-291	-240
3 – Elwy	0	-85	-72	-47
4 – Denbigh	0	-161	-128	-65
5 – Ruthin	0	-152	-112	-47
6 – Dee Valley	0	-70	-57	-35
Total	0	-1,143	-994	-621

Source: Table 10 and Experian sales density growth rates from Retail Briefing Note 20 – Figure 4a.

Denbighshire Town Centres Assessment - Final Report

Appendix 4 Comparison retail capacity

Denbighshire Town Centres Assessment - Final Report

Table 1 – Study area population projections

Retail Zone	2023	2028	2033	2038
1 – Rhyl	26,881	27,061	27,286	27,518
2 – Prestatyn	18,883	18,925	18,965	18,963
3 – Elwy	15,412	15,510	15,547	15,629
4 – Denbigh	13,973	14,118	14,219	14,386
5 – Ruthin	13,680	13,845	13,940	14,067
6 – Dee Valley	7,826	7,866	7,909	7,970
Total	96,655	97,325	97,866	98,533
Tourists (daily average)	32,400	32,400	32,400	32,400

Sources: Experian population projections and Denbighshire Steam Final Trend Report 2011 – 2022.

Table 2 – Comparison goods expenditure per person per annum (£)

Retail Zone	2023	2028	2033	2038
1 – Rhyl	2,472	2,622	2,960	3,387
2 – Prestatyn	2,866	3,039	3,431	3,925
3 – Elwy	2,963	3,142	3,547	4,059
4 – Denbigh	2,792	2,961	3,343	3,825
5 – Ruthin	3,133	3,322	3,751	4,291
6 – Dee Valley	2,943	3,131	3,524	4,032
Tourist visitors	1,584	1,680	1,897	2,170

Sources: Experian Local Expenditure 2021 (2021 prices)

Experian growth rates – Retail Planner Briefing Note 20 (February 2023)

Excludes Special Forms of Trading (SFT)

Denbighshire Town Centres Assessment - Final Report

Table 3 – Total comparison goods expenditure (£m)

Retail Zone	2023	2028	2033	2038
1 – Rhyl	66.46	70.94	80.77	93.19
2 – Prestatyn	54.11	57.51	65.07	74.44
3 – Elwy	45.66	48.73	55.15	63.43
4 – Denbigh	39.01	41.80	47.53	55.02
5 – Ruthin	42.86	45.99	52.29	60.37
6 – Dee Valley	23.03	24.55	27.87	32.13
Total	271.13	289.53	328.68	378.59
Tourist visitors	21.32	54.42	61.45	70.30

Source: Table 1 and 2

Denbighshire Town Centres Assessment - Final Report

Table 4 – Base year 2023 comparison goods market shares by zone (%)

Location / Zone	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourist Visitors
Rhyl town centre	29.8%	8.0%	5.5%	3.1%	0.5%	0.0%	30.0%
Other Rhyl	33.4%	22.8%	24.5%	10.2%	2.8%	0.0%	5.0%
Prestatyn (inc. Shopping Park)	12.6%	49.3%	18.6%	8.7%	1.4%	0.0%	25.0%
Rhuddlan	1.4%	0.4%	2.4%	0.3%	0.0%	0.0%	1.0%
St Asaph	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	2.0%
Tweedmill Shopping Outlet	0.6%	2.0%	4.2%	4.5%	3.3%	0.3%	13.0%
Other Zone 3	0.4%	0.0%	0.6%	0.0%	0.0%	0.0%	1.0%
Denbigh town centre	0.5%	0.1%	3.2%	26.3%	3.1%	0.3%	10.0%
Other Denbigh / Zone 4	0.0%	0.0%	1.8%	3.6%	0.3%	0.2%	1.0%
Ruthin town centre	0.0%	0.0%	0.3%	8.4%	17.2%	1.7%	5.0%
Other Ruthin / Zone 5	0.0%	0.0%	0.0%	5.0%	13.2%	1.3%	1.0%
Llangollen	0.3%	0.0%	0.0%	0.0%	0.7%	21.5%	4.0%
Corwen	0.0%	0.0%	0.0%	0.0%	0.4%	3.0%	1.0%
Other Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	1.0%
Denbighshire Sub-total	79.1%	82.7%	62.4%	70.2%	42.8%	28.4%	100.0%
Chester	4.1%	6.9%	9.2%	11.6%	24.0%	9.6%	
Colwyn Bay	0.0%	0.2%	0.7%	0.0%	0.0%	0.0%	
Kinmel Bay	0.3%	0.3%	0.2%	0.4%	0.0%	0.0%	
Llandudno	6.3%	6.0%	11.1%	3.2%	1.0%	0.8%	
Mold	0.0%	0.0%	0.2%	2.2%	9.1%	0.3%	
Wrexham	0.3%	0.1%	0.5%	1.3%	13.0%	41.5%	
Elsewhere	9.9%	3.8%	15.8%	11.0%	10.1%	19.4%	

Denbighshire Town Centres Assessment - Final Report

Location / Zone	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourist Visitors
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household survey October 2023 and Lichfields analysis

Denbighshire Town Centres Assessment - Final Report

Table 5 – Base year 2023 comparison goods expenditure patterns by zone (£m)

Location / Zone	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Expenditure 2023	66.46	54.11	45.66	39.01	42.86	23.03	51.32	322.45
Rhyl town centre	19.82	4.31	2.52	1.21	0.21	0.00	15.40	43.46
Other Rhyl	22.21	12.34	11.18	3.98	1.19	0.00	2.57	53.47
Zone 1 - sub- total	42.04	16.65	13.70	5.19	1.40	0.00	17.96	96.93
Prestatyn (inc. Shopping Park)	8.40	26.69	8.49	3.39	0.58	0.00	12.83	60.38
Zone 2 - sub- total	8.40	26.69	8.49	3.39	0.58	0.00	12.83	60.38
Rhuddlan	0.90	0.23	1.09	0.10	0.00	0.00	0.51	2.84
St Asaph	0.00	0.00	0.56	0.00	0.00	0.00	1.03	1.58
Tweedmill Shopping Outlet	0.42	1.09	1.91	1.77	1.39	0.08	6.67	13.33
Other Zone 3	0.28	0.00	0.30	0.00	0.00	0.00	0.51	1.09
Zone 3 - sub- total	1.60	1.31	3.85	1.87	1.39	0.08	8.72	18.84
Denbigh town centre	0.33	0.07	1.48	10.28	1.34	0.07	5.13	18.69
Other Denbigh / Zone 4	0.00	0.00	0.83	1.42	0.12	0.04	0.51	2.92
Zone 4 - sub- total	0.33	0.07	2.32	11.70	1.45	0.10	5.65	21.61
Ruthin town centre	0.00	0.00	0.12	3.29	7.37	0.39	2.57	13.75
Other Ruthin / Zone 5	0.00	0.00	0.00	1.95	5.67	0.31	0.51	8.44
Zone 5 - sub- total	0.00	0.00	0.12	5.24	13.05	0.70	3.08	22.19
Llangollen	0.22	0.00	0.00	0.00	0.29	4.95	2.05	7.52
Corwen	0.00	0.00	0.00	0.00	0.19	0.69	0.51	1.40

Denbighshire Town Centres Assessment - Final Report

Location / Zone	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.01	0.51	0.53
Zone 6 - sub- total	0.22	0.00	0.00	0.00	0.48	5.66	3.08	9.45
Denbighshire Sub-total	52.59	44.72	28.48	27.40	18.36	6.54	51.32	229.41
Chester	2.71	3.73	4.21	4.54	10.31	2.22	n/a	27.71
Colwyn Bay	0.00	0.10	0.32	0.00	0.00	0.00	n/a	0.43
Kinmel Bay	0.21	0.14	0.08	0.17	0.00	0.00	n/a	0.60
Llandudno	4.17	3.27	5.07	1.26	0.41	0.18	n/a	14.36
Mold	0.00	0.00	0.09	0.86	3.89	0.07	n/a	4.91
Wrexham	0.22	0.08	0.23	0.50	5.56	9.56	n/a	16.14
Elsewhere	6.55	2.07	7.19	4.28	4.33	4.47	n/a	28.90
Total	66.46	54.11	45.66	39.01	42.86	23.03	n/a	322.45

Source: Tables 3 and 4

Denbighshire Town Centres Assessment - Final Report

Table 6 – Future 2028 comparison goods expenditure patterns by zone (£m)

Location / Zone	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Expenditure 2028	70.94	57.51	48.73	41.80	45.99	24.55	54.42	343.95
Rhyl town centre	21.16	4.58	2.69	1.29	0.23	0.00	16.33	46.27
Other Rhyl	23.71	13.12	11.93	4.27	1.27	0.00	2.72	57.02
Zone 1 - sub- total	44.88	17.69	14.62	5.56	1.50	0.00	19.05	103.30
Prestatyn (inc. Shopping Park)	8.97	28.37	9.06	3.63	0.62	0.00	13.61	64.26
Zone 2 - sub- total	8.97	28.37	9.06	3.63	0.62	0.00	13.61	64.26
Rhuddlan	0.96	0.24	1.16	0.11	0.00	0.00	0.54	3.02
St Asaph	0.00	0.00	0.59	0.00	0.00	0.00	1.09	1.68
Tweedmill Shopping Outlet	0.44	1.15	2.04	1.90	1.50	0.08	7.07	14.19
Other Zone 3	0.30	0.00	0.32	0.00	0.00	0.00	0.54	1.16
Zone 3 - sub- total	1.71	1.40	4.11	2.00	1.50	0.08	9.25	20.05
Denbigh town centre	0.35	0.07	1.58	11.01	1.43	0.07	5.44	19.97
Other Denbigh / Zone 4	0.00	0.00	0.89	1.52	0.13	0.04	0.54	3.12
Zone 4 - sub- total	0.35	0.07	2.47	12.53	1.56	0.11	5.99	23.09
Ruthin town centre	0.00	0.00	0.13	3.53	7.91	0.42	2.72	14.71
Other Ruthin / Zone 5	0.00	0.00	0.00	2.09	6.09	0.33	0.54	9.05
Zone 5 - sub- total	0.00	0.00	0.13	5.62	14.00	0.74	3.27	23.76
Llangollen	0.24	0.00	0.00	0.00	0.31	5.28	2.18	8.01
Corwen	0.00	0.00	0.00	0.00	0.21	0.74	0.54	1.49

Denbighshire Town Centres Assessment - Final Report

Location / Zone	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.01	0.54	0.56
Zone 6 - sub- total	0.24	0.00	0.00	0.00	0.52	6.03	3.27	10.06
Denbighshire Sub-total	56.14	47.53	30.39	29.35	19.70	6.97	54.42	244.51
Chester	2.90	3.96	4.49	4.87	11.06	2.36	n/a	29.64
Colwyn Bay	0.00	0.11	0.34	0.00	0.00	0.00	n/a	0.45
Kinmel Bay	0.23	0.15	0.09	0.18	0.00	0.00	n/a	0.64
Llandudno	4.45	3.48	5.41	1.35	0.44	0.19	n/a	15.32
Mold	0.00	0.00	0.10	0.93	4.17	0.07	n/a	5.27
Wrexham	0.24	0.08	0.24	0.53	5.96	10.19	n/a	17.25
Elsewhere	6.99	2.20	7.68	4.59	4.65	4.77	n/a	30.87
Total	70.94	57.51	48.73	41.80	45.99	24.55	n/a	343.95

Source: Tables 3 and 4

Denbighshire Town Centres Assessment - Final Report

Table 7 - Future 2033 comparison goods expenditure patterns by zone (£m)

Location / Zone	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Expenditure 2033	80.77	65.07	55.15	47.53	52.29	27.87	61.45	390.12
Rhyl town centre	24.09	5.18	3.04	1.47	0.26	0.00	18.43	52.47
Other Rhyl	27.00	14.84	13.50	4.85	1.45	0.00	3.07	64.71
Zone 1 - sub- total	51.09	20.02	16.54	6.33	1.71	0.00	21.51	117.19
Prestatyn (inc. Shopping Park)	10.21	32.10	10.25	4.13	0.71	0.00	15.36	72.76
Zone 2 - sub- total	10.21	32.10	10.25	4.13	0.71	0.00	15.36	72.76
Rhuddlan	1.10	0.28	1.32	0.12	0.00	0.00	0.61	3.43
St Asaph	0.00	0.00	0.67	0.00	0.00	0.00	1.23	1.90
Tweedmill Shopping Outlet	0.50	1.31	2.31	2.16	1.70	0.10	7.99	16.06
Other Zone 3	0.34	0.00	0.36	0.00	0.00	0.00	0.61	1.31
Zone 3 - sub- total	1.94	1.58	4.66	2.28	1.70	0.10	10.45	22.70
Denbigh town centre	0.40	0.08	1.79	12.52	1.63	0.08	6.14	22.65
Other Denbigh / Zone 4	0.00	0.00	1.01	1.73	0.14	0.04	0.61	3.54
Zone 4 - sub- total	0.40	0.08	2.80	14.25	1.77	0.12	6.76	26.19
Ruthin town centre	0.00	0.00	0.15	4.01	8.99	0.47	3.07	16.70
Other Ruthin / Zone 5	0.00	0.00	0.00	2.38	6.92	0.37	0.61	10.28
Zone 5 - sub- total	0.00	0.00	0.15	6.39	15.92	0.84	3.69	26.99
Llangollen	0.27	0.00	0.00	0.00	0.36	6.00	2.46	9.08
Corwen	0.00	0.00	0.00	0.00	0.23	0.84	0.61	1.69

Denbighshire Town Centres Assessment - Final Report

Location / Zone	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.02	0.61	0.63
Zone 6 - sub- total	0.27	0.00	0.00	0.00	0.59	6.85	3.69	11.40
Denbighshire Sub-total	63.91	53.78	34.39	33.38	22.40	7.91	61.45	277.23
Chester	3.30	4.48	5.08	5.54	12.57	2.68	n/a	33.65
Colwyn Bay	0.00	0.12	0.39	0.00	0.00	0.00	n/a	0.51
Kinmel Bay	0.26	0.17	0.10	0.20	0.00	0.00	n/a	0.73
Llandudno	5.07	3.93	6.12	1.54	0.50	0.22	n/a	17.37
Mold	0.00	0.00	0.11	1.05	4.75	0.08	n/a	5.99
Wrexham	0.27	0.09	0.27	0.61	6.78	11.57	n/a	19.59
Elsewhere	7.96	2.48	8.69	5.22	5.29	5.41	n/a	35.05
Total	80.77	65.07	55.15	47.53	52.29	27.87	n/a	390.12

Source: Tables 3 and 4

Denbighshire Town Centres Assessment - Final Report

Table 8 - Future 2038 comparison goods expenditure patterns by zone (£m)

Location / Zone	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Expenditure 2038	93.19	74.44	63.43	55.02	60.37	32.13	70.30	448.89
Rhyl town centre	27.80	5.92	3.50	1.70	0.30	0.00	21.09	60.31
Other Rhyl	31.15	16.98	15.53	5.62	1.67	0.00	3.52	74.46
Zone 1 - sub- total	58.95	22.90	19.03	7.32	1.97	0.00	24.61	134.78
Prestatyn (inc. Shopping Park)	11.78	36.72	11.79	4.78	0.82	0.00	17.58	83.47
Zone 2 - sub- total	11.78	36.72	11.79	4.78	0.82	0.00	17.58	83.47
Rhuddlan	1.27	0.31	1.51	0.14	0.00	0.00	0.70	3.94
St Asaph	0.00	0.00	0.77	0.00	0.00	0.00	1.41	2.18
Tweedmill Shopping Outlet	0.58	1.49	2.66	2.50	1.96	0.11	9.14	18.44
Other Zone 3	0.39	0.00	0.41	0.00	0.00	0.00	0.70	1.51
Zone 3 - sub- total	2.24	1.81	5.35	2.64	1.96	0.11	11.95	26.07
Denbigh town centre	0.46	0.10	2.06	14.50	1.88	0.09	7.03	26.12
Other Denbigh / Zone 4	0.00	0.00	1.16	2.00	0.17	0.05	0.70	4.08
Zone 4 - sub- total	0.46	0.10	3.22	16.50	2.05	0.14	7.73	30.20
Ruthin town centre	0.00	0.00	0.17	4.65	10.38	0.55	3.52	19.26
Other Ruthin / Zone 5	0.00	0.00	0.00	2.75	7.99	0.43	0.70	11.87
Zone 5 - sub- total	0.00	0.00	0.17	7.40	18.38	0.97	4.22	31.14
Llangollen	0.31	0.00	0.00	0.00	0.41	6.91	2.81	10.45
Corwen	0.00	0.00	0.00	0.00	0.27	0.97	0.70	1.94

Denbighshire Town Centres Assessment - Final Report

Location / Zone	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.02	0.70	0.72
Zone 6 - sub- total	0.31	0.00	0.00	0.00	0.68	7.90	4.22	13.11
Denbighshire Sub-total	73.75	61.53	39.56	38.64	25.86	9.12	70.30	318.76
Chester	3.81	5.13	5.84	6.41	14.52	3.09	n/a	38.79
Colwyn Bay	0.00	0.14	0.45	0.00	0.00	0.00	n/a	0.59
Kinmel Bay	0.30	0.19	0.11	0.24	0.00	0.00	n/a	0.84
Llandudno	5.84	4.50	7.04	1.78	0.58	0.25	n/a	19.99
Mold	0.00	0.00	0.13	1.22	5.48	0.09	n/a	6.92
Wrexham	0.31	0.11	0.31	0.70	7.83	13.34	n/a	22.60
Elsewhere	9.19	2.84	9.99	6.04	6.11	6.24	n/a	40.41
Total	93.19	74.44	63.43	55.02	60.37	32.13	n/a	448.89

Source: Tables 3 and 4

Denbighshire Town Centres Assessment - Final Report

Table 9 – Summary of comparison goods expenditure 2023 to 2038 (£m)

Available expenditure

Retail Zone	2023	2028	2033	2038
1 - Rhyl	96.93	103.30	117.19	134.78
2 - Prestatyn	60.38	64.26	72.76	83.47
3 - Elwy	18.84	20.05	22.70	26.07
4. Denbigh	21.61	23.09	26.19	30.20
5 - Ruthin	22.19	23.76	26.99	31.14
6 - Dee Valley	9.45	10.06	11.40	13.11
Total	229.41	244.51	277.23	318.76

Turnover of existing facilities

Retail Zone	2023	2028	2033	2038
1 - Rhyl	96.93	104.51	119.04	136.67
2 - Prestatyn	60.38	65.10	74.16	85.14
3 - Elwy	18.84	20.31	23.13	26.56
4 - Denbigh	21.61	23.30	26.54	30.47
5 - Ruthin	22.19	23.92	27.25	31.29
6 - Dee Valley	9.45	10.19	11.60	13.32
Total	229.41	247.32	281.73	323.45

Denbighshire Town Centres Assessment - Final Report

Surplus/deficit expenditure £M

Zone	2023	2028	2033	2038
1 - Rhyl	0.00	-1.12	-1.86	-1.89
2 - Prestatyn	0.00	-0.84	-1.40	-1.67
3 - Elwy	0.00	-0.25	-0.43	-0.49
4 - Denbigh	0.00	-0.22	-0.35	-0.28
5 - Ruthin	0.00	-0.16	-0.27	-0.15
6 - Dee Valley	0.00	-0.13	-0.20	-0.21
Total	0.00	-2.81	-4.51	-4.69

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 20 – Figure 4b

Denbighshire Town Centres Assessment - Final Report

Table 10 – Comparison goods floorspace capacity up to 2038 (cumulative)

	2023	2028	2033	2038
Turnover density new floorspace (£ per sq.m)	£6,000	£6,469	£7,369	£8,460
Floorspace projection (sq.m net)				
Zone	2023	2028	2033	2038
1 – Rhyl	0	-187	-252	-224
2 – Prestatyn	0	-130	-189	-197
3 – Elwy	0	-39	-59	-58
4 – Denbigh	0	-33	-48	-33
5 – Ruthin	0	-25	-36	-18
6 – Dee Valley	0	-20	-28	-25
Total	0	-435	-612	-555
Floorspace projection (sp.m gross)				
Zone	2023	2028	2033	2038
1 – Rhyl	0	-249	-336	-299
2 – Prestatyn	0	-174	-253	-263
3 – Elwy	0	-52	-78	-77
4 – Denbigh	0	-45	-64	-44
5 – Ruthin	0	-34	-48	-24
6 – Dee Valley	0	-26	-37	-33
Total	0	-580	-816	-739

Source: Table 9 and Experian sales density growth rates from Retail Briefing Note 20 – Figure 4b.

Denbighshire Town Centres Assessment - Final Report

Appendix 5 Food / Beverage Capacity

Denbighshire Town Centres Assessment - Final Report

Table 1 – Study area population projections

Retail Zone	2023	2028	2033	2038
1 – Rhyl	26,881	27,061	27,286	27,518
2 – Prestatyn	18,883	18,925	18,965	18,963
3 – Elwy	15,412	15,510	15,547	15,629
4 – Denbigh	13,973	14,118	14,219	14,386
5 – Ruthin	13,680	13,845	13,940	14,067
6 – Dee Valley	7,826	7,866	7,909	7,970
Total	96,655	97,325	97,866	98,533
Tourists (daily average)	32,400	32,400	32,400	32,400

Sources: Experian population projections and Denbighshire Steam Final Trend Report 2011 – 2022.

Table 2 – Food and beverage expenditure per person per annum (£)

Retail Zone	2023	2028	2033	2038
1 – Rhyl	1,314	1,364	1,428	1,494
2 – Prestatyn	1,518	1,576	1,650	1,726
3 – Elwy	1,521	1,580	1,654	1,730
4 – Denbigh	1,418	1,473	1,542	1,612
5 – Ruthin	1,571	1,632	1,708	1,786
6 – Dee Valley	1,478	1,535	1,606	1,680
Tourist visitors	4,088	4,246	4,442	4,647

Sources: Experian Local Expenditure 2021 (2021 prices)

Experian growth rates – Retail Planner Briefing Note 20 (February 2023)

Denbighshire Town Centres Assessment - Final Report

Table 3 – Total food and beverage expenditure (£m)

Retail Zone	2023	2028	2033	2038
1 – Rhyl	35.32	36.91	38.96	41.11
2 – Prestatyn	28.66	29.83	31.29	32.73
3 – Elwy	23.44	24.51	25.71	27.04
4 – Denbigh	19.81	20.80	21.93	23.19
5 – Ruthin	21.49	22.60	23.81	25.12
6 – Dee Valley	11.57	12.07	12.70	13.39
Total	140.30	146.71	154.41	162.58
Tourist visitors	132.45	137.56	143.92	150.55

Source: Table 1 and 2

Denbighshire Town Centres Assessment - Final Report

Table 4 – Base year 2023 food and beverage market shares by zone (%)

Destination	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourist Visitors
Rhyl	46.3%	5.4%	5.0%	5.2%	0.7%	0.0%	25.0%
Prestatyn	17.8%	53.6%	16.7%	3.2%	0.0%	0.0%	20.0%
Rhuddlan	0.8%	4.9%	9.2%	5.5%	0.0%	0.0%	5.0%
St Asaph	4.8%	6.8%	14.1%	14.3%	0.9%	0.0%	5.0%
Other Zone 3	5.4%	2.6%	18.3%	7.2%	2.9%	0.0%	5.0%
Denbigh	0.0%	0.0%	3.5%	25.9%	0.0%	0.0%	10.0%
Other Zone 4	0.0%	0.0%	0.0%	6.0%	2.8%	0.0%	2.0%
Ruthin	1.4%	1.9%	1.8%	11.5%	32.8%	2.3%	10.0%
Other Zone 5	0.0%	0.0%	0.7%	3.6%	12.3%	0.7%	4.0%
Corwen	1.5%	0.0%	0.0%	0.0%	0.0%	0.9%	2.0%
Llangollen	0.7%	0.0%	0.0%	0.8%	0.7%	52.0%	10.0%
Other Zone 6	0.0%	0.0%	0.0%	0.0%	3.6%	5.5%	2.0%
Denbighshire total	78.7%	75.2%	69.3%	83.2%	56.7%	61.4%	100.0%
Chester	0.0%	7.6%	6.6%	2.1%	1.4%	4.7%	n/a
Colwyn Bay	0.0%	0.6%	1.6%	1.7%	0.0%	0.0%	n/a
Kinmel Bay	6.8%	0.0%	1.3%	0.0%	0.0%	0.0%	n/a
Llandudno	1.5%	2.3%	2.9%	0.0%	0.0%	0.0%	n/a
Mold	0.7%	0.3%	0.6%	0.8%	9.0%	1.1%	n/a
Wrexham	0.0%	0.0%	0.0%	0.0%	3.5%	5.0%	n/a
Elsewhere	12.3%	14.0%	17.7%	12.2%	29.4%	27.8%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey October 2023 and Lichfields' analysis

Denbighshire Town Centres Assessment - Final Report

Table 5 – Base year 2023 food and beverage expenditure patterns by zone (£m)

Destination	1 – Rhyl	2 – Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Expenditure 2023	35.32	28.66	23.44	19.81	21.49	11.57	132.45	272.75
Rhyl	16.35	1.55	1.17	1.03	0.15	0.00	33.11	53.37
Zone 1 - sub- total	16.35	1.55	1.17	1.03	0.15	0.00	33.11	53.37
Prestatyn	6.29	15.36	3.91	0.63	0.00	0.00	26.49	52.69
Zone 2 - sub- total	6.29	15.36	3.91	0.63	0.00	0.00	26.49	52.69
Rhuddlan	0.28	1.40	2.16	1.09	0.00	0.00	6.62	11.56
St Asaph	1.70	1.95	3.31	2.83	0.19	0.00	6.62	16.60
Other Zone 3	1.91	0.75	4.29	1.43	0.62	0.00	6.62	15.61
Zone 3 – Sub Total	3.89	4.10	9.75	5.35	0.82	0.00	19.87	43.77
Denbigh	0.00	0.00	0.82	5.13	0.00	0.00	13.25	19.20
Other Zone 4	0.00	0.00	0.00	1.19	0.60	0.00	2.65	4.44
Zone 4 – Sub Total	0.00	0.00	0.82	6.32	0.60	0.00	15.89	23.64
Ruthin	0.49	0.54	0.42	2.28	7.05	0.27	13.25	24.30
Other Zone 5	0.00	0.00	0.16	0.71	2.64	0.08	5.30	8.90
Zone 5 – Sub Total	0.49	0.54	0.59	2.99	9.69	0.35	18.54	33.20
Corwen	0.53	0.00	0.00	0.00	0.00	0.10	2.65	3.28
Llangollen	0.25	0.00	0.00	0.16	0.15	6.01	13.25	19.82
Other Zone 6	0.00	0.00	0.00	0.00	0.77	0.64	2.65	4.06
Zone 6 – Sub Total	0.78	0.00	0.00	0.16	0.92	6.76	18.54	27.16
Denbighshire Total	27.80	21.56	16.25	16.49	12.19	7.10	132.45	233.82
Chester	0.00	2.18	1.55	0.42	0.30	0.54	n/a	4.99

Denbighshire Town Centres Assessment - Final Report

Destination	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Colwyn Bay	0.00	0.17	0.38	0.34	0.00	0.00	n/a	0.88
Kinmel Bay	2.40	0.00	0.30	0.00	0.00	0.00	n/a	2.71
Llandudno	0.53	0.66	0.68	0.00	0.00	0.00	n/a	1.87
Mold	0.25	0.09	0.14	0.16	1.93	0.13	n/a	2.69
Wrexham	0.00	0.00	0.00	0.00	0.75	0.58	n/a	1.33
Elsewhere	4.34	4.01	4.15	2.42	6.32	3.22	n/a	24.46
TOTAL	35.32	28.66	23.44	19.81	21.49	11.57	132.45	272.75

Source: Tables 3 and 4

Denbighshire Town Centres Assessment - Final Report

Table 6 – Future 2028 food and beverage expenditure patterns by zone (£m)

Destination	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Expenditure 2028	36.91	29.83	24.51	20.80	22.60	12.07	137.56	284.27
Rhyl	17.09	1.61	1.23	1.08	0.16	0.00	34.39	55.56
Zone 1 - sub- total	17.09	1.61	1.023	1.08	0.16	0.00	34.39	55.56
Prestatyn	6.57	15.99	4.09	0.67	0.00	0.00	27.51	54.83
Zone 2 - sub- total	6.57	15.99	4.09	0.67	0.00	0.00	27.51	54.83
Rhuddlan	0.30	1.46	2.25	1.14	0.00	0.00	6.88	12.03
St Asaph	1.77	2.03	3.46	2.97	0.20	0.00	6.88	17.31
Other Zone 3	1.99	0.78	4.48	1.50	0.66	0.00	6.88	16.28
Zone 3 – Sub Total	4.06	4.27	10.19	5.61	0.86	0.00	20.63	45.63
Denbigh	0.00	0.00	0.86	5.39	0.00	0.00	13.76	20.00
Other zone 4	0.00	0.00	0.00	1.25	0.63	0.00	2.75	4.63
Zone 4 – Sub Total	0.00	0.00	0.86	6.63	0.63	0.00	16.51	24.63
Ruthin	0.52	0.57	0.44	2.39	7.41	0.28	13.76	25.36
Other Zone 5	0.00	0.00	0.17	0.75	2.78	0.08	5.50	9.29
Zone 5 – Sub Total	0.52	0.57	0.61	3.14	10.19	0.36	19.26	34.65
Corwen	0.55	0.00	0.00	0.00	0.00	0.11	2.75	3.41
Llangollen	0.26	0.00	0.00	0.17	0.16	6.28	13.76	20.62
Other Zone 6	0.00	0.00	0.00	0.00	0.81	0.66	2.75	4.23
Zone 6 – Sub Total	0.81	0.00	0.00	0.17	0.97	7.05	19.26	28.26
Denbighshire Total	29.05	22.43	16.98	17.30	12.81	7.41	137.56	243.55
Chester	0.00	2.27	1.62	0.44	0.32	0.57	n/a	5.20

Denbighshire Town Centres Assessment - Final Report

Destination	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Colwyn Bay	0.00	0.18	0.39	0.35	0.00	0.00	n/a	0.92
Kinmel Bay	2.51	0.00	0.32	0.00	0.00	0.00	n/a	2.83
Llandudno	0.55	0.69	0.71	0.00	0.00	0.00	n/a	1.95
Mold	0.26	0.09	0.15	0.17	2.03	0.13	n/a	2.83
Wrexham	0.00	0.00	0.00	0.00	0.79	0.60	n/a	1.39
Elsewhere	4.54	4.18	4.34	2.54	6.64	3.36	n/a	25.59
TOTAL	36.91	29.83	24.51	20.80	22.60	12.07	137.56	284.27

Source: Tables 3 and 4

Denbighshire Town Centres Assessment - Final Report

Table 7 - Future 2033 food and beverage expenditure patterns by zone (£m)

Destination	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Expenditure 2033	38.96	31.29	25.71	21.93	23.81	12.70	143.92	298.33
Rhyl	18.04	1.69	1.29	1.14	0.17	0.00	35.98	58.30
Zone 1 - sub- total	18.04	1.69	1.29	1.14	0.17	0.00	35.98	58.30
Prestatyn	6.94	16.77	4.29	0.70	0.00	0.00	28.78	57.49
Zone 2 - sub- total	6.94	16.77	4.29	0.70	0.00	0.00	28.78	57.49
Rhuddlan	0.31	1.53	2.37	1.21	0.00	0.00	7.20	12.61
St Asaph	1.87	2.13	3.63	3.14	0.21	0.00	7.20	18.17
Other Zone 3	2.10	0.81	4.71	1.58	0.69	0.00	7.20	17.09
Zone 3 – Sub Total	4.29	4.47	10.70	5.92	0.90	0.00	21.59	47.87
Denbigh	0.00	0.00	0.90	5.68	0.00	0.00	14.39	20.97
Other zone 4	0.00	0.00	0.00	1.32	0.67	0.00	2.88	4.86
Zone 4 – Sub Total	0.00	0.00	0.90	6.99	0.67	0.00	17.27	25.83
Ruthin	0.55	0.59	0.46	2.52	7.81	0.29	14.39	26.62
Other Zone 5	0.00	0.00	0.18	0.79	2.93	0.09	5.76	9.74
Zone 5 – Sub Total	0.55	0.59	0.64	3.31	10.74	0.38	20.15	36.36
Corwen	0.58	0.00	0.00	0.00	0.00	0.11	2.88	3.58
Llangollen	0.27	0.00	0.00	0.18	0.17	6.60	14.39	21.61
Other Zone 6	0.00	0.00	0.00	0.00	0.86	0.70	2.88	4.43
Zone 6 – Sub Total	0.86	0.00	0.00	0.18	1.02	7.42	20.15	29.62
Denbighshire Total	30.66	23.53	17.82	18.24	13.50	7.80	143.92	255.48
Chester	0.00	2.38	1.70	0.46	0.33	0.60	n/a	5.47

Denbighshire Town Centres Assessment - Final Report

Destination	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Colwyn Bay	0.00	0.19	0.41	0.37	0.00	0.00	n/a	0.97
Kinmel Bay	2.65	0.00	0.33	0.00	0.00	0.00	n/a	2.98
Llandudno	0.58	0.72	0.75	0.00	0.00	0.00	n/a	2.05
Mold	0.27	0.09	0.15	0.18	2.14	0.14	n/a	2.98
Wrexham	0.00	0.00	0.00	0.00	0.83	0.64	n/a	1.47
Elsewhere	4.79	4.38	4.55	2.67	7.00	3.53	n/a	26.93
TOTAL	38.96	31.29	25.71	21.93	23.81	12.70	143.92	298.33

Source: Tables 3 and 4

Denbighshire Town Centres Assessment - Final Report

Table 8 - Future 2038 food and beverage expenditure patterns by zone (£m)

Destination	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Expenditure 2038	41.11	32.73	27.04	23.19	25.12	13.39	15.55	313.14
Rhyl	19.03	1.77	1.35	1.21	0.18	0.00	37.64	61.17
Zone 1 - sub- total	19.03	1.77	1.35	1.21	0.18	0.00	37.64	61.17
Prestatyn	7.32	17.54	4.52	0.74	0.00	0.00	30.11	60.23
Zone 2 - sub- total	7.32	17.54	4.52	0.74	0.00	0.00	30.11	60.23
Rhuddlan	0.33	1.60	2.49	1.28	0.00	0.00	7.53	13.22
St Asaph	1.97	2.23	3.81	3.32	0.23	0.00	7.53	19.08
Other Zone 3	2.22	0.85	4.95	1.67	0.73	0.00	7.53	17.94
Zone 3 – Sub Total	4.52	4.68	11.25	6.26	0.95	0.00	22.58	50.25
Denbigh	0.00	0.00	0.95	6.01	0.00	0.00	15.06	22.01
Other zone 4	0.00	0.00	0.00	1.39	0.70	0.00	3.01	5.11
Zone 4 – Sub Total	0.00	0.00	0.95	7.40	0.70	0.00	18.07	27.11
Ruthin	0.58	0.62	0.49	2.67	8.24	0.31	15.06	27.95
Other Zone 5	0.00	0.00	0.19	0.83	3.09	0.09	6.02	10.23
Zone 5 – Sub Total	0.58	0.62	0.68	3.50	11.33	0.40	21.08	38.19
Corwen	0.62	0.00	0.00	0.00	0.00	0.12	3.01	3.75
Llangollen	0.29	0.00	0.00	0.19	0.18	6.96	15.06	22.67
Other Zone 6	0.00	0.00	0.00	0.00	0.90	0.74	3.01	4.65
Zone 6 – Sub Total	0.90	0.00	0.00	0.19	1.08	7.82	21.08	31.07
Denbighshire Total	32.36	24.61	18.74	13.29	14.25	8.22	150.55	268.02
Chester	0.00	2.49	1.78	0.49	0.35	0.63	n/a	5.74

Denbighshire Town Centres Assessment - Final Report

Destination	1 – Rhyl	2 - Prestatyn	3 – Elwy	4 – Denbigh	5 – Ruthin	6 – Dee Valley	Tourists	Total
Colwyn Bay	0.00	0.20	0.43	0.39	0.00	0.00	n/a	1.02
Kinmel Bay	2.80	0.00	0.35	0.00	0.00	0.00	n/a	3.15
Llandudno	0.62	0.75	0.78	0.00	0.00	0.00	n/a	2.15
Mold	0.29	0.10	0.16	0.19	2.26	0.15	n/a	3.14
Wrexham	0.00	0.00	0.00	0.00	0.88	0.67	n/a	1.55
Elsewhere	5.06	4.58	4.79	2.83	7.39	3.72	n/a	28.36
TOTAL	41.11	32.73	27.04	23.19	25.12	13.39	150.55	313.14

Source: Tables 3 and 4

Denbighshire Town Centres Assessment - Final Report

Table 9 – Food and beverage outlets in Denbighshire

Centre	Coffee Shop	Café / Restaurants	Pubs bar	Hot food takeaway	Total
Rhyl	2	17	10	15	44
Prestatyn	2	16	5	9	32
Rhuddlan	1	4	1	2	8
St Asaph	0	2	2	5	9
Denbigh	1	4	2	4	11
Ruthin	2	7	6	3	18
Corwen	0	4	0	3	7
Llangollen	2	17	5	4	28
Total	10	71	31	45	157

Source: Denbighshire Council Land Use Survey 2023

Denbighshire Town Centres Assessment - Final Report

Table 10 – Summary of food and beverage expenditure 2023 to 2038

Available expenditure

Retail Zone	2023	2028	2033	2038
1 - Rhyl	53.37	55.56	58.60	61.17
2 - Prestatyn	52.69	54.83	57.49	60.23
3 - Elwy	43.77	45.63	47.87	50.25
4. Denbigh	23.64	24.63	25.83	27.11
5 - Ruthin	33.20	34.65	36.36	38.19
6 - Dee Valley	27.16	28.26	29.62	31.07
Total	233.82	243.55	255.48	258.02

Turnover of existing facilities

Retail Zone	2023	2028	2033	2038
1 - Rhyl	53.37	53.85	54.50	55.04
2 - Prestatyn	52.69	53.16	53.80	54.34
3 - Elwy	43.77	44.16	44.70	45.14
4 - Denbigh	23.64	23.85	24.14	24.38
5 - Ruthin	33.20	33.50	33.90	34.24
6 - Dee Valley	27.16	27.40	27.73	28.01
Total	233.82	235.92	238.77	241.16

Denbighshire Town Centres Assessment - Final Report

Surplus/deficit expenditure £M

Retail Zone	2023	2028	2033	2038
1 - Rhyl	0.00	1.71	3.81	6.13
2 - Prestatyn	0.00	1.66	3.68	5.88
3 - Elwy	0.00	1.46	3.18	5.11
4 - Denbigh	0.00	0.78	1.69	2.73
5 - Ruthin	0.00	1.15	2.46	3.94
6 - Dee Valley	0.00	0.86	1.89	3.06
Total	0.00	7.62	16.71	26.85

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing
Note 20 – Leisure

Denbighshire Town Centres Assessment - Final Report

Table 11 – Food and beverage capacity up to 2038 (cumulative)

	2023	2028	2033	2038
Turnover density new floorspace (£ per sq.m)	£6,000	£6,054	£6,127	£6,188
Floorspace projection (sq.m net)				
Retail Zone	2023	2028	2033	2038
1 – Rhyl	0	282	621	991
2 – Prestatyn	0	275	601	951
3 – Elwy	0	242	518	825
4 – Denbigh	0	129	277	442
5 – Ruthin	0	190	402	637
6 – Dee Valley	0	142	309	494
Total	0	1,259	2,728	4,340

Source: Table 9 and Experian sales density growth rates from Retail Planner Briefing Note 20 – Leisure.

Denbighshire Town Centres Assessment - Final Report

Glossary

Benchmark turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Class A1

Commercial units/premises classed as retail or shop uses.

Class A2

Commercial units/premises classed as financial or professional services, e.g. banks and building societies.

Class A3

Commercial units/premises classed as restaurants, café, public house/bar or hot food takeaway outlets.

Convenience goods

Consumer goods purchased on a regular basis e.g. food/groceries and cleaning materials.

Comparison goods

Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian

A data consultancy widely used for retail and leisure planning information.

Food and beverage

Classes A3 food and drink outlets, selling food and drinks consumed away from the home or hot food takeaway food but not food and grocery items including convenience goods.

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GlobalData

A market research and data consultancy widely used for retail planning information, previously Verdict Research.

Goad Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,300 town centres across the UK.

Gross floorspace

Total external floorspace including exterior walls.

Market share/Penetration rate

The proportion of total consumer expenditure within a given area taken by a particular town centre, destination or shopping/leisure facility.

Multi-channel shopping

Products made available to consumers on more than one sales channel, such as ecommerce websites, brick-and-mortar stores, marketplaces, comparison shopping engines, social media platforms, and other online channels.

Multiplex cinema

A cinema complex with five or more screens.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other areas not accessible to customers.

Oxford Retail Consultants (ORC)

A data consultancy widely used for retail planning information.

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Special forms of trading (SFT)

Retail sales via the internet, mail order, stalls and markets, door-to-door and telephone sales, including on-line sales by supermarkets, department stores and catalogue companies.

Denbighshire Town Centres Assessment - Final Report

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205

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