PLANNING COMMITTEE
MEETING - 26th March 2003
Agenda Item: 2

TOWN AND COUNTRY PLANNING ACT 1990
TOWN AND COUNTRY PLANNING (GENERAL PERMITTED DEVELOPMENT PROCEDURE) ORDER 1995 - TO DATE
PLANNING AND COMPENSATION ACT 1991
TOWN AND COUNTRY PLANNING ADVERT REGULATIONS 1994
PLANNING (LISTED BUILDINGS AND CONSERVATION AREAS) ACT 1990
APPLICATIONS FOR PERMISSION FOR DEVELOPMENT

These are reports and recommendations by Officers for consideration and resolution by the County Planning Authority.
All the applications in respect of the proposals specified in this report will be available for inspection by the Members of the Committee prior to and during the meeting at which the said applications will be considered.
The Background Papers relating to each application, including forms, plans, relevant correspondence, Development Plan and guidance documents are available for public inspection during normal office hours

PLANNING COMMITTEE
MEETING: 26th March 2003
Agenda Item: 3

ENFORCEMENT MATTERS

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COPIES OF APPENDIX AVAILABLE FROM HEAD OF PLANNING SERVICES

PLANNING COMMITTEE
26TH March 2003

ITEM NO. 4

REPORT BY HEAD OF PLANNING SERVICES

DENBIGHSHIRE RETAIL AND LEISURE STUDY 2003

1. PURPOSE OF THE REPORT

1.1 Denbighshire Planning Services appointed consultants Roger Tym & Partners to undertake a county-wide Retail Study to update the County's retail planning policies and proposals primarily for development plan and development control purposes. This Study is now complete and a copy of the Executive Summary is attached as Appendix 1 to this report. Copies of the Main Report are available for inspection in Group Rooms and at planning offices in Trem Clwyd, Ruthin and Nant Hall Road, Prestatyn.

1.2 The Report is submitted to the Planning Committee:

(i) for information;
(ii) for use as a material planning consideration in determining policy and applications;
(iii) to inform members of the potential for regenerating the eight town centers within the County.

2. BACKGROUND

2.1 The two previous retail studies for the northern and southern parts of the County were undertaken separately over 5 years ago by consultants (i) Roger Tym and (ii) Chestertons, respectively. These studies informed both the preparation of the current UDP and development control decisions. Five years is the recommended period to update retail studies and accordingly the new County wide study commenced last year.

3. AIMS OF THE STUDY

3.1 This County wide Study was extended to cover leisure which are related to retail uses and are encouraged to locate in town centres. The Study closely followed advice set out in Planning Policy Wales (2002) and Technical Advice Note 4 (TAN 4) and covered the following:

1. Changing national planning guidance and advice;
2. Changing trends and circumstances in retailing – both generally and locally;
3. Quantitative and qualitative assessment of retail demand and capacity – including any significant developments within the county and beyond;
4. Heath checks of the viability and vitality of each of the 8 centres in the county;
5. Feasibility and suitability of possible development sites and opportunities to meet any quantitative or qualitative retail need;

6. Conclusions and recommendations to update the current retail strategy, planning policies and proposals, in order to:
   (i) to inform review of development plan;
   (ii) assist in the determination of planning applications; and
   (iii) generate more positive town centre management.
7. Identification of strategies and actions for each town centre to improve their future viability and vitality.

4. EXECUTIVE SUMMARY

4.1 The Executive Summary comprises 18 pages and provides a useful summary of the substantial main document of over 85 pages plus 10 Appendices. Rather than summarise the Executive Summary here, I have identified several key messages which are set out below:

5. KEY MESSAGES

5.1 The key messages of the study are:

1. A continued decline and deterioration has been experienced in nearly all of the town centres - in both relative and absolute terms;
2. Competing centres such as Chester, Wrexham and Llandudno have expanded, improved and drawn clear of Denbighshire's centres.
3. Unless positive measures and steps are taken as a matter of urgency, this decline will continue, resulting in further vacancies and missed investment opportunities;
4. Further out-of–town retailing should be resisted as it will further exacerbate the decline of Denbighshire's centres – but this must be matched by development in town centres. This can only be achieved by a more pro-active approach to town centre management and re-development (including site assembly).

6. RECOMMENDATIONS

6.1 That the Study is used as a:

1. material planning consideration to inform both policy formulation and the determination of planning applications, where appropriate;
2. justification to adopt a more positive and pro-active approach to town centre management – including strategic long term (vision, attracting investment, site assembly) as well as short term operational matters (street cleaning, events);
3. basis for a presentation/workshop on the county's town centers, bringing together interested organisations and stakeholders in both the public and private sector;
4. basis for the response of officers and other stakeholders on the issues raised within the report.

Appendix 1
Denbighshire Retail and Leisure Study 2003
Executive Summary

Denbighshire County Council

DENBIGHSHIRE RETAIL & LEISURE STUDY

EXECUTIVE SUMMARY

February 2003

Roger Tym & Partners

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1 AIMS OF THE STUDY

1.1 The study brief sets the following aims:

- to provide a clear basis for an early review of the UDP's Retail Strategy;

- to identify strategies for the eight town centres that can be used to secure funding for urban regeneration;

- to assess quantitative and qualitative retail needs and the suitability of various town centre and edge-of-centre sites in meeting these needs;

- to assess the extent to which the Welsh Development Agency, Objective One or any other grants may assist in bringing forward opportunities; and

- to enable improved consideration of current and emerging proposals for food retail and non-food retail development.

1.2 In responding to the brief, we grouped the tasks to be undertaken under five headings, as follows:

- market research by means of a survey of households in order to establish current patterns of retail and leisure spending, the conditions necessary to secure an increase in the expenditure retention level and to assess quantitative expenditure capacity;

- health checks for the eight centres and an assessment of the main competing centres outside Denbighshire;

- a survey of the town centres to identify retail and leisure development opportunities, requirements for land assembly and so on;

- development of strategies for each of the eight centres, taking account of quantitative and qualitative needs, opportunities and the requirements of national policies; and

- identification of top priorities for action or further research and of the mechanisms which will need to be put in place to ensure complementarity with other Council initiatives and maximise the prospects of drawing down WDA and European funding.

2 THE REQUIREMENTS OF NATIONAL PLANNING POLICY

2.1 The national policy framework has established 12 important principles, as follows:

i) the objective to promote, sustain and enhance the vitality and viability of existing town, district and local centres as part of a package of initiatives to promote sustainable development (Planning Policy Wales, TAN (W) 4 and 'a better quality of life');

ii) the objective '*to secure accessible, efficient, competitive and innovative retail provision for all communities of Wales, in both urban and rural areas'* (paragraph 10.1.1 of Planning Policy Wales);

iii) the objective '*to promote town, district, local and village centres as the most appropriate locations for retailing and for functions complementary to it'* (paragraph 10.1.1 of Planning Policy Wales)

iv) the objective *'to promote access to these centres by public transport, walking and cycling'* (paragraph 10.1.1 of Planning Policy Wales);

v) the need for Unitary Development Plans (UDPs) to establish a hierarchy of centres and a strategy for the location of employment, shopping, leisure, hospital, education and other uses which generate many trips, so as to identify the preferred locations for major retail and leisure investment and ensure that all significant generators of travel are well served by public transport (paragraphs 8.1.3, 10.2.1, 10.2.13 and 11.2.2 of Planning Policy Wales);

vi) the need to adopt a plan-led approach to the promotion of all types of new development which generate many trips, so as to ensure that they are well served by public transport (paragraph 8.6.3 of Planning Policy Wales, and paragraphs 21 and 19 of TAN (W) 18 and the Draft TAN (W) on Transport respectively);

vii) the requirement to adopt a sequential approach to selecting sites for new retail and leisure development and other town centre uses - in areas where there is a need and capacity for such development - which is an approach which requires flexibility on the part of local planning authorities, developers and retailers (paragraphs 10.2.11 to 10.2.12 and 10.3.2 of Planning Policy Wales and paragraph 6 of TAN (W) 4);

viii) the need to assess the principle of 'severability' in applying the sequential approach, so as to investigate whether it is possible or desirable to disaggregate large retail and leisure development proposals into their constituent parts in seeking to fit them into existing town, district and local centres (paragraph 10.3.3 of Planning Policy Wales);

ix) the desire to reduce overall travel and the demand for car travel in particular (paragraph 8.1.3 of Planning Policy Wales, paragraph 5.1.3 of the Transport Framework for Wales, paragraph 5 of the Draft TAN (W) on Transport, and 'a better quality of life');

x) the presumption to resist applications for retail development on land designated for other uses in an approved development plan (paragraph 10.3.16 of Planning Policy Wales);

xi) the desire to promote mixed-use developments, especially within town centres, and maximise the use of previously developed brownfield land (paragraphs 2.5.2 and 10.2.4 of Planning Policy Wales); and

xii) the need to improve access to leisure, retail and other services for residents of deprived areas as part of the drive to promote social inclusion (paragraphs 2.3.2 and 2.5.5 of Planning Policy Wales, 'a better quality of life' – the first of the White Paper's four core objectives and paragraphs 1.8, 7.29 and 7.33).

3 TRENDS IN RETAIL AND LEISURE INVESTMENT

Expenditure

3.1 The growth in volume of retail sales in Great Britain since 1995 has been higher in the non-food comparison retail sector, than in the food sector, with highest growth secured by retailers of household goods. This recent trend reflects the longer term trend since the mid-1970's during which growth in comparison expenditure has averaged 3.6 per cent, per capita, per annum, compared to a growth of convenience (food) expenditure of only 1.8 per cent, per capita, per annum.

Location of Investment and Retail Trading Formats

3.2 Planning policy has substantially reduced the flow of new out-of-centre retail investment in recent years. Over 90 per cent of new shopping centre floorspace in Great Britain was developed in town centres in the year 2001, compared to a corresponding proportion of 68 per cent in 1990. Similarly the flow of out-of-centre retail warehouse park development is now just 40 per cent of its 1990's peak. Nevertheless, proposals to substantially extend major out-of-centre developments such as Broughton Park – which has already attracted many quality retailers to an out-of-centre location – remain a threat to Denbighshire's town centres.

3.3 In recent years, the prospects for department stores have improved. However, most of the leading operators require larger catchment populations than Rhyl. Moreover, department stores often command the ability to demand a subsidy from developers towards fit-out costs, so that large scale development opportunities are required, with the subsidy derived from the unit shopping which is anchored by the department store.

3.4 The 1990s witnessed substantial growth in the development of factory outlet centres (FOCs), which are groups of stores, that offer discounted brand goods which are typically out of season, or end of season, or slightly defective, or which represent excess stock. There are now 44 FOCs in the UK, the largest of which is Cheshire Oaks which has 32,500m² of floorspace. Nevertheless, the flow of FOCs has reduced as a result of the propensity for promoters to seek out-of-centre locations against the tide of national policies.

3.5 In the food sector, the major operators are finding it increasingly difficult to secure permissions for large supermarkets outside town centres. Many operators are seeking to offer an increasing range of non-food items, often associated with applications for store extensions. At the other end of the spectrum, several operators have introduced new small scale convenience formats of around 500m².

3.6 In the leisure sector there is evidence, in some part of the UK, of over supply in the multiplex cinema sector, with several closures of first generation schemes occurring since the year 2000. The new growth market in the leisure sector is likely to be 'gaming sheds', given the legislative reforms to gaming which will occur in the near future.

3.7 The e-tail market has grown, but the 'must try it on/feel it' factor means that most sectors remain competitive in the High Street, particularly the clothes and footwear sector.

4 CURRENT PATTERNS OF RETAIL SPENDING AND LEISURE VISITS

Comparison Expenditure

4.1 Only 41 per cent of the non-food comparison expenditure of the residents of Denbighshire's primary catchment area (PCA) is spent in stores and town centres which are located within the PCA. We consider that there is both scope and a need to increase the overall retention rate if Denbighshire's town centres are to improve. The retention rate varies from just 8 per cent for residents of the Llangollen area to 52 per cent for residents of Rhyl. Two thirds of the outflow of comparison expenditure, or leakage, is accounted for by Chester, Llandudno and Wrexham. There are also significant outflows to Cheshire Oaks, Broughton Park and to Manchester City Centre.

4.2 Rhyl is by far the most important town centre for comparison shopping within Denbighshire, with a comparison turnover drawn from residents of the PCA of £69m. However, Rhyl attracts only 27 per cent of the overall pot of expenditure available to the residents of Denbighshire's PCA. Prestatyn is the next largest centre, with a comparison turnover of around £8m, followed by Denbigh and Ruthin both of which have comparison turnovers of almost £6m. Rhuddlan, St Asaph, and Corwen have an extremely limited comparison goods offer and Llangollen's comparison retailing is very much aimed at the tourism market.

Convenience Expenditure

4.3 Convenience shopping is more of a locally oriented activity than comparison shopping, with most food and groceries shoppers preferring to use facilities as close to home as possible (or close to work) unless there are serious qualitative or quantitative deficiencies in local provision. Accordingly, the performance of the PCA in relation to the retention of convenience expenditure is significantly better than that for comparison spending. The survey indicates that retail facilities located within the PCA zones attract 84 per cent of convenience expenditure generated by residents of the area.

4.4 Whilst the overall retention level indicates that there is no generalised quantitative or qualitative deficiency in convenience retail provision, the local retention rates are low in Corwen (20 per cent), Abergele (29 per cent), the St Asaph/Rhuddlan area (31 per cent) and Llangollen (37 per cent). These low localised convenience retention rates suggest scope for further convenience provision of appropriate scale in these areas and the need in Abergele is in the process of being met by the Tesco proposal which should be supported. The local convenience retention rates are highest in Rhyl (90 per cent), Denbigh (77 per cent), Ruthin (59 per cent), and Holywell (51 per cent). In Prestatyn the local retention rate is 48 per cent, but this will be improved when the Tesco planning commitment is implemented.

4.5 There are six stores located outside Denbighshire's PCA which attract more than £1m of convenience expenditure from its residents; these are:

- Tesco, Mold £4.68m
- Asda, Wrexham £2.41m
- Tesco, Wrexham £2.35m
- Asda, Queensferry £2.35m
- J Sainsbury, Wrexham £2.22m
- Tesco, Broughton Park £1.32m

4.6 Most of the convenience leakage to the three Wrexham food superstores is from the Corwen and Llangollen areas. Most of the leakage to the Tesco at Mold is from Ruthin and Holywell. Most of the leakage to the Asda at Queensferry and the Tesco at Broughton is from the Holywell area.

Leisure Visits

4.7 Rhyl is the most important location within Denbighshire for visits to commercial leisure facilities such as cinemas, bingo halls and bowling, but Wrexham and Chester attract residents from the southern part of the County and from the Holywell area. As expected, the pattern of visits to pubs, bars and restaurants is much more localised, but many of Denbighshire's residents are prepared to travel significant distances to Llandudno, Mold and Manchester for visits to theatres/concert halls.

Conclusions

4.8 The analysis of current shopping patterns has shown that:

i) Rhyl is by far the most important of the comparison centres within Denbighshire, with an overall market share for residents of the Denbighshire PCA of 27 per cent;

ii) the retention of comparison expenditure by stores and centres within the PCA amounts only to 41 per cent of aggregate expenditure, with leakage accounting for 59 per cent of expenditure – there is clear scope and a need to increase the comparison retention rate;

iii) Chester is by far the most important comparison competitor, followed by Llandudno and Wrexham;

iv) the overall convenience retention rate is very healthy at 84 per cent, but the retention rates in Corwen, Llangollen, the St Asaph/Rhuddlan area and Abergele are unacceptably low and indicate a qualitative need for enhanced provision; and

v) there is significant leakage of convenience expenditure from the Corwen and Llangollen areas to the three food superstores in Wrexham (Asda, Tesco, and J Sainsbury), there is significant leakage to the Asda at Queensferry and the Tesco at Broughton Park from the Holywell area and significant leakage to the Tesco store at Mold from Ruthin and Holywell.

4.9 The comparison business retention level will increase if further retail development occurs within the town centres of the PCA which is of a sufficient quality to resist the pulling power of the new developments which are occurring elsewhere in the region outside Denbighshire's PCA. The proposed retail element of the extension to Broughton Park in Flintshire should be resisted firmly by Denbighshire County Council.

5 QUANTITATIVE RETAIL CAPACITY ANALYSIS

Comparison Sector

5.1 If Denbighshire's town centres can be improved so as to increase the retention of the comparison expenditure available to residents of the PCA, from 41 per cent at present, to 47 percent by the year 2001, then we project a growth in retained expenditure amounting to around £64m. Some of this growth will need to be set aside for the needs of existing retailers, to allow for a growth in internet-based retailing, to allow for a reduction in vacancies, and to meet the turnover requirements of existing committed developments. However, even allowing for these 'claims' on the expenditure growth, there is projected to be around £28m available for new comparison retailing – over and above existing commitments such as Greenfield Place – assuming the retention level can be improved.

5.2 Under such a scenario, there would be quantitative need for around 7,500m² (81,000 ft²) of nett additional comparison sales area. However, this requirement shall not be regarded as a prescriptive floorspace limit, since further quality developments within Denbighshire's town centres could improve the retention level to a higher than that assumed. Quality developments in the right locations can create their own capacity by clawing back expenditure leakage.

Convenience Sector

5.3 If the retention of convenience (food) expenditure can be improved from its current level of 84 per cent to 86 per cent in the year 2011, then we forecast a growth in retained expenditure up to 2011 of around £39m. However, much of this growth will be absorbed by the Tesco commitment in Prestatyn, and small allowances need to be made also for the growth in internet-based shopping and the growth needs of existing retailers. As a consequence, we calculate a short term expenditure deficit in the period up to 2006 which means that the Tesco store in Prestatyn will have some competitive effects on other retailers in the short term. However, by the year 2011, there is a small positive convenience expenditure residual.

5.4 There is no overall quantitative need for further convenience provision in Denbighshire, over and above the Tesco commitment in Prestatyn. However, there are clear localised needs for further convenience provision of appropriate scale in Abergele and in the town centres of Corwen, Llangollen and the St Asaph/Rhuddlan area in order to improve the local retention rates in these towns.

6 TAN 4 HEALTH CHECKS

Rhyl

6.1 We consider that Rhyl is healthy in terms of its convenience sector provision, but that its comparison offer is not competitive in relation to competing centres outside Denbighshire, particularly in the fashion and higher order goods sectors. Rhyl is represented by few national multiple operators (relative to its main competitors) and whilst there is some evidence of national multiple operator demand, this demand is limited and mainly from the lower end of the retail spectrum.

6.2 Rhyl's position in the various retail ranking indices is slipping, which is an indicator of its poor health. Whilst Rhyl has good service sector representation generally, its food & drink outlets serve a restricted market, thereby narrowing the centre's appeal to families. Other indicators of Rhyl's poor health as a retail and leisure centre include: its deteriorating (increasing) level of retail yield; low retail rents (compared to competitor centres); a rising vacancy level; continuing problems in relation to parking and congestion; and the continuing crime problem (perceived and actual).

Prestatyn

6.3 We consider that Prestatyn is relatively healthy in terms of its convenience sector provision and that implementation of the Tesco commitment will strengthen its position. Prestatyn has quite good representation across the comparison sub-sectors, but fashion clothing provision remains particularly weak and we have not identified any fashion retailers that are looking to move into Prestatyn; this poor range of clothing provision is a prime reason for Prestatyn's recent dramatic slide down the MHE retail ranking index. There is, however, interest from at least two key national multiple retailers (Tesco and Argos) which could significantly reverse the fortunes of Prestatyn. Poor accessibility to the A55 is a key problem which needs to be addressed.

Rhuddlan

6.4 Rhuddlan's health as a retail centre is poor, both in terms of its convenience and its comparison offer (except for antiques shops, which have emerged recently as a niche market in Rhuddlan). This is reflected by Rhuddlan's very high vacancy rate. Rhuddlan is healthier as a service centre (hairdressers and beauty salons) and its environmental condition is good. In terms of leisure and tourism, Rhuddlan has a healthy mix of attractions, but these are not fully exploited.

St Asaph

6.5 St Asaph functions as a local convenience and service centre, but it has no material comparison offer. The convenience offer is limited, but the range of services and the quality of its restaurant offer are good. However, St Asaph has particular shortcomings in terms of HGV traffic, on-street parking, congestion and associated pedestrian-traffic conflict. If these problems are not addressed through implementation of a by-pass, there is a danger of existing businesses being lured elsewhere.

Denbigh

6.6 Denbigh's convenience offer has deteriorated recently, with the loss of butchers and bakers, largely attributable to increased competition from edge-of-centre supermarkets. Denbigh's health in terms of its comparison offer is similarly deteriorating (although there is a good mix of specialist retailers), and whilst Denbigh contains a high proportion of service uses, its food & drink offer appeals to a very narrow market. Moreover, Denbigh's level of vacancy is very high and there are parking problems, particularly for businesses. All of these factors help to explain Denbigh's significant recent slide down the retail ranking indices.

Ruthin

6.7 We consider that Ruthin has a healthy convenience offer and is gaining a reputation as a centre for health and beauty services. Ruthin has a good range of quality hotels and restaurants, and tourist attractions; it has no significant traffic problems; and its environment and general setting is of a very high standard. The only area of its health which we consider has deteriorated in recent years is its role as a centre for comparison goods, with a contraction in both the overall number of comparison goods outlets, and, more worryingly, some contraction in its niche market (ladies' fashions).

Corwen

6.8 Corwen is reasonably healthy as a centre for local convenience shopping, but it does not provide for main food shopping. It is weak as a centre for comparison goods and service uses and a key indicator of Corwen's poor health in these sectors is the high vacancy level.

Llangollen

6.9 Llangollen provides for day-to-day convenience needs, but its supermarket offer is restricted. Llangollen's role as a centre that mainly serves the tourist market has been consolidated in recent years; this tourist role is complemented by the relatively good range of restaurant uses.

Conclusions

6.10 The status of Denbighshire's main retail centres in the retail hierarchy is diminishing, compared with competing centres (Chester, Wrexham and Llandudno), which are generally improving. This suggests that competing centres have more successfully managed to mitigate the undermining impacts of major out-of-town developments such as Cheshire Oaks and Broughton Park. The findings of the retail rankings analysis were corroborated by a wide range of consultees, who generally endorsed the view that Chester remains the dominant regional centre, followed by Wrexham as the major sub-regional centre; Llandudno is now generally regarded as a far superior retail centre to Rhyl and performs a sub-regional status, with Rhyl still elusively struggling for sub-regional status. Prestatyn is clearly the second centre in Denbighshire. Denbigh performs more as a district centre role, with Ruthin and Llangollen of a similar order, but serving a wider tourist market. Corwen, Rhuddlan and St Asaph essentially function as local centres

6.11 Out-of-centre development, such as, that proposed by Development Securities and Pillar Property for a 505,000 ft^2 (47,000 m^2) extension to Broughton Shopping Park on the Welsh border near Chester, represents a further threat to Denbighshire's town centres. A planning application has been lodged with Flintshire County Council to build 347,000 ft^2. (32,300 m^2) of offices and 127,000 ft^2 (11,755 m^2) of retail space. According to Development Securities, Tesco, Allders, Woolworths, WHSmith, Boots and Next are already represented at the Park, but more retailers are said to require space. We consider that Denbighshire County Council should object strongly to the threat to its town centres posed by the proposed expansion of Broughton Park.

7 STRENGTHS AND WEAKNESSES OF DENBIGHSHIRE'S TOWN CENTRES

Rhyl

7.1 Rhyl's principal weaknesses are: its limited comparison goods offer, particularly in the mid-order clothing sector; the lack of recent town centre investment and only limited occupier demand to reverse this trend; a lack of supporting facilities such as quality, family oriented eateries; its very poor quality public realm in many respects, including the cluttered streetscape and street furniture, the poorly maintained property and the run-down appearance of the Promenade area; its congestion and pedestrian-traffic conflict problems; the continuing perception of Rhyl as a crime hotspot; and the town centre's close proximity to Wales's most deprived ward and all the attendant problems that brings (crime / anti-social behaviour, and so on).

7.2 Key strengths include the untapped expenditure potential of recent in-migrants who currently favour Chester and Llandudno as their main comparison spend locations, and the scope to enhance levels of tourism expenditure. Rhyl also has a healthy convenience sector.

Prestatyn

7.3 Prestatyn – like Rhyl – has more clearly identifiable weaknesses than strengths. Prestatyn's main plus points are its relatively healthy convenience sector which will be bolstered further by the implementation of the Tesco proposal, its relatively low vacancy level and the quite pleasant southern end of High Street, which contains some nice boutiques. Its main weaknesses are: the very small number of national multiple retailers (attractors) present in the town and the low level of identified retailer demand to overcome the problem; a very low-grade environment at the northern end of High Street which will not be improved until the Tesco commitment is implemented; the town centre's relative inaccessibility; the lack of supporting infrastructure including high quality restaurants; and the very limited amount of high quality tourist accommodation.

Rhuddlan

7.4 Rhuddlan's main strengths are: its good range of tourist attractions (castle / river / church), located in an attractive setting; its reputation as a centre for antiques; and its existing reputation as a service centre. Rhuddlan's main weaknesses are: its limited variety of shops (convenience and comparison); the lack of a bank and a coach park; and the continuing failure to fully tap the tourism potential of the Castle.

St Asaph

7.5 St Asaph's principal strengths are its good range service uses (restaurants and professional uses) and its buoyant housing market. Its main weaknesses are the hostile town centre environment (its topography and the problems associated with high volumes of HGV traffic, narrow footways and so on), and its very limited retail offer (both in the comparison and convenience sectors).

Denbigh

7.6 Denbigh's main strengths are its eclectic range of high quality architecture and well-respected ceramics and gift shops. Its main weaknesses are: the insufficient amount of parking for businesses; the very limited comparison shopping offer; the poor linkages to the castle; the very high vacancy level; and its poor quality supporting infrastructure (hotels and restaurants).

Ruthin

7.7 Ruthin's main strengths are: its reputation as a centre for high-quality ladies' fashions and its emerging reputation as a centre of hair & beauty services; the range of good restaurants, hotels and tourist attractions; and its attractive setting. Ruthin's main weaknesses are the lack of a strong concentration of Class A1 retail units, the pockets of vacancies in the town centre and the retraction of its niche market in ladies' fashions.

Corwen

7.8 Corwen's main strengths are: its good range of local shops and services; its status as a base for outdoor pursuits; and its location in relation to the strategic road network. Corwen's main weaknesses are: the lack of investment in the Pavilion; the lack of a supermarket, with no apparent operator demand to support one; and its very weak housing market.

Llangollen

7.9 Llangollen's main strengths are: its local history; its niche market for antiques; and its recently acquired Tourism Growth Area (TGA) status. Llangollen's main weaknesses are: the very limited range of both comparison and convenience shops; insufficient parking and resultant congestion; and the lack of any sizeable or unconstrained development sites.

8 THE CENTRE STRATEGIES

Introduction

8.1 Our recommended strategies for each of the centres contain projects and policy actions under four headings – Strategic Themes, Attractions (diversity and critical mass), Accessibility (mobility and linkages) and Amenities (security and identity). The new *attractions* are needed to meet actual and potential demand, whilst the recommended *accessibility* and *amenity* measures are those that are necessary to secure the new attractions, and to improve the town centres for existing users, which should be a policy aim, even where there is little or no scope for securing new attractions.

Rhyl

8.2 The strategy for Rhyl includes the following projects, aspirations, or policy action areas:

- to tackle the problems of West Rhyl ward as the most economically and socially deprived ward in Wales and a source of many problems for the image of the town centre;
- to develop a retail occupier 'wish list' to assist in target marketing initiatives;
- the promotion of town centre office employment;
- improvements to West Kinmel Street car park, an enhanced park and ride scheme and better enforcement of parking restrictions;
- to re-launch a site assembly initiative in respect of the High Street/Sussex Street/Queen Street/West Parade block – a process which may ultimately require CPO procedures – and to identify high quality private sector development partners which have the wide ranging expertise to take on difficult projects and help to create new markets;
- to sort out the problems of the West Promenade and come to a conclusion on the feasibility and best mix for leisure projects at Foryd Harbour and Ocean Beach;
- to identify private sector partners to provide new hotel accommodation of a higher standard than currently offered in Rhyl;
- target marketing of quality family orientated restaurant operators; and
- environmental enhancement through provision of green spaces and improvement of street furniture and shop fronts.

Prestatyn

8.3 The strategy for Prestatyn includes the following projects, aspirations, or policy action areas:

- to implement the High Street supermarket commitment as a matter of urgency and resolve any clashes of private sector interests which are preventing progress;
- to redesignate the land to the rear of Kwik Save for comparison retail development;
- to develop a retail occupier 'wish list' and undertake an intensive target marketing initiative to assess the conditions which would need to prevail to attract these retailers to Prestatyn and to identify specific property requirements;

- encouragement for a redevelopment of the Scala Cinema;
- enforcement of parking restrictions, traffic calming measures and provision of a shuttle bus service; and
- environmental enhancement of key streets and gateways.

Rhuddlan

8.4 The strategy for Rhuddlan includes the following projects, aspirations, or policy action areas:

- to promote business park development on the Triangle site so as to bring employment and economic activity to the town;
- to target banks and identify the conditions under which a bank can be persuaded (perhaps with grant assistance) to locate in the High Street;
- to upgrade the condition and appearance of the vacant properties on High Street;
- provision of a youth centre; and
- the promotion of Rhuddlan Castle and development of a heritage centre and coach park near to the Castle.

St Asaph

8.5 The strategy for St Asaph includes the following projects, aspirations or policy action areas:

- to undertake a feasibility study to identify and agree a route for a by-pass and funding sources;
- to encourage the WDA and other relevant agencies to make available grants for environmental improvements and building maintenance, provided that a commitment is given to proceed with the feasibility study and an in-principle commitment is made to proceed with the by-pass;
- to assess the feasibility of providing a new car park and a shuttle bus service to ferry people up and down the steep High Street;
- more efficient enforcement of parking restrictions; and
- to consider the imposition of a weight restriction to remove HGV traffic from High Street.

Denbigh

8.6 The strategy for Denbigh includes the following projects, aspirations, or policy action areas:

- to reverse the decline in the number and quality of independent comparison traders present in the town through the identification of niche opportunities and intensive marketing of the town to potential independent operators/regional multiples;
- to build a car park designated for the use of businesses located in the town centre;
- to encourage family friendly eating establishments which remain open after 5.00pm;

- improved linkages between the town centre and the castle;
- improvements to the public realm; and
- encouragement of improved building maintenance.

Ruthin

8.7 The strategy for Ruthin includes the following projects, aspirations, or policy action areas:

- to introduce an even tougher policy stance to ensure that the vacant units are eventually occupied for Class A1 retail uses only;
- to promote the redevelopment for retail use of land next to the Town Hall and Crown House; and
- investigation of the potential tourism uses for Nant Clwyd House.

Corwen

8.8 The strategy for Corwen includes the following projects, aspirations, or policy action areas:

- to forge linkages with potential private sector investors (existing or new) to ensure that mixed use development of the Common and adjacent areas is expedited, including provision for a new supermarket;
- to refurbish the Pavilion;
- provision of subsidised bus services from existing housing estates to the town centre;
- improvements to the A5/A494 junction, restriction of HGV access to Green Lane and traffic calming on the A5; and
- continued monitoring of the feasibility of the proposed extension of the steam railway.

Llangollen

8.9 The strategy for Llangollen includes the following projects, aspirations, or policy action areas:

- to secure a larger supermarket than presently exists, perhaps on the site of the Lower Dee Mill if this site was ever to be vacated;
- find a site for a new car park;
- to improve the physical links between the Royal International Pavilion and the town centre;
- to assess the feasibility of a 'park and float' scheme;
- the introduction of CCTV; and
- improvement to shop facias.

9 OVERALL CONCLUSIONS AND RECOMMENDATIONS

Conclusions

9.1 Our study has demonstrated that Denbighshire's larger retail centres have lost ground in the wider regional retail hierarchy since the mid 1990s, with the diminished vitality and viability particularly noticeable in Rhyl, Prestatyn and Denbigh. The decline in these centres reflects, in part, the greater progress made in the competing centres of Chester, Wrexham and Llandudno and the competition posed by large out-of-centre developments such as Broughton Park and Cheshire Oaks. There are, however, localised factors which have also frustrated progress in the larger centres including the acute level of deprivation experienced in West Rhyl, the need for more focussed partnership between the public sector and business groups, difficulties caused by uncooperative property owners, low levels of entrepreneurial expertise and a dearth of quality development partners.

9.2 Similarly, the smaller centres of St Asaph, Rhuddlan and Corwen have not been able to stem the decline in the role they play in the economic and social life of the communities they serve. Only Ruthin and Llangollen can be described as being relatively healthy centres and the latter survives because of its specialist tourism role.

9.3 It is clear, therefore, that the time has come for the public sector to take the lead in stimulating public-private partnership initiatives, so as to take action which can improve investment confidence, reduce investment risk and, ultimately, boost vitality and viability. The partnership initiatives will need to succeed, not only in improving accessibility and the quality of the public realm, but also in attracting the new high quality retail and leisure occupiers, which are required to increase expenditure retention and arrest decline. The first task, however, is to find the quality of development partner – with wide ranging expertise across the UK – which has been so obviously not present in Denbighshire for many years.

9.4 In Section 8, we identify our recommended strategies for each of the County's eight main centres, with actions clustered under the headings of "Strategic Themes", "Attractions", Accessibility" and "Amenities". Some of the actions involve further research, target marketing and feasibility assessments, but there are also a range of early win projects which should be capable of implementation in the short term. In this section we identify some of the prerequisites to successful implementation of the overall strategies and the top priority projects which require the Council's immediate attention, even if they are not capable of implementation until the medium to long term.

Planning Policy Context

9.5 The Unitary Development Plan (UDP) has only recently been adopted, but one of the aims of the study was to provide a basis for an early review of the UDP's retail strategy. Our need assessment has shown that there is a requirement for further comparison sector development of the right quality in the right locations, so as to increase the unacceptably low comparison expenditure retention rate which exists today. Our research suggests that it would be inappropriate for any review of the UDP to set rigid targets for new floorspace, since developments of the right type and quality in the right town centre locations can create their own capacity by reducing leakage and increasing the retention level. Nevertheless, the minimum nett gain in sales floorspace to improve retention to an acceptable level in the period up to 2011, is around 7,500m². The market will dictate that most new comparison development is directed to Rhyl, but there is clearly scope for further comparison sector development in Prestatyn and to a lesser extent in Denbigh and Ruthin.

9.6 However, the town centre comparison development that is so urgently required will not materialise unless the right development opportunities are assembled (through CPO procedures if necessary), and unless progress is made simultaneously in improving accessibility, improving the quality of the public realm, reducing crime and so on. Moreover, the review of the UDP will need to take a tough stance against out-of-centre retail proposals, both within Denbighshire and in neighbouring authorities.

9.7 So far as the convenience sector is concerned, there is no generic shortage of provision, but our research has shown localised needs for improved provision of supermarkets of appropriate scale in Llangollen and Corwen and in the Rhuddlan/St Asaph area. The review of the UDP will need to identify sites of appropriate size to meet these local needs; and the principle of a new supermarket at the High Street site in Prestatyn should be renewed in the UDP review.

9.8 Sequentially preferable opportunities which are suitable, viable and likely to become available for comparison led development include:

Town Centre Sites

i) The High Street/Sussex Street/Queen Street/West Parade block in Rhyl - this block was identified in our earlier 1995 study and in the adopted UDP, but little progress has been made. The WDA has acquired some properties on Queen Street, but a CPO process may be required to assemble the main site.

ii) The area around the old indoor market south of Sussex Street in Rhyl, which appears to be ready for re-development .

Edge-of-centre Sites

i) Morfa Hall, off Bath Street in Rhyl – this site has potential for retail use, but we consider that redevelopment for office purposes may be more beneficial given the site's peripheral location and the need to diversify the economy of the town centre.

ii) Land to the rear of Kwik Save in Prestatyn – the land to the rear of Kwik Save is currently allocated for employment purposes in the UDP, but we advocate that the allocation be changed to allow for non-food comparison development.

iii) Land between West Kinmel Street and the main railway line in Rhyl – this site is just about capable of being made to function as an edge-of-centre site and we consider that it is suitable for retail sheds for bulky comparison retailers.

iv) Land next to the Town Hall and Crown House in Ruthin – this represents a retail redevelopment opportunity which would link well with the nearby PFI project to provide new offices for the Council and it would provide a link between the Coop and the town centre.

9.9 Sequentially preferable town centre sites which are suitable, viable and likely to become available for food retail development include:

i) The High Street site in Prestatyn, for which Tesco has an extant consent.

ii) Some of the vacant properties in Rhuddlan High Street.

iii) Some of the vacant properties in St Asaph High Street.

iv) Some of the vacant premises in Denbigh.

v) Some of the vacant units in Ruthin.

vi) Corwen Common and some of the vacant units in Corwen.

9.10 Sequentially preferable sites which are suitable, viable and likely to become available for commercial leisure, hotel and restaurant uses include:

i) The Events Arena in Rhyl.

ii) The East and West Promenades in Rhyl, including Marine Lake and Foryd Harbour and Ocean Beach.

iii) The Scala Cinema site in Prestatyn.

iv) Nant Clwyd House in Ruthin.

v) Corwen Common.

vi) Some of the vacant units in all of the eight town centres.

9.11 Clearly further work will need to be undertaken in identifying and assembling sequentially preferable sites through the UDP review process.

Key Recommendations

9.12 Our recommendations for top priority action on the part of the County Council, the WDA and their associated private and public sector partners, for each of the eight centres, are as set out below, with details of the likely actors and potential funding sources given in the previous Section 8.

Rhyl

9.13 The top priorities for Rhyl are:

i) to tackle the problems of West Rhyl ward as the most economically and socially deprived ward in Wales and a source of many problems for the image of the town centre;

ii) to develop a retail occupier “wish list” and undertake an intensive target marketing initiative to assess the conditions which would need to prevail to attract these retailers to Rhyl and to identify specific property requirements;

iii) to re-launch a site assembly initiative in respect of the High Street/Sussex Street/Queen Street/West Parade block – a process which may ultimately require CPO procedures – and to identify high quality private sector development partners which have the wide ranging expertise to take on difficult projects and help to create new markets;

iv) to sort out the problems of the West Promenade and come to a conclusion on the feasibility and best mix for leisure projects at Foryd Harbour and Ocean Beach; and

v) to identify private sector partners to provide new hotel accommodation of a higher standard to that currently offered in Rhyl.

Prestatyn

9.14 The top priorities for Prestatyn are:

i) to implement the High Street supermarket commitment as a matter of urgency and resolve any clashes of private sector interests which are preventing progress;

ii) to redesignate the land to the rear of Kwik Save for comparison retail development; and

iii) to develop a retail occupier "wish lst" and undertake an intensive target marketing initiative to assess the conditions which would need to prevail to attract these retailers to Prestatyn and to identify specific property requirements.

Rhuddlan

9.15 The top priorities for Rhuddlan are:

i) to promote business park development on the Triangle site so as to bring employment and economic activity to the town;

ii) to target banks and identify the conditions under which a bank can be persuaded (perhaps with grant assistance) to locate in the High Street; and

iii) to upgrade the condition and appearance of the vacant properties on High Street.

St Asaph

9.16 The top priorities for St Asaph are:

i) to undertake a feasibility study to identify and agree a route for a by-pass and funding sources; and

ii) to encourage the WDA and other relevant agencies to make available grants for environmental improvements and building maintenance, provided that a commitment is given to proceed with the feasibility study and an in-principle commitment is made to proceed with the by-pass.

Denbigh

9.17 The top priorities for Denbigh are:

i) to reverse the decline in the number and quality of independent comparison traders present in the town through the identification of niche opportunities and intensive marketing of the town to potential independent operators/regional multiples; and

ii) to build a car park designated for the use of businesses located in the town centre.

Ruthin

9.18 The top priorities for Ruthin are:

i) to introduce an even tougher policy stance to ensure that the vacant units are eventually occupied for Class A1 retail uses only;

ii) to promote the redevelopment for retail use of land next to the Town Hall and Crown House; and

iii) secure a tourism role for Nant Clwyd House.

Corwen

9.19 The top priorities for Corwen are:

i) to forge linkages with potential private sector investors (existing or new) to ensure that mixed use development of the Common and adjacent areas is expedited, including provision for a new supermarket; and

ii) to refurbish the Pavilion.

Llangollen

9.20 The top priorities for Llangollen are:

i) to secure a larger supermarket than presently exists, perhaps on the site of the Lower Dee Mill if this site was ever to be vacated; and

ii) find a site for a new car park.

The Fundamental Requirements

9.21 Several of the top priority recommendations have been known about for several years, with little or no progress. The fundamental requirement for future success is to obtain political consensus in different parts of the County and across political parties and announce a firm intention on the part of all the relevant agencies to come together in order to tackle market failure and negative perceptions. In turn, a resolution of market failure will require very careful target marketing of opportunities, filling knowledge gaps on the part of potential retail and leisure occupiers, financial assistance for pump priming investment and so as to reduce investment risk for early investors, publicity as to how accessibility and the public realm are to be improved, and preparation of marketing material which sets out the vision for each of the centres. Market failure is most apparent in Rhyl and the problems of West Rhyl will require a multi-agency, multi-departmental approach and radical measures to reduce social exclusion, encourage a better socio-economic profile and reduce the density and concentration of deprivation through selective property clearance, changed housing policies and concerted support from the police and social services. In addition it is clear that Denbighshire has suffered from the lack of high quality development partners with UK wide expertise which have the ability to take on difficult projects in low demand areas and to create new markets.

CONTENTS

A REPORT BY THE HEAD OF PLANNING SERVICES

DATE OF SITE VISITS

1. PURPOSE OF REPORT

1.1 To advise Members of the likely date of any Site Visits requested by the Planning Committee.

2. DATE OF THE SITE VISITS

2.1 In consultation with Legal and Administration, it has been decided that the **Tuesday 1st April 2003** is most suitable. This date has been provisionally booked.

2.2 You are advised, therefore that any site visits arranged today will take place **On Tuesday 1st April 2003**

3. MEMBERSHIP OF THE SITE VISIT PANEL

3.1 This will depend on Political Balance and will include the Chair and Vice Chair of the Committee and the relevant Local Member(s)

4. RECOMMENDATION

4.1 That Members agree to the Site Visits being held on Tuesday 1st April 2003.

Decisions Made by the Head of Planning Services under Delegate Powers
1st - 28th February 2003

Item For Information

This is a list of applications where the decision has already been made under delegated powers. If you wish to discuss the application/decision please contact the Case Officer.

DECISION TYPES

GRANT	**- grant planning permission**
REFUSE	**- refuse all types of application**
APPROVE	**- approve reserved matters or condition**
CONSENT	**- grant listed building, conservation area, or advert consent**
DEEMED	**- does not require advert consent**
NO OBJ	**- no objection to works to tree(s) in conservation area**
NOT REQ	**- proposal does not require permission/consent**
DETERMIN	**- determine that prior approval is not required or is granted on determination application (certain telecom or agricultural works)**
P DEV	**- proposal found to be permitted development after receipt**
WDN	**- application withdrawn by applicant**
INVALID	**- application found to be invalid**
CERTIFY	**- Certificate of lawful use issued**
RCERTIFY	**- refuse to issue certificate of lawful use**