

LLANDUDNO
REGENERATION
PLAN:
SUPPLEMENTARY
TECHNICAL
REPORT



August 2022
Final version

LLANDUDNO SUPPLEMENTARY TECHNICAL REPORT

1. Introduction	2
1.1 Regeneration Plan.....	2
1.2 Evidence Base	2
2. Baseline Analysis	3
2.1 Overview	3
2.2 People and Communities	3
2.3 Business and Investment	7
2.4 Access and Movement	10
2.5 Living in Llandudno	13
3. Policy Review	14
3.1 Overview	14
3.2 Conwy Culture Strategy	14
3.3 Llandudno Tourism Study	15
3.4 Conwy Local Development Plan	16
3.5 North Wales Skills & Employment Plan.....	16
3.6 Conwy Economic Growth Strategy.....	17
3.7 Policy Alignment.....	19
3.8. Net Zero Review.....	24
4. Economic Impact Modelling	27
5. Stakeholder Engagement	29
5.1 Overview	29
5.2 Feedback Summary	29
6. Emerging Project Ideas	35
6.1 Overview	35
6.2 Education Provision.....	35
6.3 New Town Centre Venue: High Quality Market Hall	35
6.4 Happy Valley: Restaurant.....	35
6.5 Happy Valley: Pedestrian Prioritised Colonnade.....	35
6.6 Great Orme Visitor Centre: Glazed Panoramic Building.....	36
6.7 Bodafon Fields	36
6.8 Park and Ride	36
6.9 West Shore Water Activities Infrastructure.....	36
6.10 Gloddaeth Street Car Parking	36
6.11 Live Messaging	37
7. Appendix A: Stakeholder Engagement	38

1. Introduction

1.1 Regeneration Plan

Mace has worked with Conwy County Borough Council (CCBC) to deliver a 10 Year Regeneration Plan (Regeneration Plan) for Llandudno.

Llandudno is a popular place to live and a successful visitor destination already. The key objective of the **Regeneration Plan** is to ensure Llandudno remains successful whilst also future proofing the town to ensure it remains resilient and adaptable to future change and opportunity.

The Regeneration Plan comprises **three core documents** which should be read in parallel. The three documents are described below:

1. The **Visioning Document** identifies a set of five regeneration principles and associated vision statements co-created with local stakeholders to articulate their shared future vision for Llandudno.
2. This **Development Framework and Delivery Plan** (Delivery Plan) includes a set of proposed interventions to steer regeneration and investment activity and an action plan for delivery over 10 years.
3. The **Supplementary Technical Report** includes detailed findings and analysis from our activities to build the evidence base which underpins both the Visioning Document and Delivery Plan.

This document is the Supplementary Technical Report.

1.2 Evidence Base

The **evidence base** presented in this Supplementary Technical Report includes:

- **Baseline analysis** of socio-economic data, relating to key themes of people and communities, business and investment, access and movement, and living in Llandudno (see Section 2).
- Detailed **policy review** of key local and regional policies and strategies, covering tourism, housing, employment and skills and transition to net zero (see Section 3).
- Detailed **economic impact modelling** of future tourism and revisiting the Tourism Analytical Review (2019) developed by consultants (AECOM) as the basis for creating a tourism impact economic model (see Section 4).
- Comprehensive **stakeholder engagement** through interviews held with 67 stakeholders as a broad representation of local businesses, local representative organisations, CCBC colleagues, Town Council colleagues, Tourism and sector bodies and local landowners. This included a community engagement event (see Section 5).
- Summary of **emerging project ideas** garnered from stakeholder interviews and Mace's own research (see Section 6).

2. Baseline Analysis

2.1 Overview

This section presents the findings from our analysis of key data sets to create a baseline understanding of the socioeconomics of Llandudno, in the context of the wider Borough and Wales.

2.2 People and Communities

2.2.1 Population

The table below indicates that the population of Conwy County has been gradually increasing between 2016 and 2020. It is forecast to rise to 123,749 in 2043.

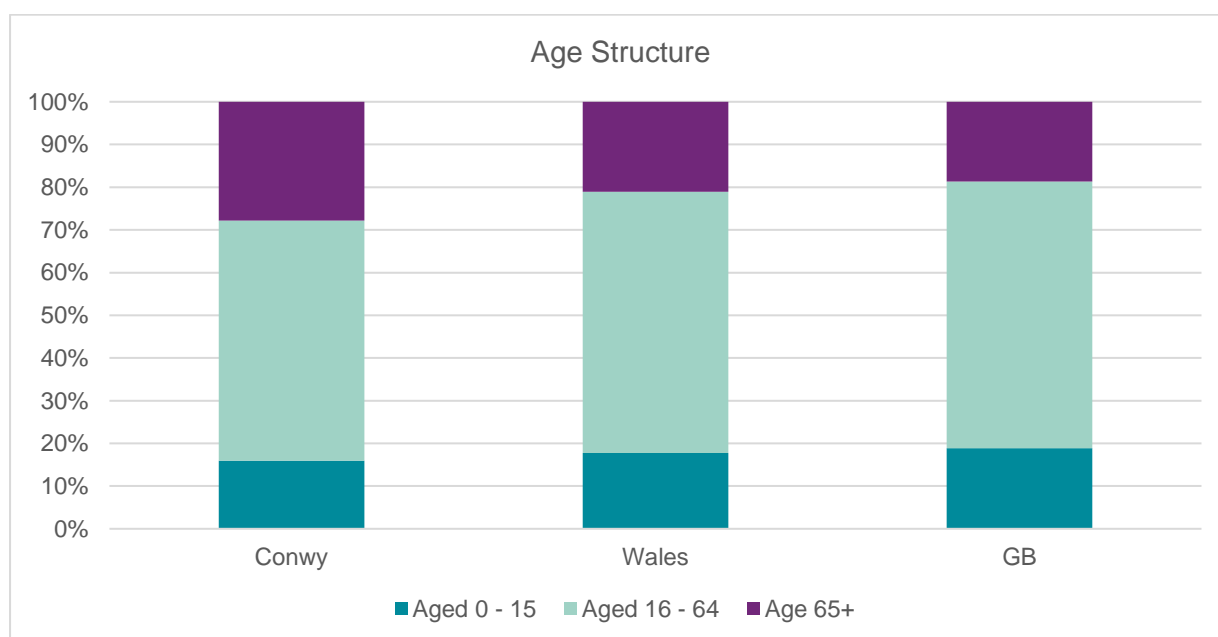
Table 1: Conwy Population

2015	116,500
2016	116,800
2017	116,900
2018	117,200
2019	117,200
2020	118,200

2.2.2 Age

The table below shows the age structure of the populations of Conwy, Wales, and Great Britain. In Conwy, the proportion of people aged 65+ is greater than both the Wales and Great Britain average.

Table 2: Conwy Age Profile.



The Conwy Economic Growth Strategy (2017 – 2027) provides the following relevant data relating to the population of Conwy:

The county has the highest proportion of elderly population in Wales, especially for people aged 85 and over, 4% in Conwy compared to 2.6% in Wales.

The percentage of older people living in Conwy will increase, meaning access issues will have a greater emphasis. It is predicted by 2039 the number of people aged 65 and over will increase in Conwy CB by 35% to 41,600, this will make up 35.2% of the population in Conwy.

67% of the workforce is below 50 years old.

Population estimates for Conwy County Borough show a large gap in the age structure between the ages of 18 to 40.

If past trends continue, it is predicted that by 2039 those aged under 25 will make up only 25% of the population (when it is currently 27%).

2.2.3 Ethnicity

The Conwy Economic Growth Strategy (2017 – 2027) provides the following relevant data relating to the population of Conwy:

- 95.4% of the population in the county are White British, 2.3% are White not British and 2.3% are Mixed or Other ethnic groups.
- 54.4% of the population in the county were born in Wales, and 4.3% of the population in Conwy were born outside of the UK.
- 47.6% of residents in Conwy consider themselves to be Welsh, compared to 65.8% in Wales.
- 5.8% of all children educated in Conwy schools are other than White British.
- In 2013/14 there were 1,809 hate crimes reported in Wales to the police, of which 1,368 (76%) were race hate crime.

2.2.4 Gender

The Conwy Economic Growth Strategy (2017 – 2027) provides the following relevant data relating to the population of Conwy:

- 51.4% of the population in the county are female.
- Men are less likely than women to access a range of health services.
- Physical activity rates are lower for women and girls (23%) than men and boys (38%).
- Men are more likely to be more overweight or obese than women (61 % of men compared to 54% of women).
- Alcohol consumption (above the recommended daily guidelines) rates are higher for men than women (46% of men compared to 35% of women).
- In 2015/16 53% of boys achieved Level 2 in core subjects (A* - C GCSE) compared to 59.2% of girls.

2.2.5 Disability

The Conwy Economic Growth Strategy (2017 – 2027) provides the following relevant data:

- 21.2% of the population (according to the annual population survey 2015/16) had a work-limiting disability.
- 23% of disabled people had to turn down a job due to lack of accessible transport.
- In 2013/14 there were 1,809 hate crimes reported in Wales to the police, of which 122 (8%) were disability hate crimes.

2.2.6 Welsh Language

According to the Annual Population Survey (2015), around 36% of the population aged 3 years old or over are Welsh speakers, which is considerably higher than the all-Wales figure of 27%.

2.2.7 Wellbeing

The Conwy & Denbighshire Wellbeing Assessment 2022 found that local people would like to see:

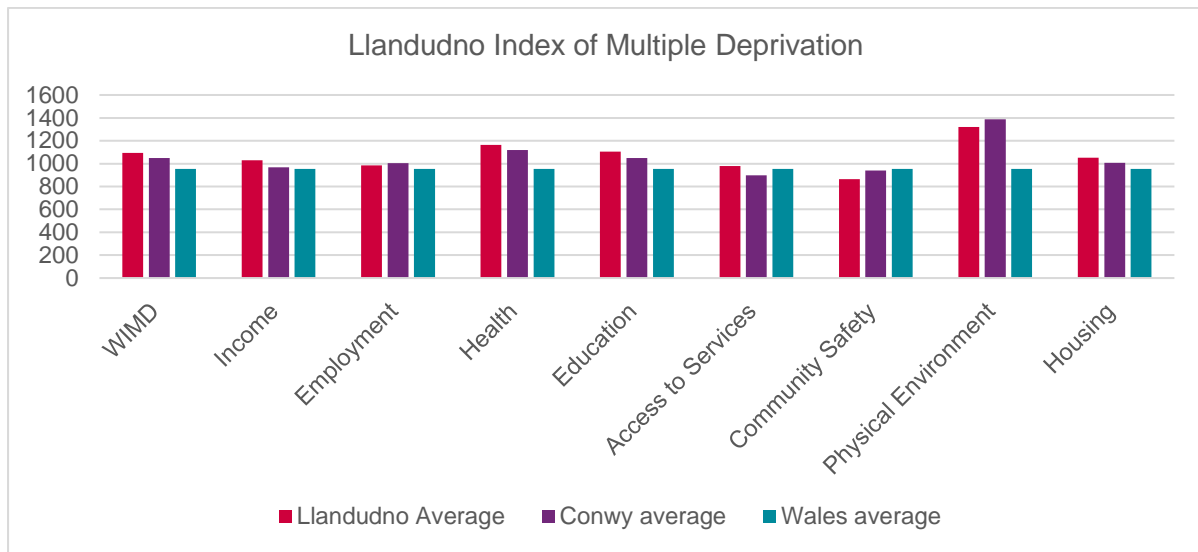
- Employment and business opportunities capable of providing prosperity.
- Providing access to goods and services locally.
- Retaining or attracting young people to live in the area.
- Better quality and higher paid jobs.
- Companies "giving back" to communities.
- Equality in employment, especially pay research.
- Support for local businesses with reduced rates, rents, and better lease terms.
- More job opportunities for those with disabilities.
- More diverse range of job opportunities, outside of the tourism and hospitality sectors, and tackling the seasonality of many jobs.

2.2.8 Deprivation

The table below shows Welsh Index of Multiple Deprivation (WIMD) average scores for Llandudno and compares them with the average scores for both Conwy and Wales. The graph shows that Llandudno's physical environment scores particularly well, compared to the Welsh average, and is similar to the Conwy average. Housing is performing slightly better than Conwy and Welsh averages. Community safety is performing slightly worse than the Welsh and Conwy average.

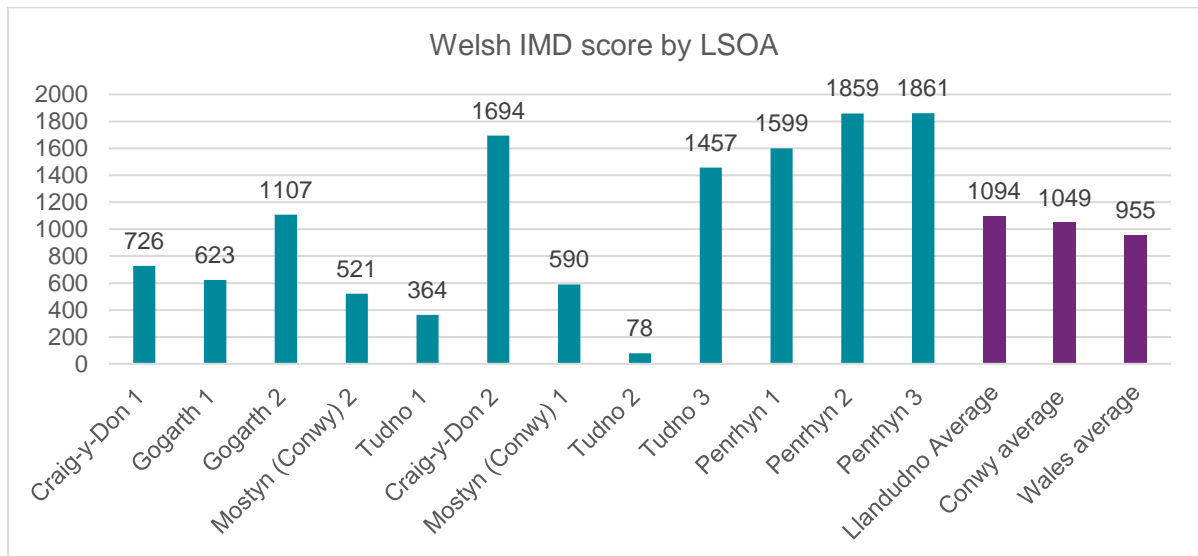
LLANDUDNO SUPPLEMENTARY TECHNICAL REPORT

Figure 1: Llandudno Index of Multiple Deprivation



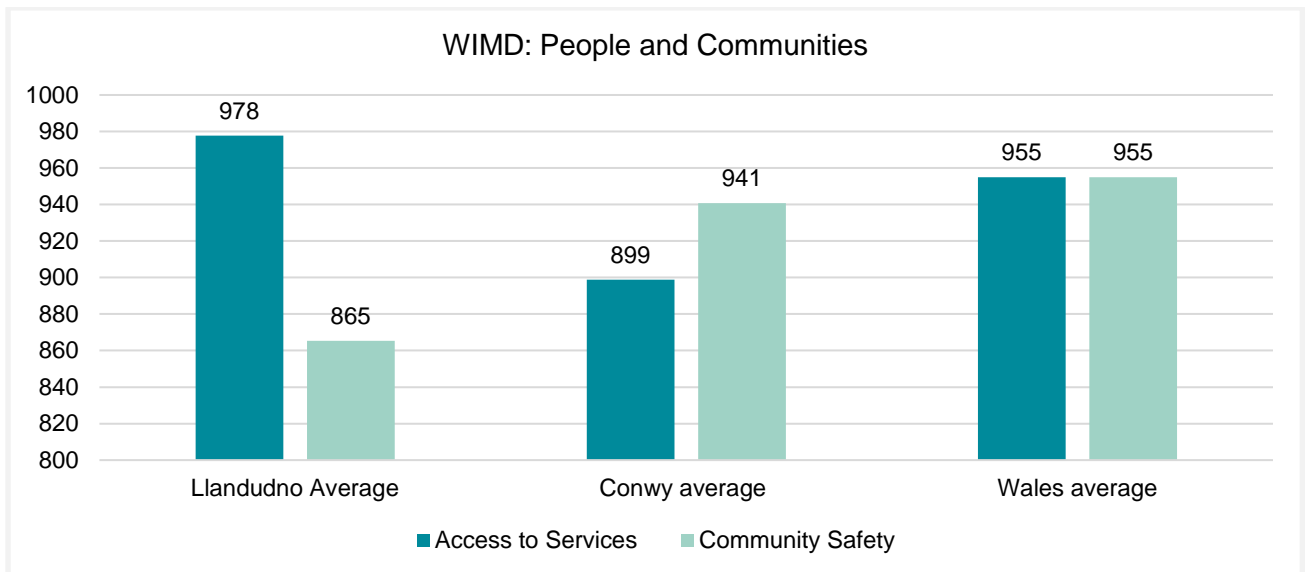
The graph below highlights the deprivation in the ward Tudno 2, and further deprivation in the Tudno area. Penrhyn is a much more affluent area compared to Llandudno on average, but also regionally and nationally.

Figure 2: Welsh IMD Score



The graph below shows that the access to services score is much higher for Llandudno residents than community safety. Whilst it is a positive that access to services is so reliable, community safety is an imperative factor to keep residents living in Llandudno, and for attracting new residents and visitors. Therefore, improving this should be an area of focus for the Council.

Figure 3: Welsh IMD Scores

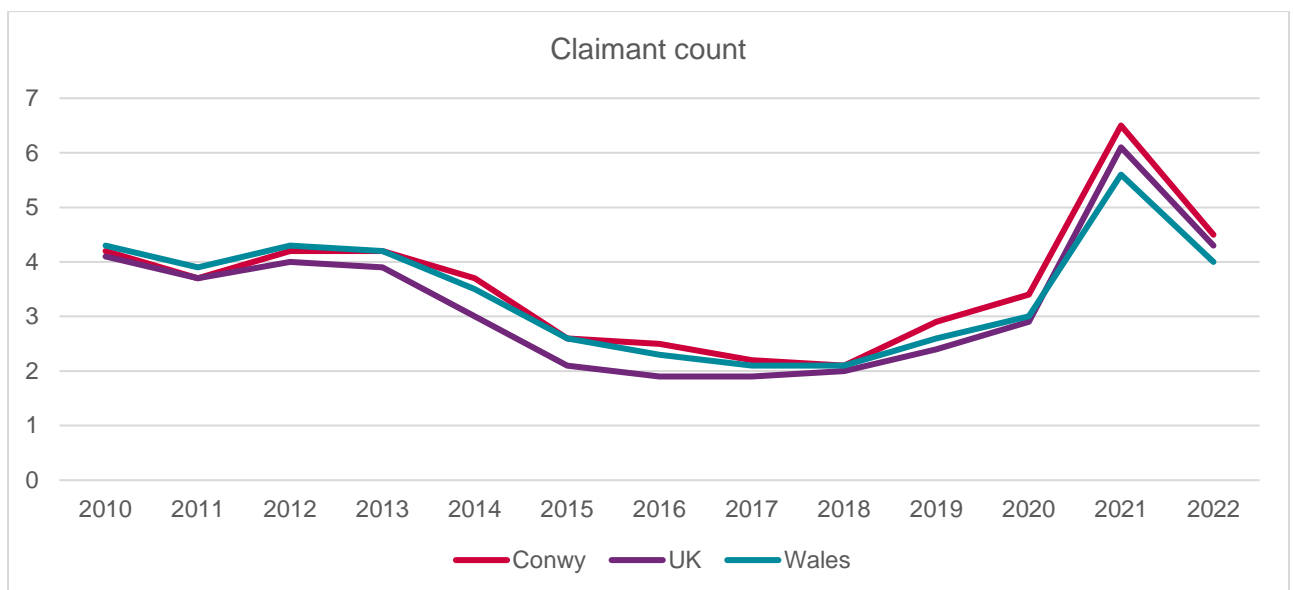


2.3 Business and Investment

2.3.1 Unemployment and Wage Levels

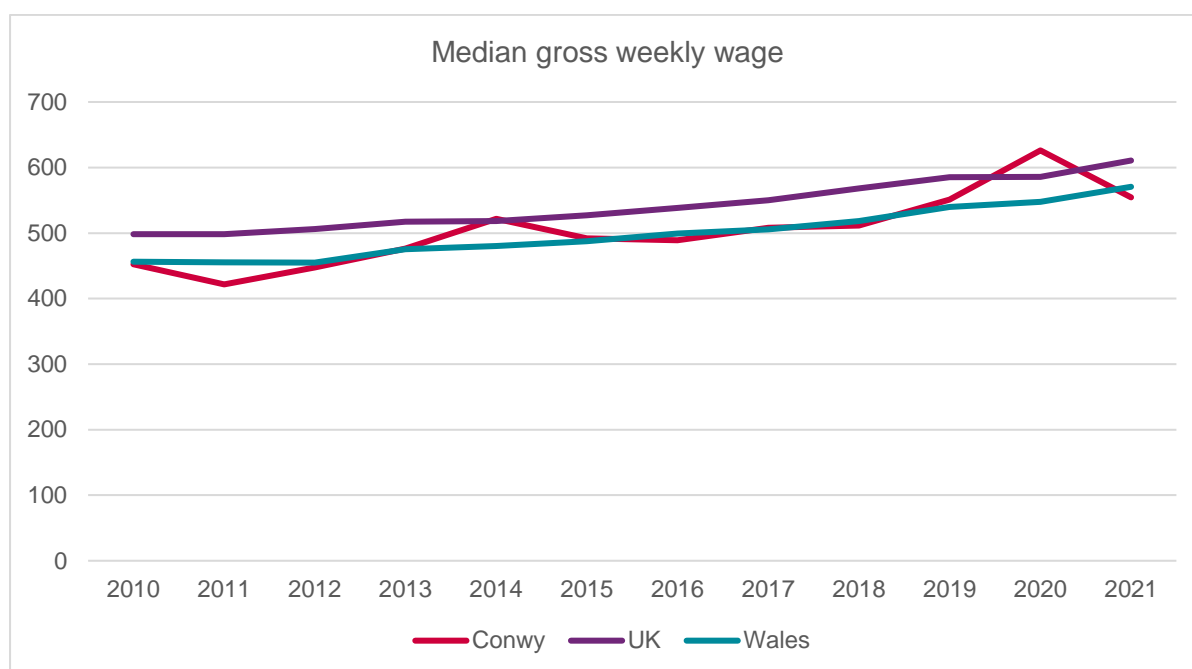
The claimant count for Conwy is static (allowing for the spike attributed to the Covid-19 pandemic), indicating a relatively prosperous area with good employment opportunities.

Figure 4: Conwy Claimant Count



Wage levels are similar (if slightly lower) to the rest of Wales, but lower than the UK. This could reflect the relatively low pay received by a workforce that is largely in the hospitality sector.

Figure 5: Conwy Wage Levels



2.3.2 Employment by Sector

The structure of employment by sector in Llandudno is shown in the table below.

Table 3: Employment by Sector

Accommodation/Food	16.7%
Health	16.7%
Retail	10.7%
Education	10.7%
Construction	6.9%
Professional, scientific and technical	5.4%
Manufacturing	3.6%

The main sectors of employment are accommodation/food, health and retail. Employment opportunities in accommodation/food sector are increasing, whilst they are declining in retail and remaining static in the health sector.

2.3.3 Hospitality and Tourism Sector

2.3.3.1 Visitors

The Llandudno Tourism Study (2019) indicates that Llandudno's visitor profile contains a large proportion within the 65+ age category (42%) and in the 55-64 age category (18%). Visitors tend to be couples (65%) or singles (24%) with a relatively small proportion of visitor's families with children (10%). While the lack of families may have an adverse knock-on effect in terms of future visitors, the dominance of couples and singles has a positive short-term impact due to these visitors having a higher associated spend.

Table 4: Visitor Demographics

LLANDUDNO SUPPLEMENTARY TECHNICAL REPORT

	Age group	Score on the graph	%
Couples	Over 65	350	35%
	55-64	275	28%
	45-54	150	15%
Families	45-54. With older children	120	12%
	35-44 With younger children	100	10%

While the current performance of the tourism sector is positive, a lack of focus on attracting younger generations – particularly within the family bracket – could be damaging in the future. Anecdotally the number of hotels dealing solely with coach operators aimed at older people seems to be declining. The average age of the people visiting seems to have become lower in recent years. Hotels do seem to be beginning to cater more for younger people who want to stay.

Llandudno also attracts business visitors through conferences and shows at Venue Cymru and many of them stay at the larger hotels. This is a key market and provides the opportunity to promote the town for social visits by these visitors.

Length of Visit

There is a high volume of day visitors suggesting more needs to be done to offer a reason to stay longer.

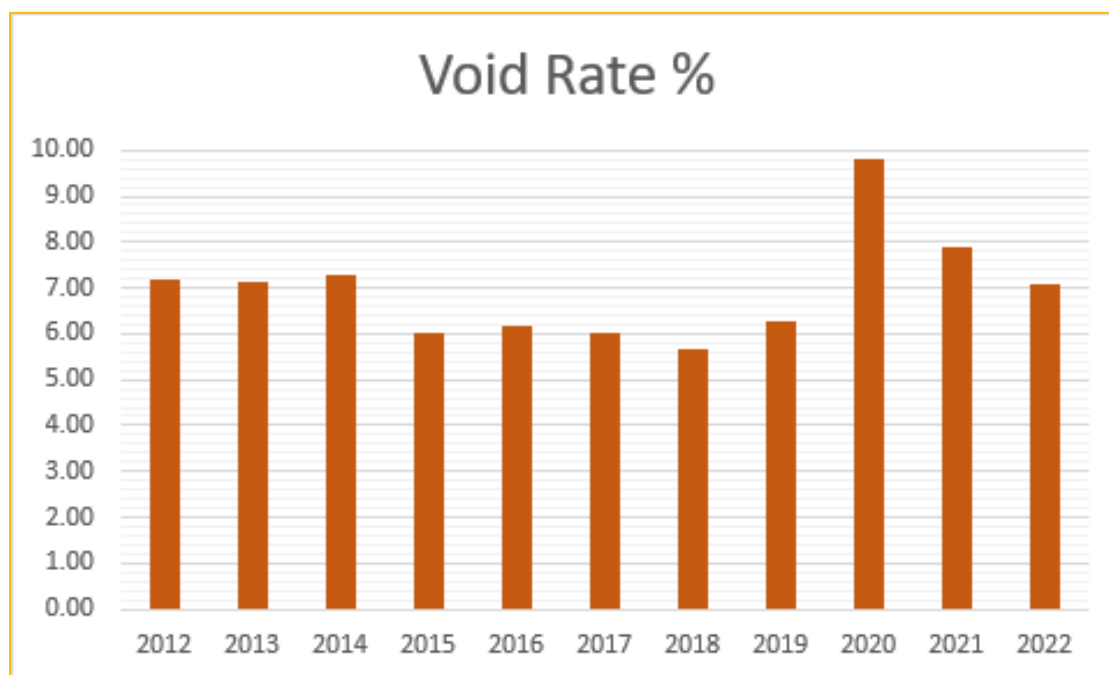
Table 5: Length of Visit

Length of next visit	%
Few days	32%
Week	32%
Day	12%
Weekend	11%

Retail and Hospitality Space

Of the 367 retail units, there is a 7% void level, which is lower than Wales and UK averages. This represents circa 18 vacant units of which 3 are shortly to be occupied. The void rate is expected to be around 5% by June 2022 and illustrates the town's positive recovery from the pandemic (see graph below).

Figure 6: Llandudno Void Rate



There are 10,200 visitor bed spaces, which are close to full capacity (97-99%) in the summer months.

2.3.4 Emerging Sectors

The following proposed projects point to the energy sector being a potentially important emerging sector for the region. These projects will require a range of lower skilled, skilled and specialist roles and this could create local employment opportunities in Llandudno:

2.3.5 Tidal Energy: An Economic Impact Assessment (EIA) delivered by Wrexham's Glyndwr University on a proposal for a £7 billion tidal lagoon stretching between Prestatyn and Llandudno, has found it could create 22,000 in North Wales.

2.3.6 Nuclear Power: A new nuclear power plant is being explored on the site of the former Wylfa nuclear plant on Anglesey. Wylfa is now the subject of dialogue between the UK government and US power and engineering companies and has the potential to increase UK energy capacity.

2.3.7 HyNet North West: An industrial decarbonisation project to produce, store and distribute low carbon hydrogen, and capture and lock-up CO2 emissions.

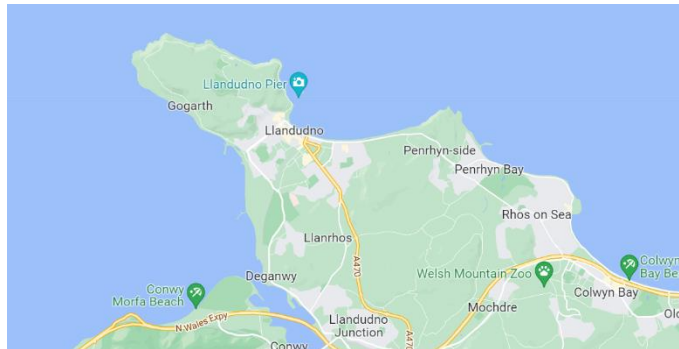
2.4 Access and Movement

2.4.1 Access

The town and community of Llandudno is highly influenced by tourism and visitors throughout the year but overwhelmingly in the summer months. Car parking in the main summer months is problematic for residents and visitors, who may struggle to find a suitable space, and this could potentially give a poor first impression of the town.

Visitors travel from across the UK but primarily from North West England and the English West Midlands. The main access routes to the town are the railway via Llandudno Junction and the A55 North Wales Expressway which links Cheshire and North Wales.

With Llandudno itself located on the Northern tip of a promontory, access is severely restricted with one primary road in and out (the A470). This road is not capable of handling summer traffic levels and often has significant delays in accessing and leaving the town.



Access into Llandudno and the issues presented are well known to Conwy Council and the Traffic Department. The Authority contributed significantly to a recent access and traffic planning exercise undertaken by Transport for Wales (TfW). The clear steer from officers contacted through this exercise was to follow the recommendations of that report to avoid duplication and conflicting workstreams. The primary focus of the report is the move towards area wide Active Travel including significantly improved walking, cycling and bus/park-and-ride routes into, and around, the town.

It should also be noted that Llandudno is ideally placed to take advantage of the forthcoming improvements delivered by the TfW North Wales Metro scheme. The programme has been designed to transform rail, bus and active travel services across North Wales. It will make it easier and faster to travel by rail across North Wales and build better connections with the Northwest of England. This will help create more opportunities for local communities and support inward investment for the area.

2.4.2 Traffic Access

As highlighted above, access to the town is severely constrained by the restrictive geography and the one primary access and egress route (the A470). There are further routes into the town from Deganwy to the West and Penrhyn Bay to the East, but these are through suburban areas with significant traffic calming measures making them unsuitable for significant traffic flows.

The A470 itself (Conwy Road) is currently operating at capacity with significant measures having been installed to improve traffic flows where possible. Entering the town from Deganwy along the A546 will lead to entering at West Shore and travelling along Gloddaeth Street across to the North Shore and the primary attractions and amenities. Gloddaeth Street could benefit from some further traffic measures, primarily around parking restrictions, traffic flows and sequencing and perhaps additional deck parking to ground level car parks.

At the North Shore end of Gloddaeth Street, the traffic merges with the main East to West route along the shoreline. Again, this route is operating at peak capacity for most of the main tourist season but could potentially benefit from small scale interventions concerning parking restrictions, traffic flow management and regulation of traffic flows joining the road. Traffic access to the Great Orme from both the North Shore and the West Shore is constrained by the narrow streets, predominantly lined with private residences. There is parking provision at the Great Orme itself, but this is limited and often full. Improvements to access to the site are very limited in their scope and consist primarily of amending parking restrictions and minor improvements to traffic flows.

2.4.3 Parking

Parking in and around the town is provided through a combination of on-street, metered parking, privately owned car parks, such as the 360 space multi storey and a

handful of dedicated, local authority car parks of which The Parade is the largest with some 340 spaces. Parking is therefore a significant issue in the summer months, particularly for residents and for visitors who may drive around for some considerable time and arrive at the resort in bad frame of mind that is not conducive to spending money in the town.

Further, larger car parking provision is available in the retail parks to the south of Llandudno on the A470, but these may perhaps be located too far from the town's amenities to be a viable option for parking.

There is an opportunity to improve car parking with the following potential measures:

- A Park and Ride system, perhaps from Bodafon fields
- An additional deck car parking on Gloddaeth Street.

2.4.4 Pedestrian Footfall

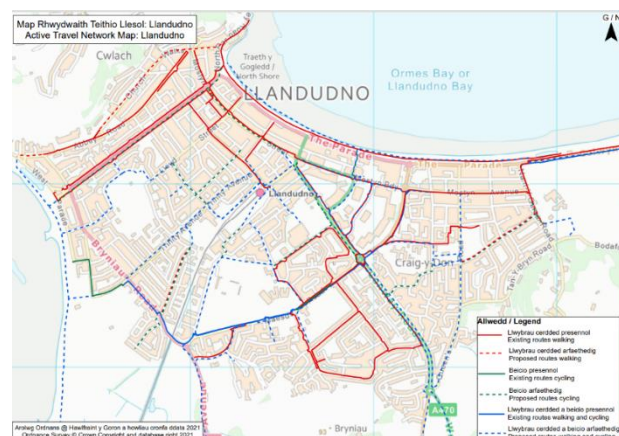
Some parts of the town are much quieter than others and seem under-utilised.

Greater footfall could be created between the following key areas:

- Between West and East on the Promenade on North shore
- Between High Street and the two retail parks. The town centre is already seeing a decline in footfall due to the relocation of Marks & Spencer.
- Between West Shore and North Shore

2.4.5 Active Travel

The Welsh Government has set significant targets for improving options for sustainable active travel across Wales, including for Llandudno and the surrounding areas. Better cycle and walking routes along with enhanced cycle storage and servicing provision are a key enabler to improving access to, and travel around, Llandudno. The proposed improvements of the walking and cycling routes are shown in the adjacent maps and will inevitably have an impact on traffic flows around the town. Currently policy dictates that these routes should take priority wherever possible.



2.4.6 Rail Connections

As noted above, Llandudno is ideally located to take advantage of the North Wales Metro scheme and the improvements which it will bring. The investment from TfW, Welsh Government and other local stakeholders is aimed at encouraging better and more sustainable travel choices and will include:

- A new hourly service between Liverpool and Llandudno.
- The extension of the current Llandudno to Manchester Airport service to include Bangor.

- A new service every two hours between Liverpool to Cardiff, with an hourly service between Shrewsbury and Liverpool. While not directly serving Llandudno, these services will provide significantly improved connections to the network.
- Improved connectivity between North Wales and key destinations within the UK with links to HS2 and Northern Powerhouse Rail.

2.5 Living in Llandudno

2.5.1 Housing and Homelessness

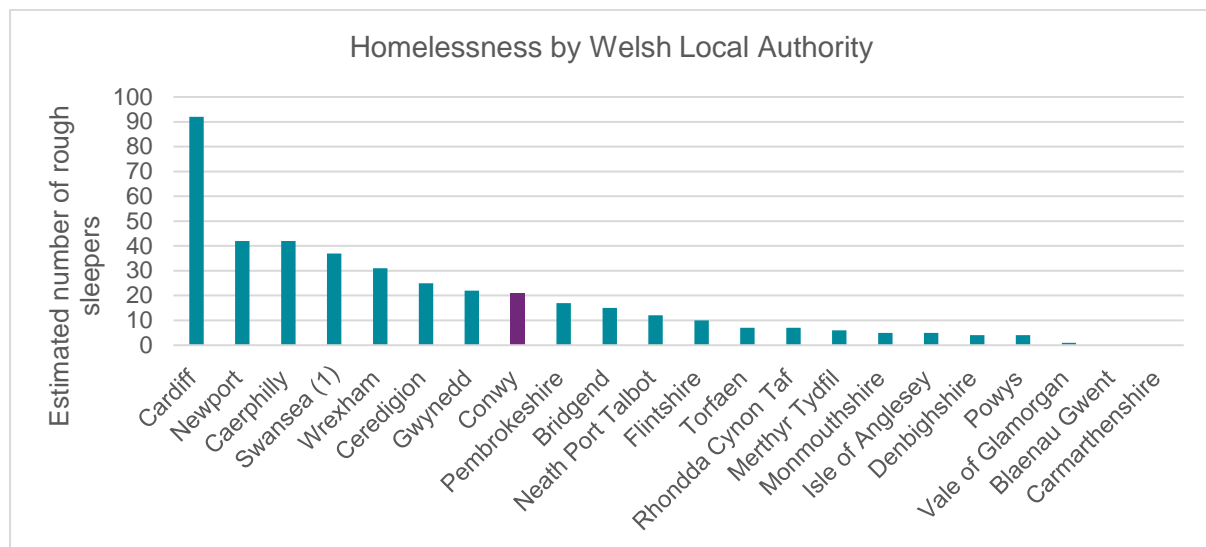
The principal findings of the Local Housing Market Assessment (LHMA 2018-22) are that Conwy County needs more affordable housing, and the current supply is failing to meet a growing demand.

The market analysis indicates that 46% of first-time buyers and newly forming households are priced out of the market, both to rent and to buy. Industry-accepted definitions of affordable housing costs suggest that spending more than 30% of household income on housing costs is unsustainable. The assessment indicates that 34% of new households could only afford social housing rents and only 12% are able to afford low-cost home ownership (intermediate) schemes. Conwy County has the second lowest percentage of social housing stock in Wales, so many lower income households must nevertheless rely on the private sector. As 90% of marketed properties are more expensive than the Local Housing Allowance for their size, the assessment recommends that more affordable housing is required now than previously.

The LHMA concludes that 1,240 additional affordable homes are required between 2017 and 2022; 248 units per year. If we include 'committed supply' units which already have planning permission or have been awarded capital grant funding but are not yet built, the total number of affordable units required is 1,945. To meet demand, the towns need 389 new affordable homes to be built each year, for the next five years.

Conwy County's average household size is decreasing as the number of single person households increase, and average family sizes decrease. Therefore, it is proposed that new residential developments consider an appropriate mix of housing types on new sites in order to cater for this change.

Figure 7: Homelessness in Wales



2.5.2 New Housing Developments

A development of 77 houses and flats, which are expected to be 100% affordable or social housing, has been recently approved next to the railway station on Builder Street, Llandudno (see map).

A further confirmed site is the site at Nant Y Gamar Road.

Land at Nant y Gamar Road:

- Allocated for housing in the Local Development Plan.
- Recent application for 49 dwellings (including 17 affordable housing units)
- Planning Committee is expected to refuse, partly due to the impact on local school.



3. Policy Review

3.1 Overview

This section reviews key policy documentation to understand the direction of plans and strategic objectives for Llandudno. This provides the basis for strategic policy alignment between the 10 year Regeneration Plan and other policies across the key themes.

3.2 Conwy Culture Strategy

The Conwy Culture Strategy (2021-26) seeks to put meaningful cultural experiences at the heart of post-Covid-19 regeneration to drive positive change. To enable this there is a strong focus on accessibility and inclusivity to ensure culture is accessible, fun and relevant to everyone, including those that have not traditionally been engaged.

There are also strong evidential links drawn between culture and wellbeing and encouraging people to be more connected with cultural and civic life.

The aims of Conwy's cultural programming are:

- Culture is accessible to everyone and is a big part of everyday life in Conwy.
- Visitors to Conwy will be wowed by Conwy's culture.
- Conwy's cultural offer is unique and cutting edge.

Key activities and initiatives in the strategy include:

Funding: building on the bursary scheme initiated by Imagine Colwyn Bay, to strengthen the resilience capacity of the arts sector, increase access to funding and space through the finance and asset strategy, and develop people through a creative education strategy.

Sustainable jobs: changing perceptions of the tourism and hospitality sector to offer exciting and diverse career prospects. Creating a year-round cultural tourism model which can help create more sustainable jobs and ensure growth, especially with the night-time economy.

Launchpad areas: these areas will bring local people and their ideas and creativity together through local projects. The focus is on building stronger networks between venues and fostering joined-up projects.

Food: showcasing local produce, sustainability and the diverse food offering that encourage visitors to explore the rest of the county and stay longer.

3.3 Llandudno Tourism Study

The Llandudno Tourism Study was delivered in 2019 and the key findings are:

Llandudno is established as a premier Welsh and UK-wide seaside destination. Its easy accessibility affords visitors the ability to take in the traditional seaside offer while having a major retail centre, accommodation providers and food and drink establishments all within a 5-minute walk of one another.

The tourism sector in Llandudno has demonstrated strong performance over recent years:

- Based on indications from the Great British Tourism Survey and STEAM data, Llandudno is expected to have received 2.84 million day visitors in 2017.
- The total number of overnight trips taken to Llandudno has shown an increase of 19.2% between 2008 and 2015. The annual figure for 2008 was 355,000 overnight trips, rising to 423,000 in 2015. Llandudno received 26,000 visitors from overseas during 2016.
- Most international visitors were from Ireland.
- The total economic impact of tourism in Llandudno was £384 million in 2017, up from £296m in 2012. Tourism employment has also been on a generally positive trajectory, rising from 4,606 in 2012 to 5,328 in 2017, including indirect employment generated by tourism

However, the area today faces very different challenges to that of the past, with tourism becoming an increasingly competitive market both domestically and internationally. It

is therefore vital that Llandudno continues to adapt and innovate to remain a prime tourism location for people in the UK and beyond.

This will mean identifying the emerging trends facing the tourism sector and being proactive to plan for changes such as the increasing focus on gathering “experiences” across all demographic groups. Other challenges include embracing the fundamental role of technology both in destination choice and in the tourism product, lower levels of visitor loyalty, demographic, societal and economic changes and lifestyle factors such as increasing levels of flexible working.

Considering the increasing levels of competition between destinations, Llandudno must continue to invest in its tourism product. The report provides an analysis of the wider tourism market and other destinations has highlighted several areas in which action may be required and provides a summary of potential ideas.

3.4 Conwy Local Development Plan

The Local Development Plan aims to improve the economic, social, environmental and cultural well-being on Conwy by 2033 and ‘Creating Greater Opportunities to Live, Work and Visit’.

By looking at the concept of placemaking and sustainable development it will embed the Well-being of Future Generations Act (2015) and create sustainable places, social inclusion, and improved well-being.

Within the Preferred Strategy for consultation in preparing the Replacement Local Development Plan the approach to achieve this vision is through four supporting sections that will contribute to placemaking and sustainable development:

- Placemaking in Conwy.
- Sustainable Placemaking.
- Prosperous Places in Conwy.
- Healthy & Social Places in Conwy.
- Natural and Cultural Places in Conwy.

Placemaking takes a holistic approach to the planning and design of development creating public spaces that promote well-being. Strategic placemaking issues are considered focussing on integrating strategic policies that form the development process and a prosperous economy is designed using locations that are accessible and sustainable promoting healthy lifestyles through green infrastructure.

New growth needed by 2033 within the strategy is understood to propose 1,800 new jobs and 4,300 homes with 1,800 affordable homes. Two strategic areas for growth focus are the Coastal Development Strategy Area and the Rural Development Strategy Area.

3.5 North Wales Skills & Employment Plan

The North Wales Skills & Employment Plan (2019-22) aims to ensure that local people and businesses can maximise opportunities that arise from the £1billion North Wales Growth Deal and breaking the cycle of low skills, low wages, and low productivity, to reduce the number of people who are unemployed or economically inactive.

Key issues underpinning the activities and initiatives in the plan include:

Work readiness: Addressing the need for more work ready skills and employability skills that employers feel is missing, and more focus on development of transferable employability skills. Exploring how to provide skills that build on self-management, social intelligence, and innovation so the workforce can be more agile and resilient to economic and social drivers behind how work is changing,

Green innovation: Maximising the opportunities of promoting the region as one of the leading locations for low carbon energy generation and energy related supply chain investment.

Building the tourism offer: Llandudno as a key hub in North Wales as a centre of excellence for high-value tourism. Raising awareness of the diversity of career opportunities within tourism and aspirations as a career choice. Exploring apprenticeship opportunities as a route into the hospitality and tourism sector.

The strategy also points to specific skills gaps that have relevance to the future development of Llandudno and its key employment sectors:

- **Skilled production:** including project managers, quality control specialists, process engineers, lean management, logistics management, engineering drawings, vehicle and trailer manufacturing and machinery manufacturing, process/plant/machine operatives.
- **Leisure and hospitality:** areas including caring, leisure and service roles, sales and customer service, chefs, front of house, reception, SPA, beauty, media, sales, food and beverage assistants, business management, general labourers, bar staff, tourist guides, and skilled horticulturists.
- **Management:** areas including quality assurance and technical managers, automation engineers, engineering, technical, health and safety, HR.

3.6 Conwy Economic Growth Strategy

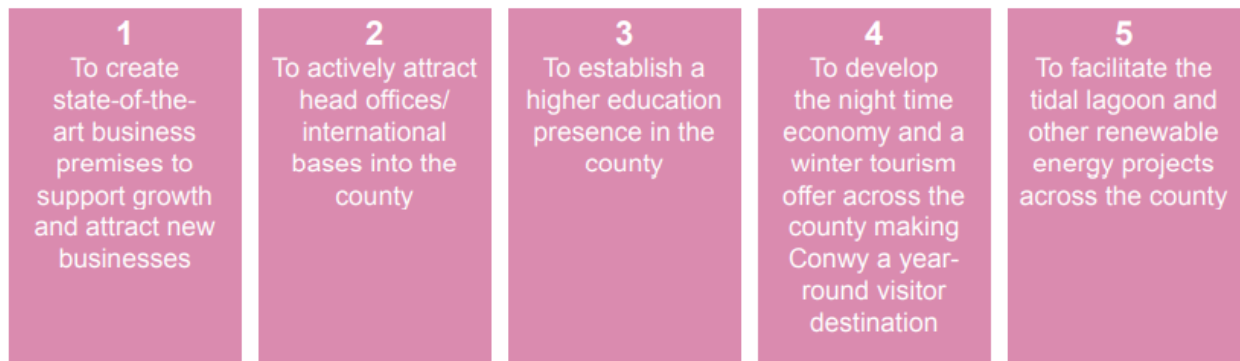
The strategy highlights the aspirations of Conwy which are to increase productivity, competitiveness and growth and strategic developments in the region to increase the GVA of North Wales to £20billion by 2035 and creating 120,000 jobs. The aim is to also strengthen the SME economy and address key challenges around low wages and part-time seasonal jobs and the loss of young people to outward migration.

Cross-cutting themes are:

- Employment, skills, and apprenticeships
- Infrastructure that enables growth
- Transformational tourism
- Making the Conwy pound work harder
- Dynamic leadership
- A confident, outward looking approach

LLANDUDNO SUPPLEMENTARY TECHNICAL REPORT

The five ambitions to grow Conwy County's economy are:



This vision will look to deliver goals which support the overarching ambition, including:

- £1bn economic value of tourism to the county
- 3,500 additional PAYE jobs within the county
- Increase in the proportion of full-time jobs from 59% to 70%
- Increase average salary to 95% of the UK average

LLANDUDNO SUPPLEMENTARY TECHNICAL REPORT

3.7 Policy Alignment

Table 6: Policy Alignment

Document	People & Communities	Business & Investment	Access & Movement	Living In Llandudno	Notes
<p>Conwy Economic Growth Strategy 2017 – 2027</p>	<p>1 in 4 jobs directly linked to tourism (Conwy-possibly higher in Llandudno)</p> <p>3rd sector delivering economic outputs – Established Economic Growth Board Conwy County Council (6 themes, 5 ambitions inc 1,3,4)</p> <p>Lack of trained medical staff to meet the region’s needs.</p> <p>Tourism skills offer (Tourism & Hospitality Centre of Excellence – Rhos on Sea)</p>	<p>Significant number of SMEs and micro businesses</p> <p>Seasonal to year-round employment</p> <p>Partnerships with Mersey Dee Alliance and Cheshire & Warrington LEP.</p> <p>Increasing trend of business start-ups</p> <p>Establishment of head offices to retain talent and raise GVA figures.</p>	<p>Sustainable destination management is required.</p> <p>Good road and rails links.</p>	<p>TripAdvisor 4th best destination and best seaside town in the UK</p>	<p>USP – Adventure & Heritage</p> <p>Improve food & retail offer and develop night-time economy in town centres to underpin further growth with the core in Venue Cymru.</p> <p>To attract visitors between November and February.</p> <p>Strengthening the arts offer ‘sense of place’.</p> <p>To attract - University offer and HE campus to attract a night- time economy and support the all-year round offer. Also, to offer links between HE and business.</p>
<p>Conwy Culture Strategy</p>	<p>Explore the feasibility of a range of culture-for-wellbeing partnership projects including social prescribing and arts-in-health initiatives, which will</p>	<p>140 Freelancers have been supported in Conwy through the Cultural Recovery Fund. Build upon this support and link with the work of Creative Wales who are developing a</p>		<p>New cultural programming developed with local artists, creative people and organisations and where possible could</p>	<p>Imagine Trail, an ambitious Augmented Reality App is being developed as part of the National Lottery</p>

LLANDUDNO SUPPLEMENTARY TECHNICAL REPORT

Document	People & Communities	Business & Investment	Access & Movement	Living In Llandudno	Notes
	<p>be identified through further research and development during the action planning process.</p> <p>Cultural Passport available to both local people and visitors, could include financial or other incentives, such as offers and exclusive entry at certain times. It could also be used to generate bespoke itineraries based on an individual's specific interests. It could tie in with existing apps such as the Imagine Trail App in Colwyn Bay.</p>	<p>Freelancer Pledge to foster effective working between the public sector and creative freelancers.</p> <p>Tourism Ambassador Programme, aimed at community and tourism businesses, which includes modules on local attractions, heritage and arts. This will play a crucial role in upskilling staff working in the sector and support the wider community to engage more with tourism.</p>		<p>make use of iconic cultural assets as a backdrop.</p> <p>Spaces to become backdrops for cultural activity with a national and international appeal that gets local people excited and involved.</p> <p>Create a cluster of cultural Launchpads focused upon the county's five largest towns, Abergele, Colwyn Bay, Conwy, Llandudno, and Llanrwst.</p>	<p>Heritage Fund Great Place Scheme, Imagine Colwyn Bay.</p> <p>Establish local cultural partnerships or Town Teams to oversee and deliver the 5 Launchpads. These creative alliances will feed in to the larger strategic 'Culture Conwy' body.</p>
Llandudno Tourism Study	<p>Balance the need to invest in tourism offer with supporting growth of wider economy and communities. Local people will generate demand for same visitor amenities and services.</p> <p>Rise in those staying in "other" accommodation such as Airbnb, with approximately 80 establishments listed in and around Llandudno. People are staying in local</p>	<p>Grow night-time economy, especially food and drink offer.</p> <p>Increase accommodation capacity, widen type of accommodation, invest in quality of existing. Adding more serviced apartments/aparthotels in diversifying its accommodation mix.</p>	<p>Current transport conditions, such as a lack of frequent rail services into Llandudno town centre, sporadic bus services and congestion on the A55 affect Llandudno's tourism sector.</p> <p>Impact on communities and retailers when events shut key routes in and out of the town.</p>	<p>Rise of flexible working has been hastened by new and mobile technologies which mean that people are able to work whilst on the move or from other locations, particularly amongst younger and more entrepreneurial workers.</p> <p>Llandudno is not currently renowned as</p>	<p>Currently unclear what the growth and development aspirations are for the town that could support investment and activity in the tourism sector and wider economy.</p>

LLANDUDNO SUPPLEMENTARY TECHNICAL REPORT

Document	People & Communities	Business & Investment	Access & Movement	Living In Llandudno	Notes
	<p>communities as well as tourist areas.</p> <p>Differences in needs and preferences for different demographics and between different generations, driving change in technology, social awareness, economic activity.</p>	<p>Opportunities to grow activities base with new attractions and events.</p> <p>Healthy retail offer, low vacancy rates.</p> <p>The total economic impact of tourism in Llandudno was £384 million in 2017, up from £296m in 2012.</p>	<p>Focus on attaining complete accessibility of buildings and services within the context of the built environment.</p> <p>Government pledge to ban conventional petrol and diesel cars by 2040 - just 4 EV charging points in Llandudno currently.</p>	<p>an activity orientated destination.</p> <p>How family friendly facilities can be presented in the area without detracting from its attractive character.</p> <p>Integration of the beach into the events calendar.</p> <p>Refurbishment of the promenade shelters.</p>	
<p>Conwy Local Development Plan</p> <p>LDP 2018-2033 Preferred Strategy</p>	<p>Ensure that communities are near existing community facilities, public services and key amenities.</p> <p>Increased accessibility and quality of open space provision.</p> <p>Raising the profile of the Welsh Language.</p> <p>Healthy & Social Places.</p> <p>Population expected to grow 5.6%.</p>	<p>12-13 hectares of business land will be required up to 2033.</p> <p>Local employment sites require safeguarding to support communities.</p> <p>4,784 outflow of residents.</p> <p>Part of North Wales Growth Deal.</p> <p>New employment land to run alongside the A55.</p> <p>Tourism development to be sympathetic in nature and scale to the local environment.</p>	<p>Encourage active travel, green infrastructure.</p> <p>Active travel routes are described as being poor and lacking investment.</p> <p>Coastal highways capacity issues.</p> <p>Extending the choice of sustainable transport</p>	<p>Conwy has an aging population which puts pressure on public and social services.</p> <p>Retaining 18–40-year-olds is an issue.</p>	<p>Good design and placemaking – how space is used, how public realm supports this use.</p> <p>Promote high quality architecture and design to strengthen local distinctiveness.</p>
<p>North Wales Skills & Employment Plan</p>	<p>Improve standards of literacy and numeracy, digital and bilingual competency.</p>	<p>Support businesses to take advantage of new approaches such as decarbonisation,</p>		<p>North Wales has highest proportion of Welsh speakers in Wales, at an estimated</p>	<p>The Growth deal aims to support 6% GVA uplift in our economy by</p>

LLANDUDNO SUPPLEMENTARY TECHNICAL REPORT

Document	People & Communities	Business & Investment	Access & Movement	Living In Llandudno	Notes
	<p>Promote adult learning to support skills development, health and wellbeing, social engagement and integration.</p> <p>Ensure women can achieve and prosper by ensuring the potential female workforce is maximised in the region, especially in under-represented sectors.</p> <p>Improve employment opportunities for disabled people and those with long term health conditions, in inclusive and supportive workplaces.</p> <p>Innovation and business development skills are required in the tourism and hospitality sector.</p> <p>Recruitment and retention are a critical issue and most difficult in Tourism and Hospitality and Health and Social Care sectors.</p>	<p>automation, Artificial Intelligence, digitalisation.</p> <p>46.4% of jobs in Wales have a high potential for change through automation.</p> <p>98.5% enterprises in North Wales employing under 50 employees, barriers to growth beyond 50.</p> <p>Predicted 2% growth in management and professional occupations, and 1% growth in sales and customer service jobs.</p> <p>Tourism/Hospitality: Recruitment is a crucial issue and could be exacerbated by Brexit. Update perception of sector and career opportunities and raise aspirations. Promote the value of apprenticeship opportunities. Demand is growing. Nature of demand is changing from service deliverer to experience stager.</p> <p>Food/Farming: Upskill for digitalisation potential and digital skills to enable potential new growth and diversification. Predicted</p>		<p>42.7%. Achieve a million Welsh speakers by 2050.</p> <p>North Wales predicted increase in over 65-year-olds and decrease in working age population.</p>	<p>creating 4,298 high value jobs and £1billion total investment.</p>

LLANDUDNO SUPPLEMENTARY TECHNICAL REPORT

Document	People & Communities	Business & Investment	Access & Movement	Living In Llandudno	Notes
		<p>growth 1% from 2019 – 2023.</p> <p>Energy/Env: Upskill workforce with new technology. Improve apprenticeship opportunities. Predicted growth 1.5% from 2019-2022.</p> <p>Creative/Digital: Ensure skills provision reflects diverse demand and rapid changes in technology. Careers information and guidance around understanding transferable skills and holistic navigation of career choices. Predicted growth 6% in digital sector from 2019-2023.</p>			

3.8. Net Zero Review

The Llandudno regeneration plan will contribute to net zero carbon targets and encourage business and individuals to embrace low carbon solutions and understand the benefits of net zero. The vision aligns to the Net Zero Wales and Beyond Recycling strategies.

Conwy County Borough Council have pledged to become a net zero carbon council by 2030 and help communities to become net zero carbon. The council seeks to deliver a decarbonisation plan and take responsibility for making the right choices for the future.

3.8.1 Welsh Government Net Zero Wales

The Net Zero Wales Plan sets out the decarbonisation journey in line with the Climate Change Committee (CCC). There is a requirement for a reduction in emissions and long-term systemic change where all are encouraged to embed the climate emergency in everything they do.

The targets and budgets were set following CCC recommendations:

- Carbon Budget 2 (2021-25): 37% average reduction.
- Carbon Budget 3 (2026-30): 58% average reduction.
- 2030: 63% reduction.
- 2040: 89% reduction.
- 2050: at least 100% reduction (net zero).

The strategy sets the conditions to drive down emissions and enable transition and a review of policies to support the net zero pathway. Policies to be reviewed for example will be planning policy, new infrastructure investment, digital strategy and a review of the skills required for a green recovery and transition to net zero.

3.8.2 Beyond Recycling Strategy

The strategy sets out several targets for the next 30 years to become net-zero by 2050. The aim is to create a circular economy and to keep resources in use for as long as possible to avoid waste and is aimed to accelerate action for a green economy, to help tackle inequality and support pandemic recovery. The strategy is structured with six core themes:

- Driving innovation in materials use: the consumption of materials is a higher rate than is sustainable. Aim: to apply models of hiring, lending and leasing. Looking at where the goods come from and prioritise the use of sustainable and low carbon materials
- Upscaling prevention and re-use: to reduce the amount of waste produced by households and businesses. Aim: to build on a cultural change in waste prevention and re-use, repair and remanufacture within communities and town centres.
- Building on our recycling record: develop additional infrastructure to collect and recycle and a requirement for non-domestic properties to recycle. Aim: continuing to drive improvements in recycling.

- Investing in infrastructure: work in partnership with LAs to develop 'eco-park' hubs and to put town centres at the heart of the approach and to support footfall. Aim: to improve recycling and ensure green resilient infrastructure.
- Enabling community and business action: support individuals, communities and businesses to drive change using role models and champions and resource efficiency entrepreneurs. Aim: facilitation of positive action and harnessing the enthusiasm of young people and unlocking new economic opportunities.
- Aligning Government levers: alignment of actions across the public sector. Aim: using government levers to support and drive progress.

3.8.3 Business Support

Actions to enable delivery are to support businesses to reduce their carbon footprint and becoming resource efficient and supporting local action and community environmental initiatives. Phasing out single-use plastic items and the eradication of avoidable food waste will have an impact on businesses who require support to limit waste.

The strategy drives a step change across the public sector and actions that are embedded in Conwy County Borough Council policy and part of the Corporate Plan have focused on influencing a sustainable recycling industry and with changes to procurement to use environmentally responsible providers.

3.8.4 Energy and Climate Change

The Net Zero Wales vision is for a decarbonised energy system and reducing emissions from fossil fuels by using low carbon sources. The approach is that they ask business and industry to support decarbonisation, and the use of Carbon Capture Utilisation and Storage (CCUS) and hydrogen.

The Destination Conwy Management Sub Group have identified sustainability as one of their objectives. They have discussed an electric vehicle charging network and are looking at funding available to encourage the take up of green technology. They are also looking at ways of reducing fuel bills for businesses through insulation, renewable energy and electric vehicle charging.

3.8.5 Transport

The Net Zero Wales ambition is to reduce emissions from passenger transport by 98% by 2050 through the uptake of low carbon technologies and to reduce the number of car miles travelled by 10% by 2030 by increasing trips by sustainable public transport. By 2025 10% of passenger travel will be zero emission and 48% of new car sales will be zero emission. This will require a network of electric vehicle charging points that will also service taxi and private hire vehicles as they move to zero emission. There is also a transition required for the transportation of freight and a continued electrification of the rail network, these can both be supplemented with hydrogen or hybrid technology.

Within the Beyond Recycling Strategy there is an action to introduce low-emission waste collection vehicles and investment in the infrastructure required to power them with renewable energy.

3.8.6 Outcomes

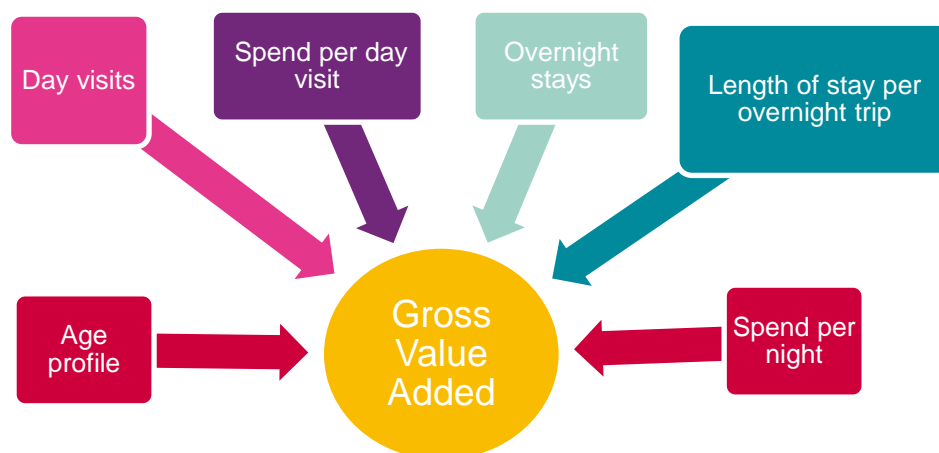
This Llandudno Regeneration Plan aims to limit negative environmental impact and will highlight:

- Reduction of traffic in the town.
- Utilise hydrogen and electric transport.
- Encourage active travel.
- Utilise solar energy to power buildings and operating uses.
- Recycle goods for community benefit.
- Use perishable goods for community benefit.
- Create job opportunities in the emerging energy and carbon reduction sectors.
- Promote greater consumption of local food and produce.
- Promote walking and cycling journeys and leisure activities.

4. Economic Impact Modelling

Based on the AECOM Tourism Analytical Review (2019), we created a simple tourism model to analyse the variables that may increase the future value of tourism to the local economy. The model uses six variables affecting the Gross Value Added (GVA) of tourism to the local economy, see figure below.

Figure 8: GVA of Tourism in Llandudno



The model uses three scenarios for its input assumptions:

- **On Target Scenario:** uses higher level AECOM numbers.
- **High Scenario:** uses a 10% stretch of AECOM’s higher level numbers.
- **Low Scenario:** uses lower level AECOM numbers.

The table below presents the modelling analysis and key factors that could enable the High Scenario to be realised.

Table 7: Modelling Analysis

2045 GVA (£m)				
Variable	On Target Scenario	High Scenario	Low Scenario	Enabling the High Scenario
Age profile	506	4	0	Provide more activities to attract families, older children, couples, adventurous older.
Day Visitors	506	27	-28	Provide more activities in indoor venues and during out-of-season
Spend per day visit	506	27	-23	Provide more activities to attract ABC1 Social Groups
Overnight visitors	506	23	-20	Provide better quality accommodation and food and drink offer
Spend per overnight visit	506	23	-20	Provide better quality accommodation and food and drink offer
Nights per overnight stay	506	70	-70	Improve the overall Llandudno experience and promote the town as a hub for wider North Wales tourism.
Total Impact	506	681	344	

LLANDUDNO SUPPLEMENTARY TECHNICAL REPORT

The On Target Scenario produced a GVA of **£506m** for 2045 and this became our baseline. We modelled the impact on the baseline (£506m GVA) of moving each variable to the high or low scenario. The modelling analysis found that by 2045, the cumulative impact of the **High Scenario** levered a GVA of **£681m**, compared to **£344m** GVA levered for the **Low Scenario**.

The priority area of focus to maximise potential GVA uplift and transition to the High Scenario is to **increase the number of nights per stay**. Other key areas of focus should be increasing day visitors and increasing spend per day

5. Stakeholder Engagement

5.1 Overview

Stakeholder engagement interviews were held with 67 stakeholders (see Section 7 Appendix A for a full schedule of stakeholders).

The interviews were semi-structured and focused on the key themes and the priority areas set by the Regeneration Board (e.g., the infrastructure connecting North and West Shore, the local events programme and Venue Cymru):

- Why is Llandudno successful?
- What type of visitors should Llandudno be seeking to attract?
- What is Llandudno for the people who live and work here?
- What is the focus for future business and investment?
- How should Llandudno evolve over the next 10 years?
- How can Venue Cymru be improved?
- What is the potential vision for Llandudno over the next 10 Years?

A community engagement event was organised in partnership with CCBC and held at Venue Cymru with 37 participants. This involved a set of exercises to test the regeneration principles and key priorities for delivering them, and to explore potential themed routes through Llandudno for a future route map. See Section 8 Appendix B for the slides presented at the community event.

We also reviewed further stakeholder engagement undertaken in the form of:

- Visitor surveys (2020 and 2021).
- Stakeholder priority-setting workshop (November 2021).

5.2 Feedback Summary

The feedback received from the stakeholder engagement is summarised below.

Why is Llandudno Successful?

- Traditional feel and environment.
- The promenade is unspoilt and refreshingly uncommercial.
- It has a unique and broad offer, with lots of differentiation.
- Old fashioned / relaxed atmosphere.
- Sympathetic changes have been introduced over the years.
- Appeals to all age groups.
- Clean and tidy.
- Busy, but does not feel overcrowded.
- A thriving retail offer, and a good range of commercial and public sector organisations in the town.

What type of visitors should Llandudno be seeking to attract?

There was a broad consensus on the need to attracting the following visitors:

- Age profile of 15 to 10 years younger than now (40+).

- Greater spending power.
- Overnight stayers.
- Stay longer for the day.
- Out of season.
- Businesspeople either visiting for work or using Llandudno as a good office base.
- More small business owners/visitors.

Some caution was expressed by some stakeholders about improving quality and increasing prices in order to attract high spending visitors. They suggested that Llandudno has attracted a broad group of visitors, and this should continue to be the case.

There was some uncertainty over whether the older generation, who arrive via package coach holidays, may decline over the next 10 years. Some thought there may be an increase in smaller special interest group visitors (perhaps requiring smaller coaches or minibuses).

There was also uncertainty of whether the traditional bed, breakfast and evening meal model offered by many hotels will decline, requiring an adaptation of the hotel to adapt their offer to become more of an independent restaurant and seeking to attract both residents and non-residents.

Some indicated that understanding the categories and mix of visitors is crucial in developing long term plans for the town. Each category of visitor has their own aspirations, challenges, each bring with them their own challenges, and they have varying levels of spending power.

Some stakeholders observed that the age profile is already getting younger and therefore modernising and improving the offering, and broadening the image to attract more families, younger couples will be important whilst retaining the visitors it already attracts.

What is Llandudno for the people who live and work here?

Some stakeholders mentioned that the town also has many residents who must be considered when changes are made.

The main issue that arose was the problems with car parking in the summer months. They believed measures were required to alleviate the number of cars seeking to park in the centre of the town during this relatively short period.

The seasonality for many business owners and residents who work in Llandudno is an issue and they would like to see more all year-round trade and stability of work.

There is also an issue with a shortage of affordable housing for local people. Many local people work in the town, and the current cost of living increases will be difficult to absorb. Yet, there is a shortage of affordable homes for local people. There have been examples of local housing being used or sold to the buy-to let or AirBnB market. This is contributing to the shortage of affordable homes. CCBC and the Welsh Assembly Government are reviewing potential policy interventions.

There is an opportunity to attract new people to the town as workers or small businesses operating all year round. The impact of Covid-19, where people can work and live anywhere is an opportunity for Llandudno. It has strong lifestyle factors, with good education and health facilities, and a very good leisure offer.

What is the focus for future business and investment?

Mostyn Estates have control over 80% of commercial properties in the town. They want to work with partners in developing and growing Llandudno further.

Feedback from the stakeholders included:

- There has been an influx in visitors since Covid. Llandudno has exceeded the expectations of those visitors in some areas but failed to deliver in others e.g., hospitality, food and drink, and contemporary, quality accommodation.
- Llandudno is introverted and not maximising its real estate. It has the capacity to deliver so much more and needs to think bigger and better.
- Need to showcase local food better – and shift the range and quality of food and drink slowly.
- Need to try and raise room rates and attract a higher spending market – “value over volume” –through raising the visitor offer (also linked to jobs, wages and retaining people.
- Need to capitalise on the green economy and position Llandudno as a hub for skills and jobs in this sector.
- Need to provide more for young people to keep them in the town as the future stewards and custodians of the town.
- Tackle the high business rates which is making it difficult for small businesses to be sustainable in the long term.

A further issue was raised that some of the hotels on the promenade constructed an outdoor gazebo on their front forecourts during the pandemic. These were successful and offered an example of a continental culture with daytime and evening café bars with outdoor service and having sea views.

The better hotels will adapt to a changing market once they have the vision. They are currently not currently well suited to an age profile that is 5 to 10 years younger than now.

Many hotels and shops / cafes are family owned and are managed by a small number of people. They do not want to open for longer in the evening.

How should Llandudno evolve as a resort over the next 10 years?

Raising the quality of various aspects of the town was mentioned frequently. The key areas where quality improvements are believed to be required are listed below and explored in turn:

- Food and drink offer.
- Introducing a continental culture.
- Shop frontages/signage.
- Town connectivity through public realm and lighting.
- Indoor attractions.
- Areas of the town that have low footfall.
- Venue Cymru.

LLANDUDNO SUPPLEMENTARY TECHNICAL REPORT

Food and Drink Offer

Almost all stakeholders mentioned the food and drink offer as a key issue. Most thought Llandudno should be a great place to enjoy local food and drink, and this is not currently the case.

Some thought a quality restaurant overlooking the sea would be a welcome development. It was felt that raising standards of food and drinks establishments to appeal to higher spending visitors and increase dwell time would play to Llandudno's strengths.

Most people thought that raising prices commensurate to the quality increase would be welcome. The additional income could be used to create a better skilled workforce in the hospitality sector. It would also ensure more local people will be attracted to working there and more likely to stay to develop their careers in that sector over the longer term.

The former M&S building in the town was cited as a good potential location for a new modern facility, food and drink establishment, events space. The Tabernacle Chapel was also identified as a possible location.

Continental Culture

A few people mentioned the benefits of introducing a continental culture to attract higher spending visitors, increase dwell time and perhaps encourage more people to want to stay overnight. Hotels on the front introduced gazebos during the pandemic, which brought a continental culture.

Shop frontages/signage

Some shops in the town had poorly maintained shop fronts which did not reflect higher quality.

Town connectivity through public realm and lighting

High quality public realm and/or lighting improvements could be used to link and integrate four areas of the town which are currently disconnected, specifically:

- West Shore to North Shore.
- East to West (from Dylan's restaurant to the pier).
- The Great Orme/Happy Valley to the Town.
- The High Street to the two retail parks which are within walking distance.

Indoor Attractions

Llandudno needs more indoor attractions to entertain people during wet weather, encouraging people to extend their stay and contribute to all year-round operations.

The Prince Leisure Group own Llandudno Pier and many resort attractions across the North Wales Coast. They have recently purchased the former pier pavilion site and have significant plans to invest in a new entertainment complex on the site. They felt this new indoor facility would be a potential "game changer" and have assessed that this facility would create two hours a day extra time visitors will spend in the town. It could also help with accommodating younger people.

Areas of the town with a low footfall

Area adjacent to Bodafon Fields: This is used for occasional events. However, the infrastructure (e.g., electrical supply and toilets) for such events needed to be installed each time an event took place. This was expensive and time consuming, preventing

many events from happening. It was also prone to flooding. It was mentioned that a funding bid should be submitted to install a permanent electrical supply, toilet, and drainage infrastructure on the fields. This would allow more (and lower cost) cultural, community and other events to be held in the location throughout the year. Bodafon fields would make a great location for a park and ride (with a land train to the centre) in the 6-week summer holiday peak. Increasing activity at this location, perhaps as a dual park and ride and event occasion would also bring much needed footfall to this part of town, benefitting Venue Cymru and the café.

Gloddaeth Street: There was a common view that Gloddaeth Street needs improving. It does not link the West Shore and the town well in terms of public realm and lighting, yet it is a wide boulevard that has significant potential. There was a view that creating green infrastructure space for walking and cycling (and perhaps with a cultural focus) in the central reservation for cultural activities and events would help to realise the potential of this area. Some individuals also thought that alternative car parking arrangements would need to be considered as the central reservation is currently used for that purpose.

The West Shore: The West Shore fails to take advantage of the water, which has significant outdoor activity potential. This would increase visitors to the area appropriate to the environment without bringing in mass tourists. The West Shore would be well suited to water sports. It was suggested perhaps some changing and shower facilities would support greater use of the water by surfers. Several people felt that the West Shore could also be better connected to the town.

The Summit Complex Visitor Centre: The summit complex car park is often very busy in the summer months, but quiet on wet days and in the off-season. It was felt by many consultees that the summit complex visitor centre was poor and not conducive to attracting people to visit it either on a wet day or outside the peak season. The food and drink offer were also poor.

How can Venue Cymru be improved?

There was widespread recognition that the venue is a successful venue, hosting circa 700 events per year and with strong acts with good visitor appeal. Consultees believed that the venue is a key enabler for the town, bringing people who stay, driving overnight bed space and attracting notable organisations to host conferences.

It plays an important role in supporting the rest of the Llandudno economy. However stakeholders felt that it is austere and functional, with a lack of ambience and sense of place. Venue Cymru attracts medium sized business events. It should have a much better food offer.

What is the potential vision for Llandudno over the next 10 Years?

To gradually move towards:

- A Premium Resort on the Beautiful North Wales Riviera.
- A “continental, look and feel”, with an upgraded product and a more sophisticated distinctive customer experience.
- Attract visitors with greater spending power.
- Raising the quality of various aspects of the town.

The quality enhancements may be initiated and led by CCBC and key stakeholders, by both promoting the vision and through example, with the aim of the market responding to that vision, e.g., hotels, cafes, pubs, restaurants, shops.

Llandudno has built its success on attracting a broad group of visitors and this should continue to be the case. Llandudno's success is built on the current cohort of mainly older visitors/couples etc visiting the town, and spending. Changing that mix will have an economic impact.

Modelling suggests if you attract more families and fewer older people/couples the overall spend drops, and this can affect the high street. The aim therefore must be to maintain current levels of high spending visitors as well as blending this with increasing younger visitors and families.

Confidence to increase pricing commensurate with a premium resort (hotel rates/ food and drink/ tourist tax/congestion levy/pre-booked park and ride or parking).

High quality shop frontages, signage, greening, public realm and lighting throughout the more visually unattractive areas of the town (e.g., Mostyn Street High Street to the two retail parks which are within walking distance/ Upper Mostyn Street and West Shore).

Taking these steps will enable Llandudno to develop into:

- A place where there is a defined transition offer between afternoon and evening attractions for visitors
- A place which has effective traffic management in the summer months for the benefit of residents and visitors alike.
- A place where local people can be enabled to secure specialist, skilled and lower skilled jobs on major projects in the area.
- A place where people on lower pay levels can be well supported during times of significant cost of living increases.

6. Emerging Project Ideas

6.1 Overview

The stakeholder interviews provided suggested project ideas, which have been developed, refined, and explored further through our own research. They form the basis of the set of proposed interventions in the Visioning Document and Delivery Plan. A selection of these key emerging project ideas is summarised below.

6.2 Education Provision

There are many job opportunities emerging in North Wales (Hydrogen production, tidal energy, nuclear). Over the next 10 years these will require a mixture of specialised, skilled, and lower skilled positions. In addition, the planned growth of the premium hospitality sector in Llandudno will require a well-trained (and commensurately better paid) workforce.

There may be merit in exploring a new Llandudno based college campus in partnership with Llandrillo College. This may be either a new build or re-purposed building in the town and may offer both technical and hospitality course provision. This would assist young people into securing stronger and better paid jobs, with the local base assisting those who live in the more deprived areas of Llandudno.

6.3 New Town Centre Venue: High Quality Market Hall

This is envisaged to be high quality multi use indoor facility in the town centre. It may take the form of part restaurant/café, part farmers market hall/ community use/ part town square located in the town centre (e.g., the vacant former Marks & Spencer building).

With extensive space to operate in the market hall can also provide a great indoor location for both Llandudno community and visitor events. A new refreshed market can harness community-based businesses. A reinvigorated market can also provide a great platform to enable local business to recover from the economic impact of Covid-19 and support the creation of new small businesses.

6.4 Happy Valley: Restaurant

The view from Happy Valley overlooking the sea is spectacular and could be better harnessed. We envisage this to be a glazed fronted, attractive, perhaps wooden cabin construction restaurant at Happy Valley, overlooking the sea. A potential location would be the rear of Happy Valley Theatre, with a glazed frontage. The restaurant will position Llandudno as a premium resort offering a high-end product and customer experience.

6.5 Happy Valley: Pedestrian Prioritised Colonnade.

This is already in development and an improvement to this part of the town will enhance the visitor experience and create an attractive walking facility to Happy Valley. Work will be undertaken to improve the appearance and historically pedestrian friendly nature of the colonnade and better reflect its historic origins as a visitor entrance to Happy Valley. High quality public realm and lighting will act as an attractive link between the town and Great Orme.

6.6 Great Orme Visitor Centre: Glazed Panoramic Building

Mace understands that improvements to the summit complex visitor centre is already being considered by the Council. We believe a 360 degree glazed panoramic building would be a spectacular and unique addition to Llandudno.

Together with a high-quality accompanying high-quality offer (viewing area/restaurant café/ shop/ bar) such a building has the potential to position Llandudno as a premium resort offering a unique and high-quality customer experience. The design principle is based on the types of buildings seen in a ski resort. This style of building would complement Llandudno's toboggan run and ski slope. It also has the potential to attract visitors out of season or extend the duration of people's stay.

6.7 Bodafon Fields

Bodafon fields are the location of some events throughout the year. A problem with the current infrastructure is that the event organisers must install each time electrical and plumbing connections and associated pipework. The fields are also subject to flooding.

Mace believe that a funding bid should be submitted to install a permanent electrical, toilet and drainage infrastructure on the fields. This would allow more (and lower cost) cultural, community and other events to be held in the location throughout the year. Such events may also attract visitors out of season or extend the duration of peoples stay.

6.8 Park and Ride

There is a consensus that Llandudno needs a new parking facility to alleviate traffic congestion in the summer months. The location has yet to be determined. However, we would suggest a feasibility study is conducted to use the Bodafon field in the summer months. With adequate drainage installed. This would be an excellent location for a pre bookable park and ride facility due to its size and proximity to the centre of the resort. We also believe a pleasant holiday resort feature of the park and ride (and attraction in its own right) could be a wheeled train to a location close to the pier. The land is likely to require the installation of a drainage system which may be the source of a funding bid, although the park and ride facility will be a feature paid for by users.

6.9 West Shore Water Activities Infrastructure

There is the opportunity to develop infrastructure around sea activities at West Shore, board hire, showers/changing areas etc. The aim would be to attract non-motorised water sports users to use the two beaches. This area may also be used for several non-motorised water sports events throughout the year when conditions are suitable. At low tide the water sports area will be at some distance from the shore.

6.10 Gloddaeth Street Car Parking

The proposed improvement of the central boulevard at Gloddaeth Street would have the effect of preventing cars from parking in the central reservation. The ground level car parks at Gloddaeth Street are located below road level. This creates the potential for a double deck system that will not look unsightly. Furthermore, its external appearance could be improved by the use of green planted areas of local works of art. Such a double deck solution would provide parking for additional cars, which would mitigate the impact of cars no longer being able to park in the central reservation.

6.11 Live Messaging

Mace understands that improvements to the messaging system is already being considered by the Council. We believe that better messaging will attract more visitors to specific locations or events (e.g., tram, cable car, summit complex building). Such a messaging system may be a good source for a funding bid as it will help to better promote cultural events in the town.

7. Appendix A: Stakeholder Engagement

We engaged with the following stakeholders to develop the Regeneration Plan:

Conwy County Borough Council (12)

- Amanda Ballance, Conwy County Borough Council
- Antony Bertola, Conwy County Borough Council
- Jodie Davies, Conwy County Borough Council
- Sara Ecob, Conwy County Borough Council
- Elen Edwards, Conwy County Borough Council
- Helen Goddard, Conwy County Borough Council
- James Harland, Conwy County Borough Council
- David Hawkins, Conwy County Borough Council
- Helen Jackson, Conwy County Borough Council
- Dylan Jones, Conwy County Borough Council
- Jasmin Koffler, Conwy County Borough Council
- Andrew Saunders, Conwy County Borough Council
- Caroline Tabberer, Conwy County Borough Council

Conwy County Borough Council Councillors (4)

- Cllr Frank Bradfield, Conwy County Borough Council
- Cllr Louise Emery, Conwy County Borough Council
- Cllr Pat Hebron, Conwy County Borough Council
- Cllr O'Grady, Conwy County Borough Council

Llandudno Town Council Councillors (17)

- Cllr Dr R Atenstaedt, Llandudno Town Council
- Cllrs C Beard, Llandudno Town Council
- Cllr A W Bertola, Llandudno Town Council
- Cllr F Bradfield, Llandudno Town Council
- Cllr T Brain, Vice-Chairman, Llandudno Town Council
- Cllr D J Hawkins, Llandudno Town Council
- Cllr Miss L Lloyd-Pepperell, Llandudno Town Council
- Cllr Miss C Marubbi, Llandudno Town Council
- Cllr D Milne, Llandudno Town Council
- Cllr T Montgomery, Llandudno Town Council
- Cllr Mrs A Mullineux, Llandudno Town Council
- Cllr Miss A O'Grady, Llandudno Town Council
- Cllr M A Pearce, Llandudno Town Council
- Cllr G Robbins, Llandudno Town Council
- Cllr H T M Saville, Chairman, Llandudno Town Council
- Cllr G Sweeny, Llandudno Town Council
- Cllr I Turner, Llandudno Town Council

Public Sector and Representative Organisations (8)

- Louise Carswell, Grwp Llandrillo Menai - Llandrillo College
- Berin Jones, Chairman Llandudno Hospitality Association
- Graham Jones, Coleg Llandrillo
- Jim Jones, North Wales Tourism
- Lawrence Manley, Visit Wales
- Maria McLean, Rydal Penrhos School
- Nigel Treacy, Destination Conwy
- Angharad Owen, Destination Conwy

Private Sector Organisations (26)

- Matt Bell, One Day Ltd
- Alex Davies, Lichfield's
- Liam Donnelly, H&M Belmont Ltd
- Matthew Evans, Na
- Gareth Ffowcs-Williams, We Cycle
- Clare Harding, MOSTYN
- Stuart Haynes, SPH Accounting Services
- Edward Hiller, Mostyn Estates
- Claire McElroy, Clares of Llandudno
- Jon Merrick, Mostyn Estates.
- Jason Millband, Codman's Punch & Judy
- Shaun Oldfield, Quay Hotel & Spa
- Christopher Owens, Alpine Travel
- Dafydd Pesic-Smith, Penderyn Wales
- Neil Peterson, One Day Ltd
- Matt Roche, Director, One Day
- David Roberts, Cater Veterinary Practice
- Marc Roberts, Cynlas Cyf
- Colin Robertson, Lichfield's
- Darren Russell, Director
- Richard Scamans, Hafan y Mor Guesthouse
- Emma-Jane Sutcliffe, Owner, Llandudno Climbing Centre
- Adam Williams, The Prince Leisure Group.
- Chris Williams, HTC Entertainment and events
- Rhys Williams Dunoon Hotels Ltd
- Tim Winstanley, Pendragon Drinks Ltd

LLANDUDNO SUPPLEMENTARY TECHNICAL REPORT

Mace

155 Moorgate
London EC2M 6XB

T +44 (0) 20 3522 3000