

**Gwynedd Council
and
The Isle of Anglesey County Council
Joint Local Development Plan**



**Gwynedd and Anglesey Retail Study
Volume 2: Local Centres
February 2013**

CONTENTS

1	INTRODUCTION	2
2	GENERAL	3
3	ABERSOCH.....	8
4	AMLWCH.....	11
5	BARMOUTH (ABERMAW).....	14
6	BEAUMARIS.....	17
7	BENLLECH.....	20
8	BETHESDA	22
9	BLAENAU FFESTINIOG	25
10	CEMAES.....	28
11	CRICCIETH.....	30
12	GAERWEN.....	32
13	LLANBERIS	34
14	LLANFAIRPWLL	37
15	MENAI BRIDGE	40
16	NEFYN.....	42
17	PENRHYNDEUDRAETH.....	44
18	PENYGROES.....	47
19	RHOSNEIGR	49
20	TYWYN.....	51
21	VALLEY.....	53
22	OTHER CENTRES.....	55

Applied Town Planning Limited

1Victoria Square

Birmingham

B1 1BD

T: 0121 632 2088

E: info@appliedtownplanning.com

W: www.appliedtownplanning.com

1 INTRODUCTION

1.1 This Study has been commissioned by Gwynedd Council and Anglesey County Council to form part of the evidence base underpinning the Joint Local Development Plan being prepared by the Councils. The Plan excludes those areas within the Snowdonia National Park but this Study will have regard to the wider area which depends on the centres within the Plan Area for some of its retailing needs and centres outside the Plan Area which attract spending from the Plan Area.

1.2 The Study analyses existing expenditure flows for various goods type to stores and centres within and beyond the Study Area and surveys each significant centre to ascertain how well each meets these demands within the region's retail hierarchy. The need for additional floorspace requirements to meet this demand is quantified throughout the plan period up to 2026.

1.3 The Study is arranged as follows:

Volume 1

- A review of existing national and local retail policies;
- A review of previous studies;
- An explanation of the study methodology;
- Health assessments of the six major centres; Bangor, Holyhead, Caernarfon, Pwllheli, Porthmadog and Llangefni; and
- Need assessments for both comparison and convenience goods for the major centres.

Volume 2

- An assessment of Local Centres; and

Volume 3

- Policy proposals.

Volume 4

- Technical appendices

Executive Summary (bilingual)

2 GENERAL

- 2.1** The role of Local Centres is to provide essential services to the local community and the immediate surrounding area. Convenience retailing and services such as chemists, hairdressers, post offices and banks play a more important role in Local Centres with the higher order centres providing for most comparison shopping requirements.
- 2.2** Based on our experience we would expect the Local Centres to achieve much lower trading densities than the larger centres, typically around £6,000 sq.m. for convenience stores and around £3,000 sq.m. for comparison shops which are much more variable in performance.
- 2.3** The accuracy of quantitative retail modelling is less reliable in smaller centres where relatively small variations in any of the parameters can result in a significant fluctuation in the results. Nevertheless an assessment of turnover derived from the results of the household survey, together with an allowance for expenditure derived from tourism compared with available floorspace, provides an overview of the relative strength of centres. This is explained in section 3 of Volume 1 of this Study.
- 2.4** The following table shows the resident derived turnover based on the Household survey for comparison and convenience goods and shows trade from residents as well as expenditure derived from tourism. The methodology underpinning this assessment is fully explained in Volume 1 of the Study.

Table 1: Local Centres Comparison and Convenience Turnover

	Comparison				Convenience			
	Resident £m	Tourism £m	Floorspace Net Sq.M.	Trading Density £/Sq.M.	Resident £m	Tourism £m	Floorspace Net Sq.M.	Trading Density £/Sq.M.
Abersoch	0.22	1.57	1,048	1,715	0.44	0.27	106	6,698
Amlwch	1.92	1.08	1,083	2,770	4.39	1.54	904	6,555
Barmouth	3.91	4.12	3,408	2,358	6.25	2.87	1,333	6,838
Beaumaris	1.65	1.56	1,040	3,086	1.44	1.04	407	6,087
Benllech	0.86	0.57	474	3,031	2.91	0.83	388	9,643
Bethesda	0.77	0.41	583	2,015	2.24	0.67	477	6,101
Blaenau Ffestiniog	2.77	1.19	1,706	2,322	4.10	1.72	1,226	4,743
Cemaes	0.70	0.43	357	3,165	0.59	0.25	116	7,264
Criccieth	1.78	1.46	973	3,326	1.64	0.84	329	7,544
Gaerwen	1.90	0.27	392	5,546	0.46	0.13	92	6,386
Llanberis	1.09	1.49	992	2,595	1.25	0.92	362	6,005
Llanfairpwll	3.10	1.97	1,626	3,115	5.38	2.40	1,117	6,966
Menai Bridge	2.11	1.96	1,309	3,111	6.67	3.16	1,239	7,934
Nefyn	0.99	0.09	128	8,443	1.97	0.51	364	6,810
Penrhyndeudraeth	0.95	0.37	529	2,487	1.64	0.26	189	10,081
Penygroes	1.24	0.51	731	2,395	2.48	0.45	320	9,147
Rhosneigr	0.02	0.34	280	1,295	0.27	0.40	188	3,600
Tywyn	3.75	2.53	2,091	3,001	9.13	3.58	1,663	7,639
Valley	1.86	0.55	781	3,077	1.56	0.60	426	5,063
TOTAL	31.57	22.49	19,531	2,768	54.81	22.43	11,246	6,868

Table 2: Total Floorspace and Tourism

	Total			
	Turnover £m	Tourism £m	Floorspace Sq.M.	% Tourism
Abersoch	2.51	1.84	1,154	73.49
Amlwch	8.93	2.62	1,987	29.35
Barmouth	17.15	6.99	4,741	40.76
Beaumaris	5.69	2.60	1,447	45.68
Benllech	5.18	1.41	862	27.19
Bethesda	4.09	1.08	1,060	26.34
Blaenau Ffestiniog	9.78	2.91	2,932	29.77
Cemaes	1.97	0.68	473	34.55
Criccieth	5.72	2.30	1,302	40.20
Gaerwen	2.76	0.40	484	14.60
Llanberis	4.75	2.41	1,354	50.77
Llanfairpwll	12.85	4.37	2,743	34.01
Menai Bridge	13.90	5.12	2,548	36.85
Nefyn	3.56	0.60	492	16.83
Penrhyndeudraeth	3.22	0.63	718	19.71
Penygroes	4.68	0.96	1,051	20.52
Rhosneigr	1.04	0.74	468	71.49
Tywyn	18.98	6.11	3,754	32.17

- 2.5** High trading densities, particularly for convenience trade, could be an indicator that there may be a deficiency in the amount of floorspace in that centre. Nevertheless, given the relatively small amounts of turnover involved in these smaller centres, it is highly unlikely that sufficient surplus demand over supply alone would justify a new convenience store of any significant size.

Vacant Properties

- 2.6** The results in Tables 1 and 2 are based on floorspace in use. In considering the health of a centre and potential for additional floorspace it is also important to consider the amount of vacant retail floorspace. For this reason we have aggregated both convenience and comparison expenditure and taking both predicted tourism (as explained in Volume 1 of this Study) and vacant properties have calculated the turnover per sq.m. of the combined retail floorspace in the centres which, whilst requiring some qualification with regards to centres such as Rhosneigr, Gaerwen, Nefyn and Benllech, gives a basic indicator of retail health. The results of this are shown in Table 3.

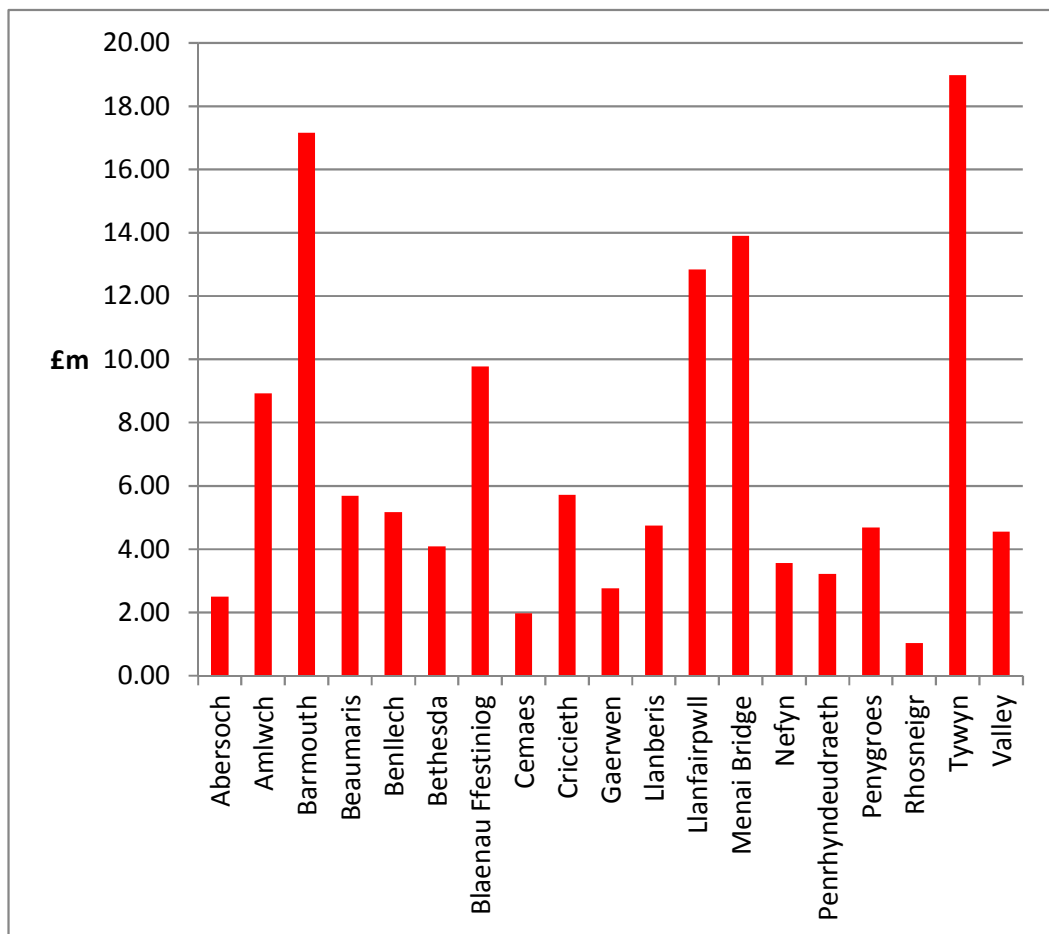
Table 3: Local Centres Overall Trading Densities including Vacant Properties

	Turnover £m	Floorspace Sq.M.	Vacant Floorspace Sq.M.	Total Floorspace Sq.M.	Overall Trading Density
Abersoch	2.51	1,154	0	1,154	2,172
Amlwch	8.93	1,987	348.6	2,336	3,822
Barmouth	17.15	4,741	582.4	5,323	3,222
Beaumaris	5.69	1,447	0	1,447	3,930
Benllech	5.18	862	219.1	1,081	4,790
Bethesda	4.09	1,060	1260	2,320	1,761
Blaenau Ffestiniog	9.78	2,932	758.8	3,691	2,649
Cemaes	1.97	473	166.6	640	3,084
Criccieth	5.72	1,302	213.5	1,516	3,773
Gaerwen	2.76	484	0	484	5,706
Llanberis	4.75	1,354	158.9	1,513	3,139
Llanfairpwll	12.85	2,743	0	2,743	4,683
Menai Bridge	13.90	2,548	56	2,604	5,339
Nefyn	3.56	492	242.9	735	4,844
Penrhyndeudraeth	3.22	718	75.6	794	4,059
Penygroes	4.68	1,051	409.5	1,461	3,203
Rhosneigr	1.04	468	0	468	2,221
Tywyn	18.98	3,754	516	4,270	4,445
Valley	4.56	1,207	93.8	1,301	3,506
TOTAL	131.30	30,777	5,102	35,879	3,659

- 2.7** It can be seen that some centres contain no vacant floorspace whilst others, notably Bethesda, Cemaes, Nefyn and Penygroes have relatively high levels.

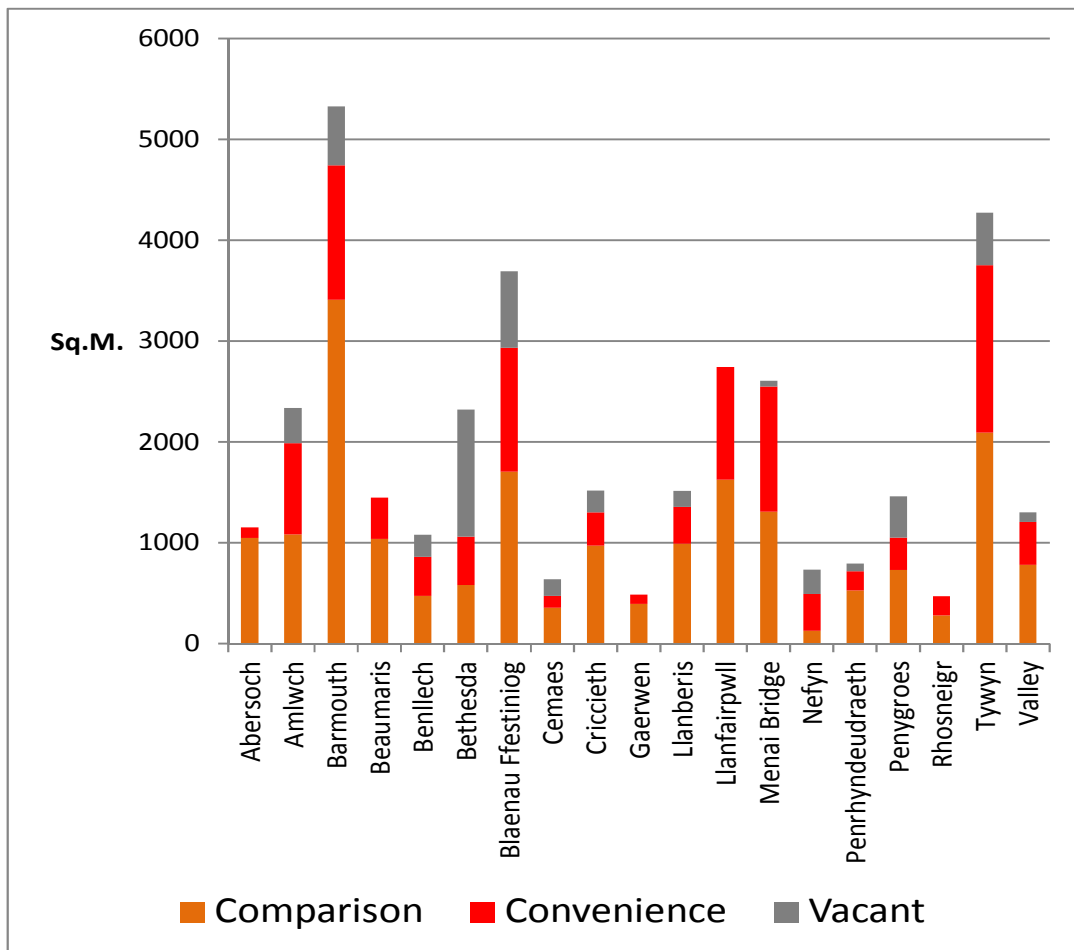
2.8 Chart 1 shows the overall turnover of each Local Centre which gives an overall indication of the relative importance of each centre for retailing. It can be seen from this that Barmouth, Llanfairpwll, Menai Bridge and Tywyn all have turnovers in excess of £10m. Barmouth and Tywyn are relatively isolated from other centres and serve large rural hinterlands. Menai Bridge and Llanfairpwll are near to main population centres in particular Bangor and are highly accessible by the road network. At the other end of the scale, Abersoch, Bethesda, Cemaes, Gaerwen Nefyn, Penrhyndeudraeth and Rhosneigr have limited facilities attracting less than £4m of expenditure and play a lesser role in the retail hierarchy.

Chart 1: Local Centres Total Turnover 2012



2.9 Chart 2 shows the size of each centre by floorspace broken down by comparison and convenience uses along with vacant properties. Again, as may be expected, Barmouth, Llanfairpwll, Menai Bridge and Tywyn are amongst the largest centres. The relatively large amounts of available vacant floorspace in Bethesda and Blaenau Ffestiniog is indicative of the declining importance of these centres.


Chart 2: Local Centres Floorspace Distribution



2.10 Due to the limitations of quantitative analysis at this scale, qualitative assessment can be more important when considering the health of Local Centres. The individual retail structure maps are useful in that they give an impression of the overall form of the centre and the relative importance of other businesses such as restaurants, bars, take aways, banks and services such as hairdressers to the function of the centre. Those with a strong focus are more likely to be successful as retail and service centres rather than those where the pattern of businesses is more fragmented and dispersed.

3 ABERSOCH

Summary	
Study Zone	10
Population (2001)	Approx 1,000
Comparison Floorspace (Net Sq.m.)	1,048
Convenience Floorspace (Net Sq.m.)	106
Comparison Turnover £m	1.8
Convenience Turnover £m	0.71
Percent of Turnover from Tourism	73.49
No. Comparison Shops	27
No. Convenience Shops	2
No. Vacant Units	0
Nearest Major Centre	Pwllheli: 7 miles



- 3.1** Abersoch is a relatively small but busy centre. Most of the shops reflect its role as a major tourist destination primarily based on watersports and beach holidays with extensive caravan and chalet developments in the vicinity of the village. We also understand that many houses are 'second homes' which will reduce the amount of floorspace that can be supported by the resident population. The attraction of the village is its coastline setting rather than the quality of its architecture or layout.

Photo 1: Stryd Penlan, Abersoch

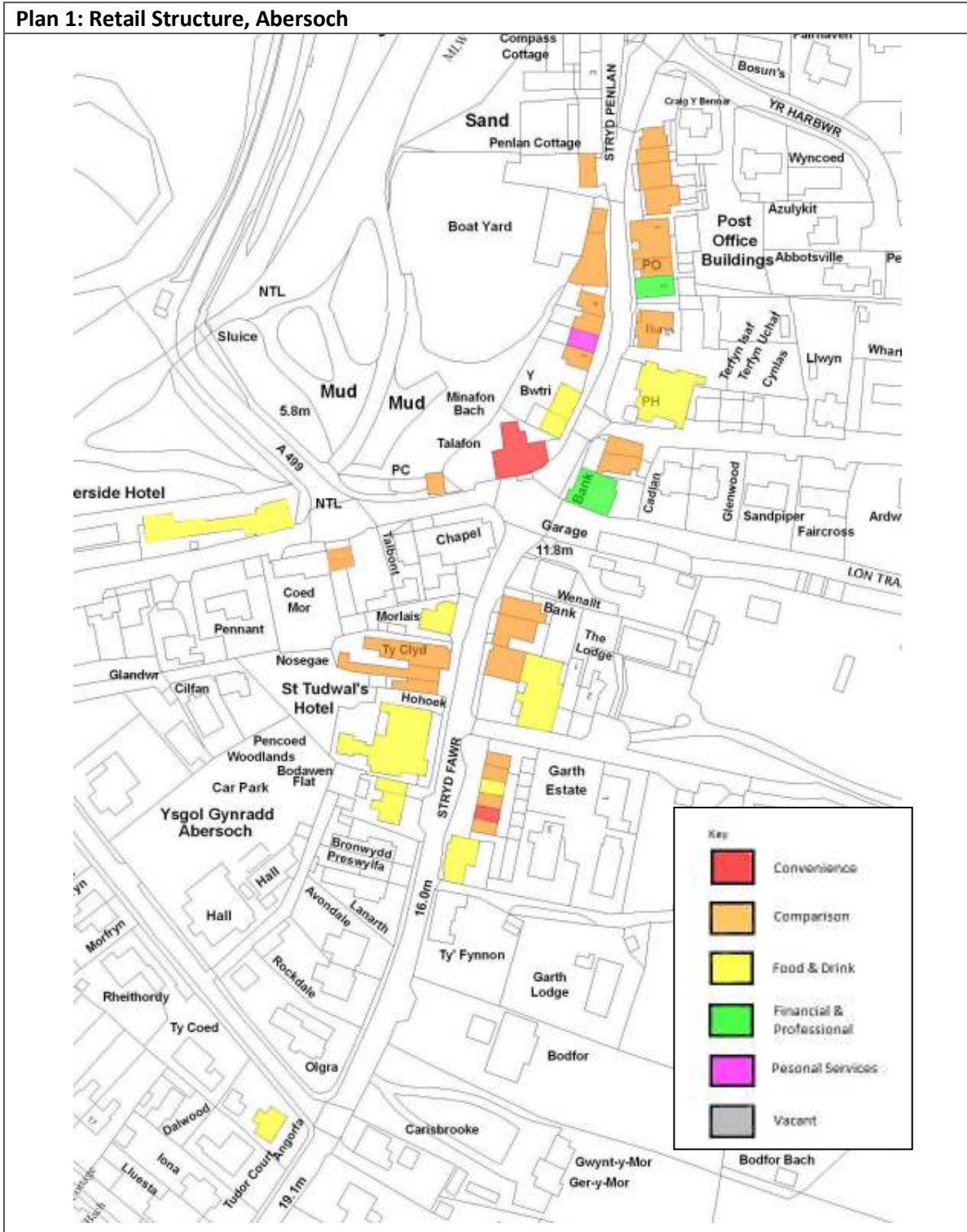


- 3.2** Non-tourist facilities for residents are limited and main convenience and comparison shopping is met by Pwllheli which is approximately seven miles to the east. Convenience shopping is essentially limited to a Spar convenience store whilst 'surf-shacks' dominate the comparison market with bars and restaurants accounting for much of the remainder of commercial floorspace. Car parking is limited and in short supply during peak season when traffic congestion can also to be a problem. There are bus services to Pwllheli and surrounding area.

Conclusion

- 3.3** Given its role primarily as a tourist resort and lack of vacant units Abersoch's retail offer could be described as healthy. However convenience retailing, particularly for residents, is limited but with restricted available spending to support additional facilities this is unlikely to change and alone does not warrant the allocation of additional retail floorspace. Lack of car parking and congestion detract from the quality of the centre.

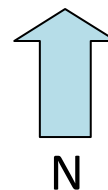
Plan 1: Retail Structure, Abersoch



Not to Scale


Source: Applied Planning survey, June 2012

© Crown copyright and database rights 2012 Ordnance Survey 100023387



4 AMLWCH

Summary	
Study Zone	1
Population (2001)	3,438
Comparison Floorspace (Net Sq.m.)	1,083
Convenience Floorspace (Net Sq.m.)	904
Comparison Turnover £m	3.0
Convenience Turnover £m	5.93
Percent of Turnover from Tourism	29.35
No. Comparison Shops	20
No. Convenience Shops	4
No. Vacant Units	7
Nearest Major Centre (miles)	Holyhead: 20 Llangefni: 24 Bangor: 19



- 4.1** Amlwch is a small town on the north Anglesey coast and is the largest centre in Study Zone 1 which also includes Cemaes. The household survey shows that Zone 1 only retains 9.35% of comparison spending with 62.66% 'leaking' to Bangor, 8.87% to Holyhead (including out-of-centre stores) and 8.69% to Llandudno. Zone 1 retains £5.46m of resident's convenience expenditure (£4.13m to Amlwch) with £4.43m being attracted to Holyhead, £3.35m to Llangefni and £2.75m to Bangor mainly to the large format supermarkets attracting bulk purchase trips. The town attracts a significant amount of tourist expenditure.
- 4.2** The settlement is quite scattered in form extending along the principal road into small clusters of development, mainly modern estates. Shopping is largely concentrated on Queen Street. The town has a good variety of shops as well as local services such as hairdressers and banks. Convenience shopping is catered for by a greengrocer and a butcher with a large Co-operative and a Spar, both slightly divorced from the rest of the shopping on Lon Goch. There is also a weekly market which sells fruit and vegetables and other products.
- 4.3** Our survey indicates that approximately 15% of retail floorspace is vacant which, in the current climate, is not excessively high and the town achieves a satisfactory overall trading density of £3,822 sq.m.
- 4.4** There are bus services to Holyhead, Llangefni, Bangor and surrounding villages and there is adequate public car parking either on-street, at the convenience stores or on the small public car parks.

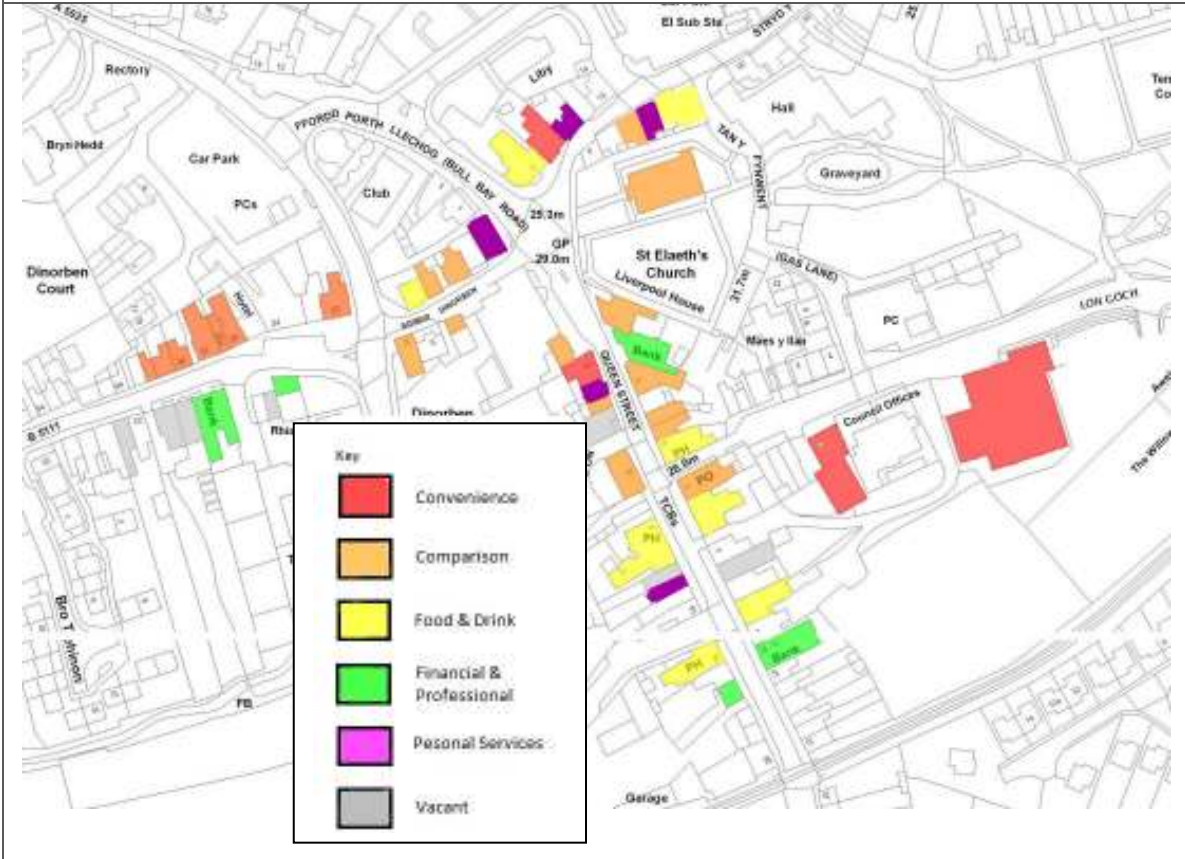
Photo 2: Queen Street Amlwch



Conclusion

- 4.5 The retail facilities in Amlwch provide a good level of service to the inhabitants of the village and the sizeable surrounding catchment area. The town's shops could benefit from the construction of the new power station at Wylfa but the scale of this additional turnover would not be sufficient to justify the allocation of additional retail floorspace.

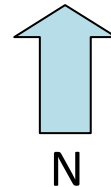
Plan 2: Retail Structure, Amlwch



Not to Scale


Source: Applied Planning survey, June 2012

© Crown copyright and database rights 2012 Ordnance Survey 100023387



5 BARMOUTH (ABERMAW)

Summary	
Study Zone	14
Population (2001)	2,230
Comparison Floorspace (Net Sq.m.)	3,408
Convenience Floorspace (Net Sq.m.)	1,333
Comparison Turnover £m	8.03
Convenience Turnover £m	9.12
Percent of Turnover from Tourism	40.76
No. Comparison Shops	58
No. Convenience Shops	3
No. Vacant Units	12
Nearest Major Centre (miles)	Porthmadog: 20 Machynlleth: 24



- 5.1** Barmouth is a seaside tourist centre in the south of Gwynedd surrounded by the Snowdonia National Park. It is the largest of the Local Centres having a total net retail floorspace of approximately 5,323 sq.m. comprising 25% convenience floorspace, 64% comparison with vacant properties making up 11%.
- 5.2** Barmouth is in Household survey Zone 14 along with Dolgellau. This zone retains relatively high levels of available expenditure due to the distance to higher order centres. Barmouth accounts for £5.92m of resident's convenience spend from Zone 14 compared to Dolgellau's £7.29m with Porthmadog accounting for £0.82m. Retained comparison resident spend of £7.48m is split evenly between the two centres. £2.77m is drawn to Bangor and £3.42m to Wrexham although we would expect this to be drawn from the eastern part of the Zone rather than Barmouth which is 60 miles away from Wrexham.
- 5.3** It has a well defined, essentially linear town centre between the railway line and coast to the west and high ground to the east. In the household survey the Co-op, Iceland, Spar, Rowlands (Chemist) and Perrys (Jewellers) were the named retail destinations. The town centre contains a significant number of cafes, take-aways and public houses reflecting the importance of tourist trade. Markets are held every Thursday throughout the year and most Sundays and Bank Holiday Mondays during holiday periods which attract tourists and residents.
- 5.4** The town contains many attractive imposing stone built buildings of up to four storeys although some other buildings are in a poor state of repair and the overall environment is tired. Traffic congestion detracts from the quality of the centre and there is little available public space for additional street furniture and planting.

- 5.5 There are large areas of public car parking along the promenade within easy walking distance of the shops. The availability of parking is probably limited during peak tourist season. There are train services to Pwllheli and Machynlleth via Tywyn, with connections to Aberystwyth and Shrewsbury and frequent bus services to Harlech, Blaenau Ffestiniog, Dolgellau, Bala and Wrexham.

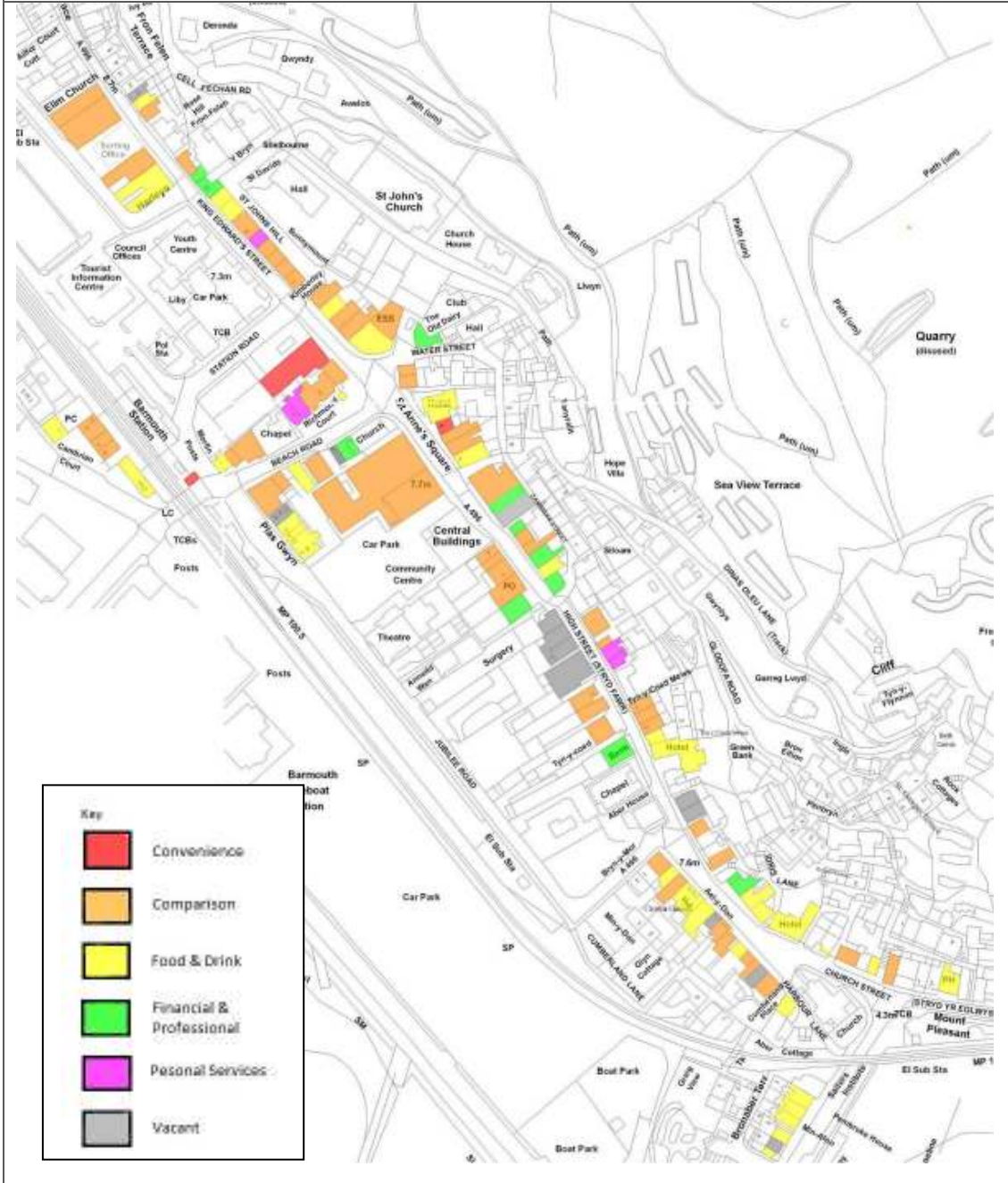
Photo 3: High Street, Barmouth (from Google Earth)



Conclusion

- 5.6 The town appears to be busy and has a reasonable choice of both convenience and comparison shops for a centre of this size. Vacant floorspace amounts to 11% of the total stock which is not unduly high but is concentrated in the central part of High Street which detracts to some degree from the overall vitality of the centre. It would be desirable to improve the centre through renovation and small scale redevelopment but we see no reason to allocate additional floorspace.

Plan 3: Retail Structure, Barmouth



6 BEAUMARIS

Summary	
Study Zone	3
Population (2001)	2,040
Comparison Floorspace (Net Sq.m.)	1,040
Convenience Floorspace (Net Sq.m.)	407
Comparison Turnover £m	3.21
Convenience Turnover £m	2.48
Percent of Turnover from Tourism	45.68
No. Comparison Shops	24
No. Convenience Shops	5
No. Vacant Units	4
Nearest Major Centre (miles)	Bangor: 10 Llangefni: 11



- 6.1** Beaumaris is a very attractive small town at the eastern entrance to the Menai Strait. Data contained in Volume 1 of the Study shows that the town is in an area with a high proportion of residents in higher earning groups.
- 6.2** The town is dominated by Beaumaris Castle at the eastern end of Castle Street which along with its extension, Bulkerley Terrace and Church Street, contain the town's shops. The town centre contains a variety of period buildings resulting in an appealing shopping environment compromised by the amount of traffic passing through the centre. The shopping pattern is broken by hotels, the town hall and some residential properties particularly at the southern end of Bulkerley Terrace.
- 6.3** The household survey indicates that comparison resident expenditure is modest and this is reflected in the composition of businesses which are dominated by bars, restaurants, antique, craft and gift shops appealing to the tourist market. Bangor is approximately 10 miles away and many residents will be drawn to the City for comparison and bulk convenience purchases, particularly those who work in the City.
- 6.4** Convenience shopping is essentially limited to a Spar convenience store. We noted four vacant units which amounts to 13% of retail floorspace. The 2001 Chesterton Study noted that vacancy rates were low and we expect this to remain the case and assume these vacancies to be short term.
- 6.5** The town is served by bus services to Menai Strait and Bangor to the south and Benllech to the north. Free on-street car parking appears to be in very short supply and we would anticipate that this causes problems particularly at peak periods.

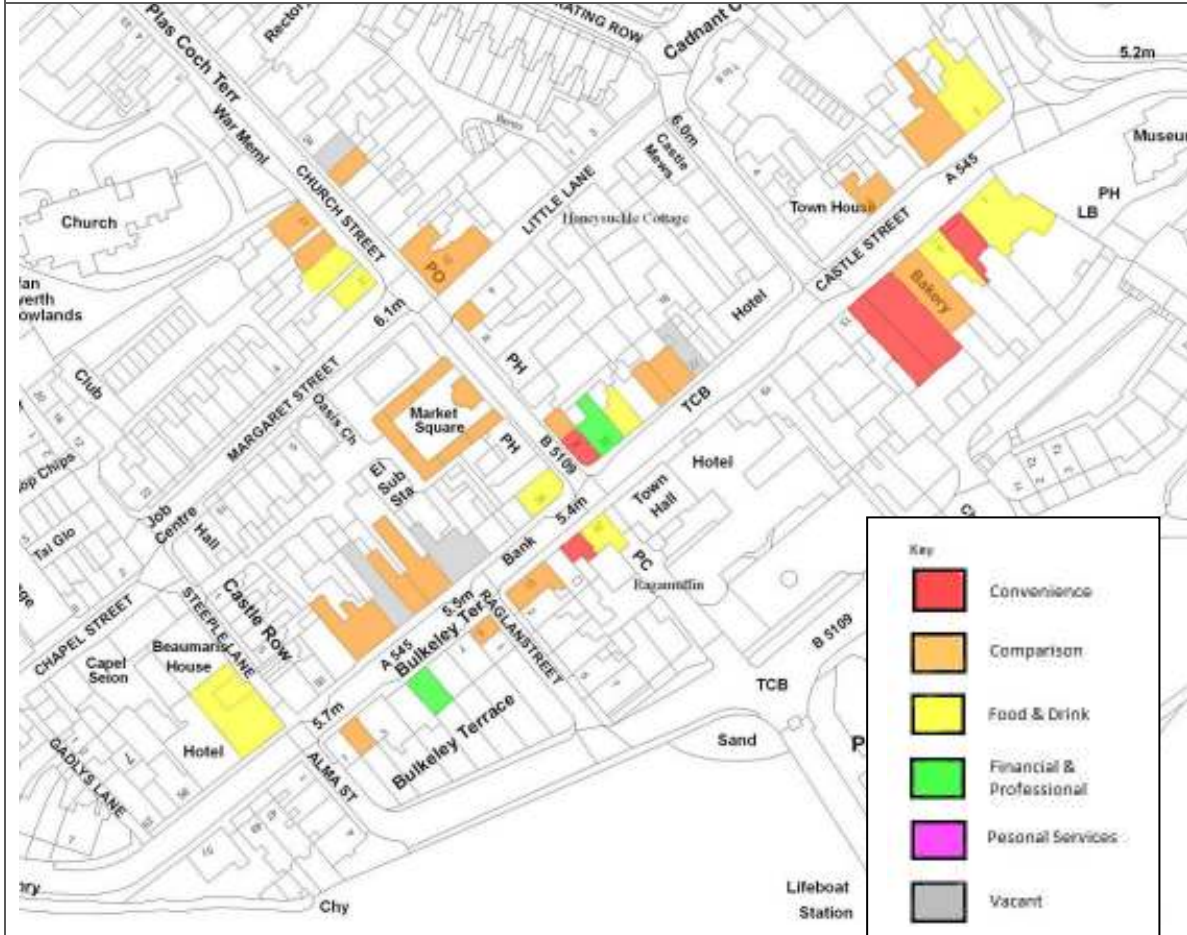
Photo 3: Castle Street Beaumaris



Conclusion

- 6.6 Beaumaris is a very attractive town compromised by a lack of car parking and congestion. Its retail business is heavily dependent on tourism and shopping to meet the needs of the local population is limited. However other centres, particularly Menai Bridge and Bangor, provide retail facilities for Beaumaris residents and we see no reason to recommend the allocation of additional retail floorspace.

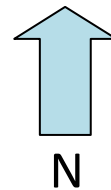
Plan 4: Retail Structure, Beaumaris



Not to Scale

Source: Applied Planning survey, June 2012

© Crown copyright and database rights 2012 Ordnance Survey 100023387



7 BENLLECH

Summary	
Study Zone	3
Population (2001)	3,408
Comparison Floorspace (Net Sq.m.)	474
Convenience Floorspace (Net Sq.m.)	388
Comparison Turnover £m	1.44
Convenience Turnover £m	3.74
Percent of Turnover from Tourism	27.2
No. Comparison Shops	6
No. Convenience Shops	5
No. Vacant Units	0
Nearest Major Centre (miles)	Bangor: 10 Llangefni: 8

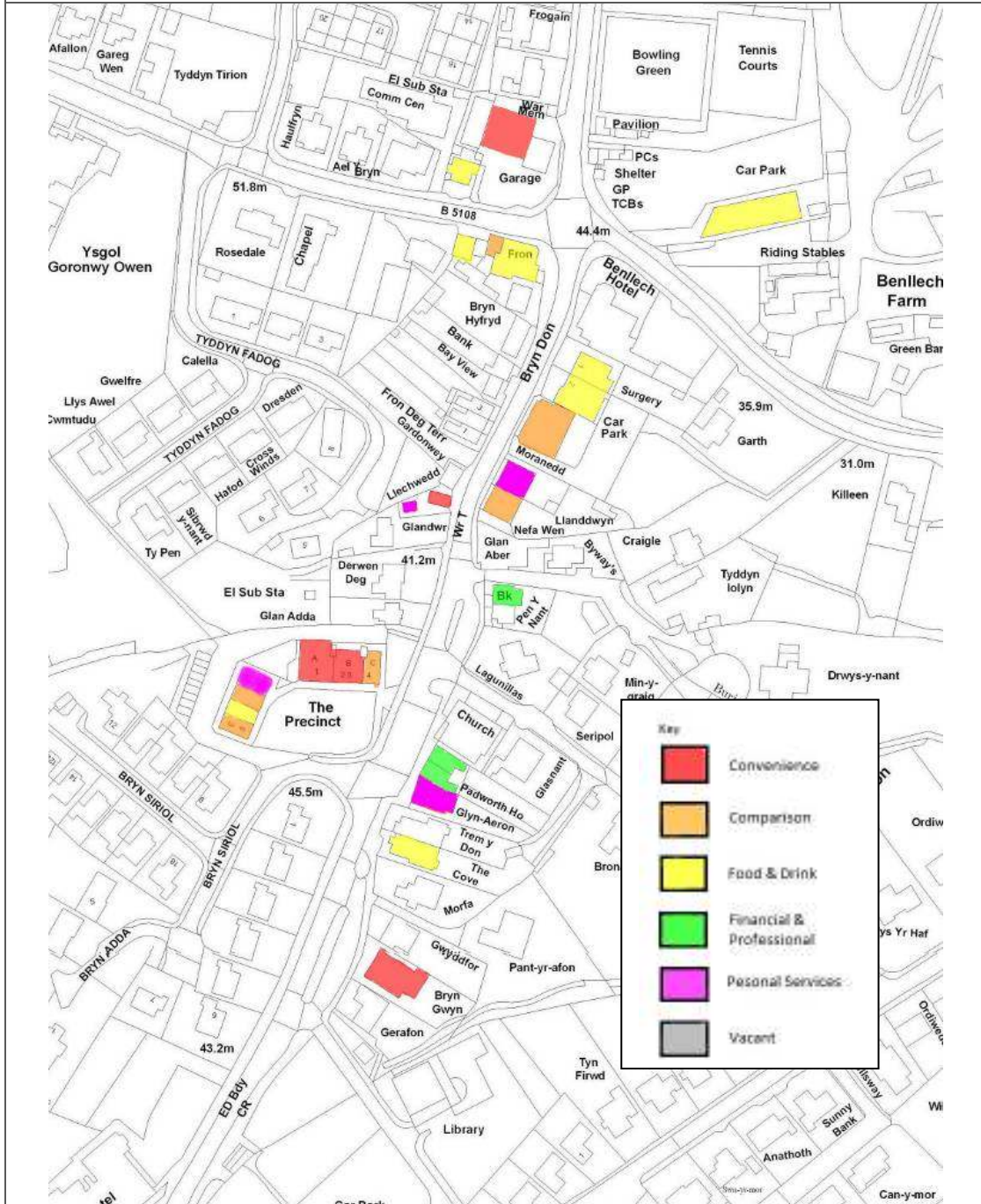


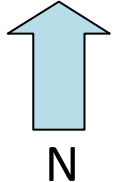
- 7.1** Benllech is a small coastal town in eastern Anglesey midway between Amlwch and Beaumaris consisting largely of modern residential estate development to the south and large caravan sites to the north.
- 7.2** The town centre is a jumble of styles with no coherent layout. Retail facilities are fragmented with the main concentration at and around 'The Precinct' which is a parade of shops around two sides of a parking area. The development which probably dates from the late 1960's is anchored by a large Spar convenience store along with a cafe, hairdressers and launderette. Opposite is a small Co-operative convenience store and the town also contains hot food take-aways, a small Costcutter convenience store attached to the petrol station on the northern entrance to the town and a sizeable chemist's shop.
- 7.3** Although accessible to both Llangefni and Bangor the town achieves an overall density of £4,790 sq.m. which indicates that shops in the town are well supported by the local population.

Conclusion

- 7.4** Benllech provides essential services for the immediate area. The quality of the shops is mediocre and do not appear to maximise the potential of the tourist market. Clearly the town is used primarily for convenience shopping and there are three convenience stores which provide a good level of choice and competition. There are no vacant units but we would recommend that any additional retail floorspace should be achieved through the extension of an existing business which would improve the range of goods on offer rather than to duplicate what is already available.


Plan 5: Retail Structure, Benllech



<p>appliedplanning CHARTERED TOWN PLANNING CONSULTANTS</p>	<p>Not to Scale</p> <p>Source: Applied Planning survey, June 2012</p> <p>© Crown copyright and database rights 2012 Ordnance Survey 100023387</p>	
---	---	---

8 BETHESDA

Summary	
Study Zone	7
Population (2001)	4,327
Comparison Floorspace (Net Sq.m.)	583
Convenience Floorspace (Net Sq.m.)	477
Comparison Turnover £m	1.17
Convenience Turnover £m	2.91
Percent of Turnover from Tourism	26.34
No. Comparison Shops	14
No. Convenience Shops	5
No. Vacant Units	30
Nearest Major Centre (miles)	Bangor: 6



The map shows the location of Bethesda in North Wales. It is situated south of Bangor, near the entrance to Snowdonia National Park. The map highlights the town's location with a red dot and an inset map showing the broader regional context.

- 8.1** Bethesda is a small town 6 miles to the south of Bangor astride the A5 at the entrance to the Snowdonia National Park. The town grew up to support the local slate and stone quarries and the centre is dominated by small cottages with more modern estates to the south.
- 8.2** The town centre is bounded by the River Ogwen to the west and high ground to the east and this has dictated a linear development to either side of A5 as it snakes along the valley. The road carries high volumes of traffic which detracts from the quality of the centre. Whilst there are buildings of quality including a number of Listed Buildings the majority are of more utilitarian quality. Clearly the town once supported a large centre but this has declined along with quarrying and due to the proximity of Bangor. The present population is less than half of that of its peak in the late 19th Century. Consequently there is a high vacancy rate amounting to 54% of retail floorspace and incidences of dereliction in sections of the High Street occur. Being on the edge of the National Park we estimate that tourist trade makes a significant contribution to turnover.
- 8.3** There is a reasonable mix of remaining businesses including a pharmacy, hardware, electrical, furnishings, houseware and gift shops and there are services such as banks, hairdressers, public houses, bookmakers, cafes and hot food take aways. There is a general lack of clothing and footwear outlets but this is expected given the proximity of Bangor. Convenience shopping is provided by a Londis store at the northern entrance to the centre and a modern Spar to the south along with a small greengrocer, baker and butcher.
- 8.4** The results of the household survey suggest a low overall trading density for comparison goods which bears out the impression that many of the businesses are only marginally viable but conversely convenience densities are high indicating that the town is important in meeting the day-to-day needs of the local community and surrounding small villages.

Photo 4: High Street, Bethesda

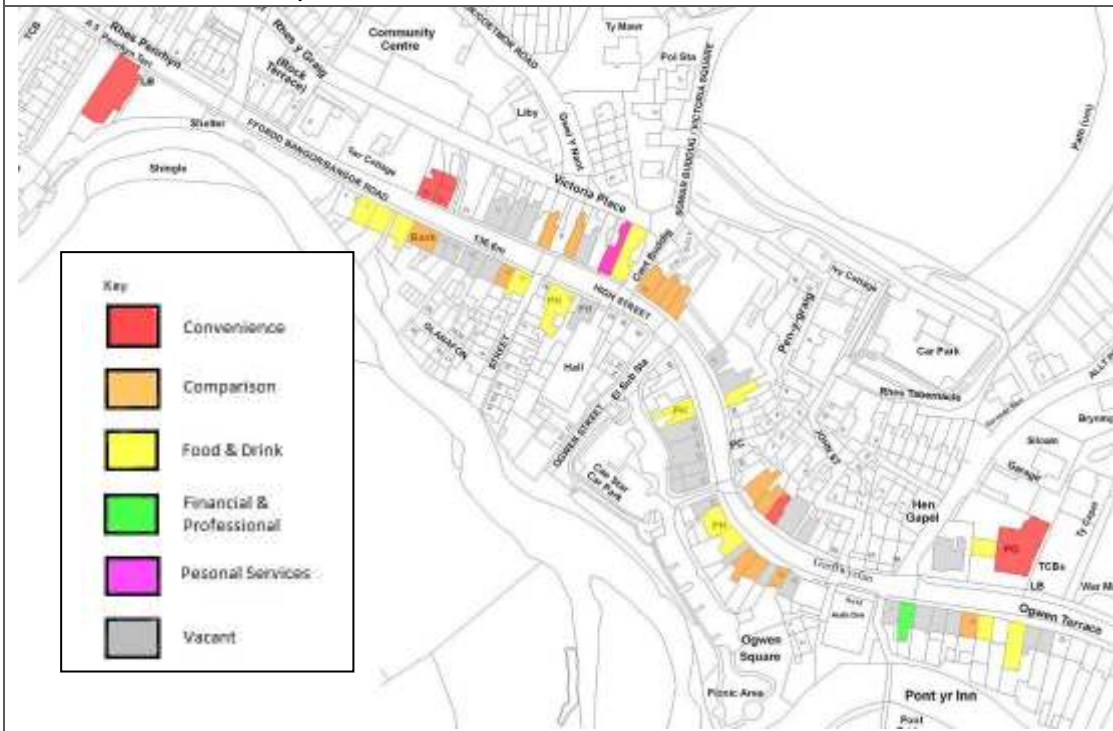


- 8.5** There are bus services to Bangor and Betws Y Coed and there is adequate free public car parks and on-street parking on side roads.

Conclusion

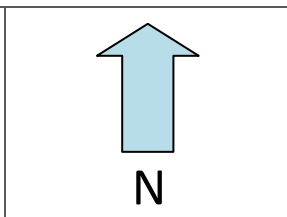
- 8.6** Clearly with 54% of all retail floorspace being vacant, Bethesda is not healthy in retail terms. Retailing has declined along with the fortunes of the town and whilst it does continue to provide a reasonable level of service to local residents it is difficult to see what could arrest this trend due to declining spending capacity of the catchment area and proximity of Bangor. We would expect the amount of comparison floorspace in use to decrease as businesses find it harder to survive and there is a strong case for encouraging conversions of retail properties at the edge of the centre to other uses. It would appear that the town would be capable of supporting more convenience floorspace and since our survey in June 2012 a Tesco Express has opened which will have accounted for any existing need.

Plan 6: Retail Structure, Bethesda




appliedplanning
CHARTERED TOWN PLANNING CONSULTANTS

Not to Scale
Source: Applied Planning survey, June 2012
© Crown copyright and database rights 2012 Ordnance Survey 100023387



9 BLAENAU FFESTINIOG

Summary	
Study Zone	12
Population (2001)	5,000
Comparison Floorspace (Net Sq.m.)	1,706
Convenience Floorspace (Net Sq.m.)	1,226
Comparison Turnover £m	9.96
Convenience Turnover £m	5.82
Percent of Turnover from Tourism	29.77
No. Comparison Shops	36
No. Convenience Shops	5
No. Vacant Units	13
Nearest Major Centre (miles)	Porthmadog: 12 Caernarfon: 28 Llandudno: 30 Bangor: 34



- 9.1** Blaenau Ffestiniog is surrounded by the Snowdonia National Park but excluded from the National Park's area. The town was a centre of the slate mining industry and its population peaked at 12,000 in the late 19th Century since when it has declined to its present level of around 5,000. The town is now more dependent on tourism with attractions such as the Ffestiniog Railway, the Llechwedd Slate Caverns as well as the surrounding countryside although this is degraded by extensive spoil heaps to the north of the town. The town and the immediate surrounding area would be best described as 'rugged'.
- 9.2** The town is situated on the A470 and the nearest main centre is Porthmadog 12 miles to the west and linked by the railway. There is a train link to Llandudno and bus services to Llandudno, Porthmadog and Caernarfon. Blaenau Ffestiniog is the only Local Centre in Zone 12 of the Household survey. Blaenau Ffestiniog retains only £2.43m or 16.7% of resident comparison expenditure. The main centre is Llandudno which attracts £6.71m, with Porthmadog and Bangor attracting £2.67m and £1.22m respectively. The town retains £4.03m or 39.2% of its resident convenience expenditure with £3.85m being drawn to Porthmadog and £0.84m to Llandudno.
- 9.3** Retailing is arranged in a long linear pattern to both sides of the main road which carries a considerable amount of traffic. There are public car parks in the centre of the town with on-street parking along sections of High Street and Church Street. Most of the residential areas of the town are to the south of the town centre separated in most part by the railway.

Photo 5: Church Street, Blaenau Ffestiniog

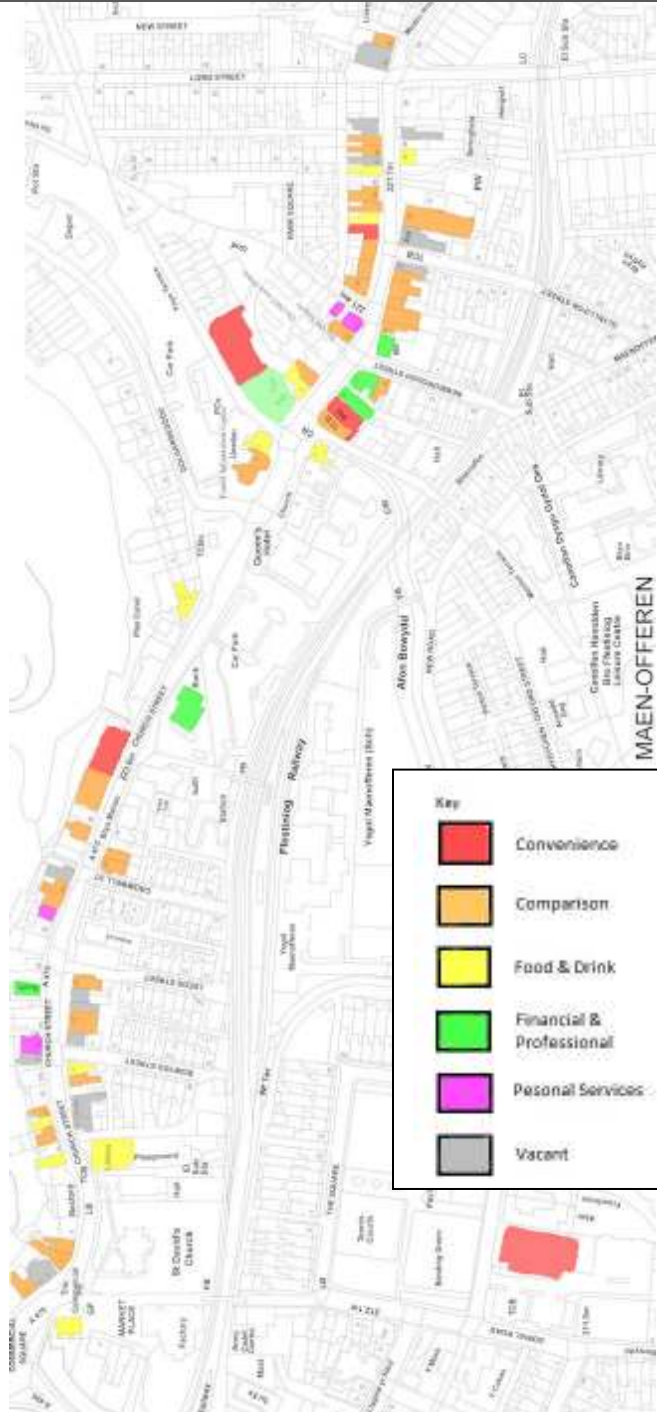


- 9.4** Although there is an eclectic variety of businesses including car spares, hardware, electrical products and floor coverings, the majority do not give the impression that they are prospering. The town also contains banking facilities, post office, pharmacy, hairdressers, hot food take-aways, public houses and betting shops.
- 9.5** The Co-operative accounts for most of convenience retailing along with a Spar, Eurospar and McColls. 21% of retail floorspace is vacant which brings the centre's overall trading density down to £2,649 sq.m. which is one of the lowest of the centres surveyed.

Conclusion

- 9.6** Blaenau Ffestiniog gives the impression of a declining retail centre and this is confirmed by the data. The town provides day-to-day services for local residents and tourists but much of available comparison expenditure leaks to other, quite distant, centres. It is probable that over the plan period that comparison shopping in the town will continue to decline as businesses become unviable and there is a case for reducing and concentrating shopping towards the centre and encouraging changes of use for the more peripheral properties.

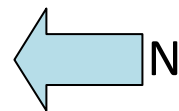
Plan 7: Retail Structure, Blaenau Ffestiniog



Not to Scale


Source: Applied Planning survey, June 2012

© Crown copyright and database rights 2012
Ordnance Survey 100023387



10 CEMAES

Summary	
Study Zone	1
Population (2001)	1,392
Comparison Floorspace (Net Sq.m.)	357
Convenience Floorspace (Net Sq.m.)	116
Comparison Turnover £m	1.13
Convenience Turnover £m	0.84
Percent of Turnover from Tourism	34.55
No. Comparison Shops	6
No. Convenience Shops	3
No. Vacant Units	4
Nearest Major Centre (miles)	Holyhead: 15

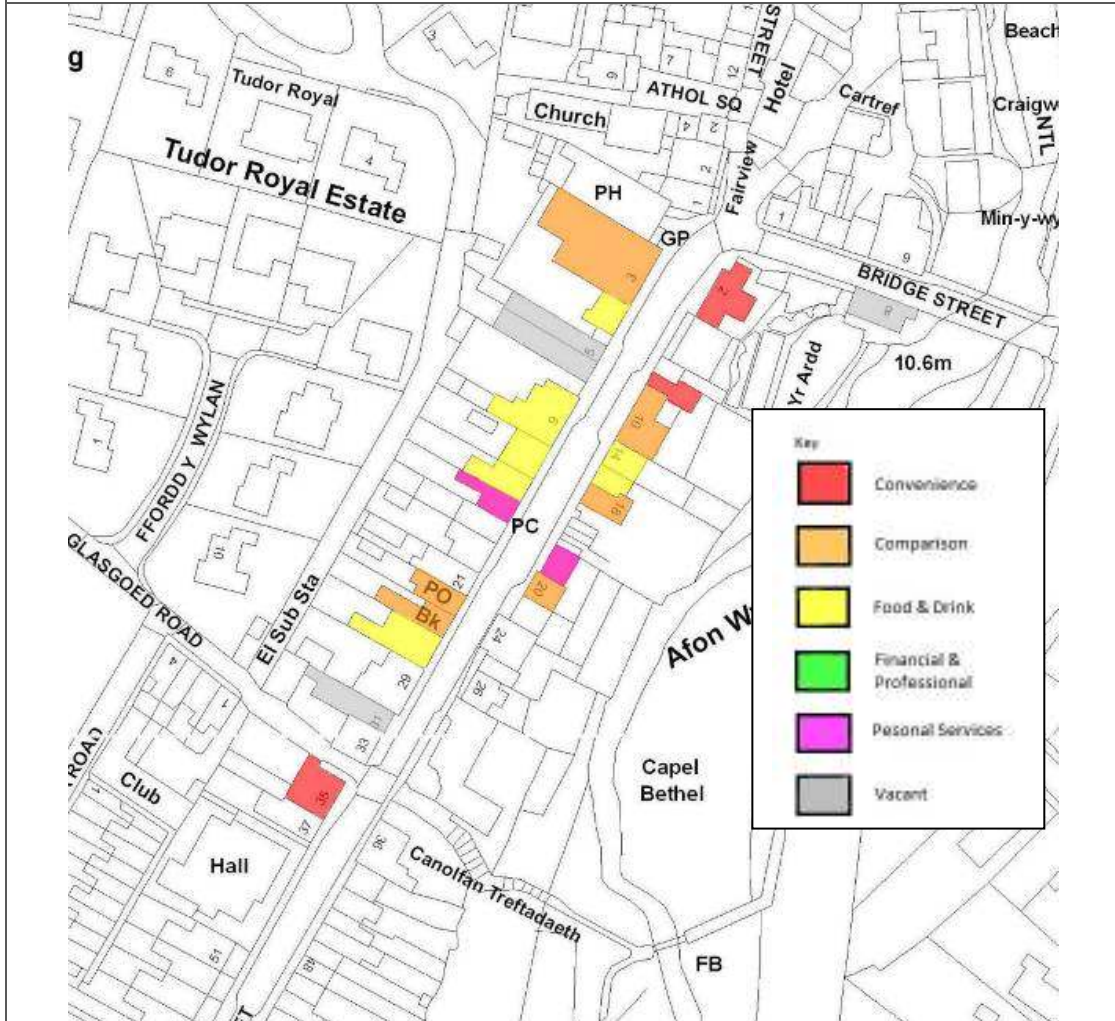


- 10.1** Cemaes is a village on the north Anglesey coast 6 miles to the west of Amlwch and 15 miles from Holyhead. The village is close to the Wylfa Nuclear Power Station which is being decommissioned. Plans to replace the plant with a new power station, Wylfa 'B', have been resurrected and there will be an increase in local expenditure both during the construction phase and as a result of legacy housing. We understand that it is likely that much of this accommodation will be provided nearer to Holyhead where surplus retail capacity was identified in Volume 1 of this Study.
- 10.2** The High Street is pleasant, consisting of traditional cottages whilst the rest of the village is modern estate housing. The retail centre is small but includes a post office, pharmacy and hardware shop along with a gallery and gift shops serving the tourist market. There are ladies hairdressers, cafes and public houses. Convenience shopping amounts to a McColls along with two shops selling greengrocery. At the time of our survey there were 4 vacant shop units amounting to 26% of the stock of retail floorspace. Using the methodology explained in Volume 1 we estimate that tourism contributes approximately £0.7m to local retail businesses as a whole.
- 10.3** There is a bus service to Holyhead and Amlwch and there is adequate public car parking as well as on-street parking.

Conclusion

- 10.4** The existing retail provision meets most day-to-day needs. However, given the distance to larger centres a larger convenience store in the right location could probably be justified on qualitative grounds and to meet the needs of any increased population resulting from the Power Station project.

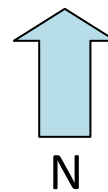
Plan 8: Retail Structure, Cemaes



Not to Scale


Source: Applied Planning survey, June 2012

© Crown copyright and database rights 2012
Ordnance Survey 100023387



11 CRICCIETH

Summary	
Study Zone	11
Population (2001)	1,826
Comparison Floorspace (Net Sq.m.)	973
Convenience Floorspace (Net Sq.m.)	329
Comparison Turnover £m	3.24
Convenience Turnover £m	2.48
Percent of Turnover from Tourism	40.2
No. Comparison Shops	19
No. Convenience Shops	5
No. Vacant Units	4
Nearest Major Centre (miles)	Porthmadog:5 Pwllheli: 9

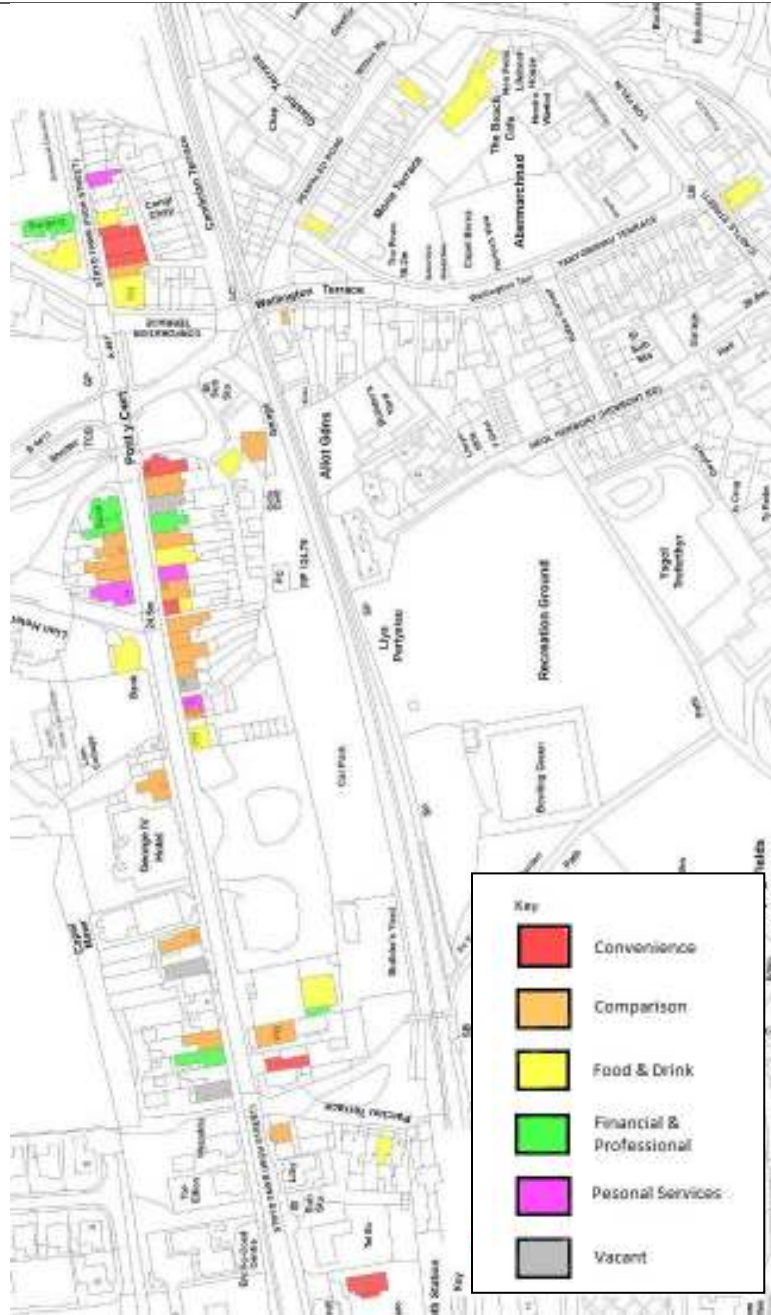


- 11.1** Criccieth is a small seaside town on the southern shore of the Llyn peninsula. It is nine miles from Pwllheli and five miles from Porthmadog via the A497 and by train and bus. Shopping is concentrated on the High Street which is set well back from the sea front and separated by a railway line.
- 11.2** There is a broad mix of comparison shops and services ranging from shoes, crystal, antiques to hardware. There is a pharmacy and ladies hairdressers along with banks and estate agents and a number of restaurants, pubs and cafes. Convenience shopping is provided by a Spar at the eastern end of High Street and a Petrol Filling Station Londis convenience store at the western entrance to the town centre. There is also a greengrocer, butchers and a bakery.
- 11.3** The results of the household survey indicate that both comparison and convenience stores are trading at reasonably healthy levels given the proximity of Porthmadog with an overall trading density of £3,733 sq.m. and we calculate that £2.3 of tourist expenditure is drawn to the town's shops.

Conclusion

- 11.4** The shops in Criccieth provide a reasonable level of service to residents and will attract a significant level of tourism. The town is highly accessible to both Pwllheli and Porthmadog which provide a wider choice of comparison shops as well as supermarkets for bulk shopping. We conclude that there is no apparent quantitative or qualitative need for additional floorspace to be allocated.

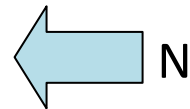
Plan 9: Retail Structure, Criccieth



Not to Scale

Source: Applied Planning survey, June 2012

© Crown copyright and database rights 2012
Ordnance Survey 100023387



12 GAERWEN

Summary	
Study Zone	4
Population (2001)	n/a
Comparison Floorspace (Net Sq.m.)	392
Convenience Floorspace (Net Sq.m.)	92
Comparison Turnover £m	2.17
Convenience Turnover £m	0.59
Percent of Turnover from Tourism	14.6
No. Comparison Shops	1
No. Convenience Shops	2
No. Vacant Units	0
Nearest Major Centre (miles)	Llangefni: 3 Bangor: 7

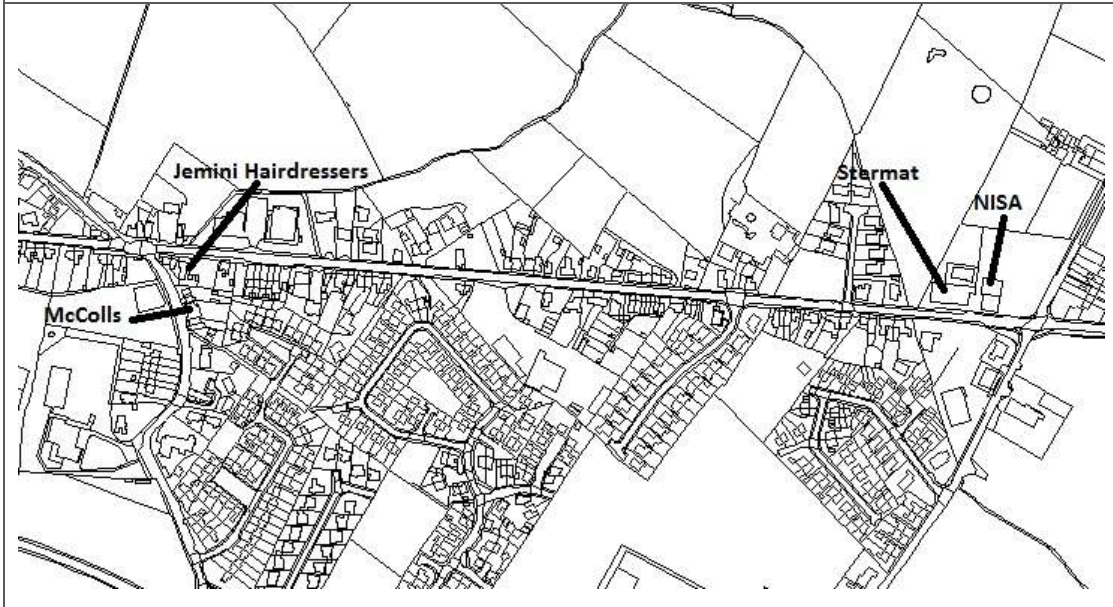


12.1 Gaerwen lies on the A5, 3 miles from Llangefni, and less than three miles from Llanfairpwll and seven miles from Bangor. The village is effectively by-passed by the A55 but the village contains a significant amount of industrial and distribution uses which generate traffic. Although there are remnants of the original village along the A5 most of the housing is modern estate development largely of bungalows. Although a small village, it is 0.6 miles from one end to the other. There is very little retail with only a Stermat hardware centre along with a Petrol Station based NISA convenience store at the western entrance to the village and a ladies hairdresser and a McColls convenience store towards the eastern end.

Conclusion

12.2 Gaerwen does not really function as a retail centre with local residents using the other nearby centres for their main shopping requirements with the NISA and McColls stores meeting more basic day-to-day needs.

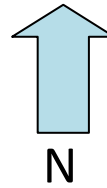
Plan 8: Retail Structure, Gaerwen




Not to Scale

Source: Applied Planning survey, June 2012

© Crown copyright and database rights 2012
Ordnance Survey 100023387



13 LLANBERIS

Summary		
Study Zone	8	
Population (2001)	1,954	
Comparison Floorspace (Net Sq.m.)	992	
Convenience Floorspace (Net Sq.m.)	362	
Comparison Turnover £m	2.57	
Convenience Turnover £m	2.17	
Percent of Turnover from Tourism	50.77	
No. Comparison Shops	15	
No. Convenience Shops	3	
No. Vacant Units	3	
Nearest Major Centre (miles)	Caernarfon: 8	

- 13.1** Llanberis is surrounded by the Snowdonia National Park. There is a small resident population and the village's location results in a limited catchment area. Consequently its shops are heavily dependent on tourism which supports a number of gift and craft shops as well as take-aways and cafes. Its popularity as a base for hiking and other outdoor pursuits is reflected in the preponderance of outdoor clothing shops within the town's comparison retail offer. Shopping is arranged along the High Street but is interspersed with hotels, restaurants and residential uses. Convenience shopping is provided by a Costcutter and a large Spar.

Photo 6: High Street, Llanberis

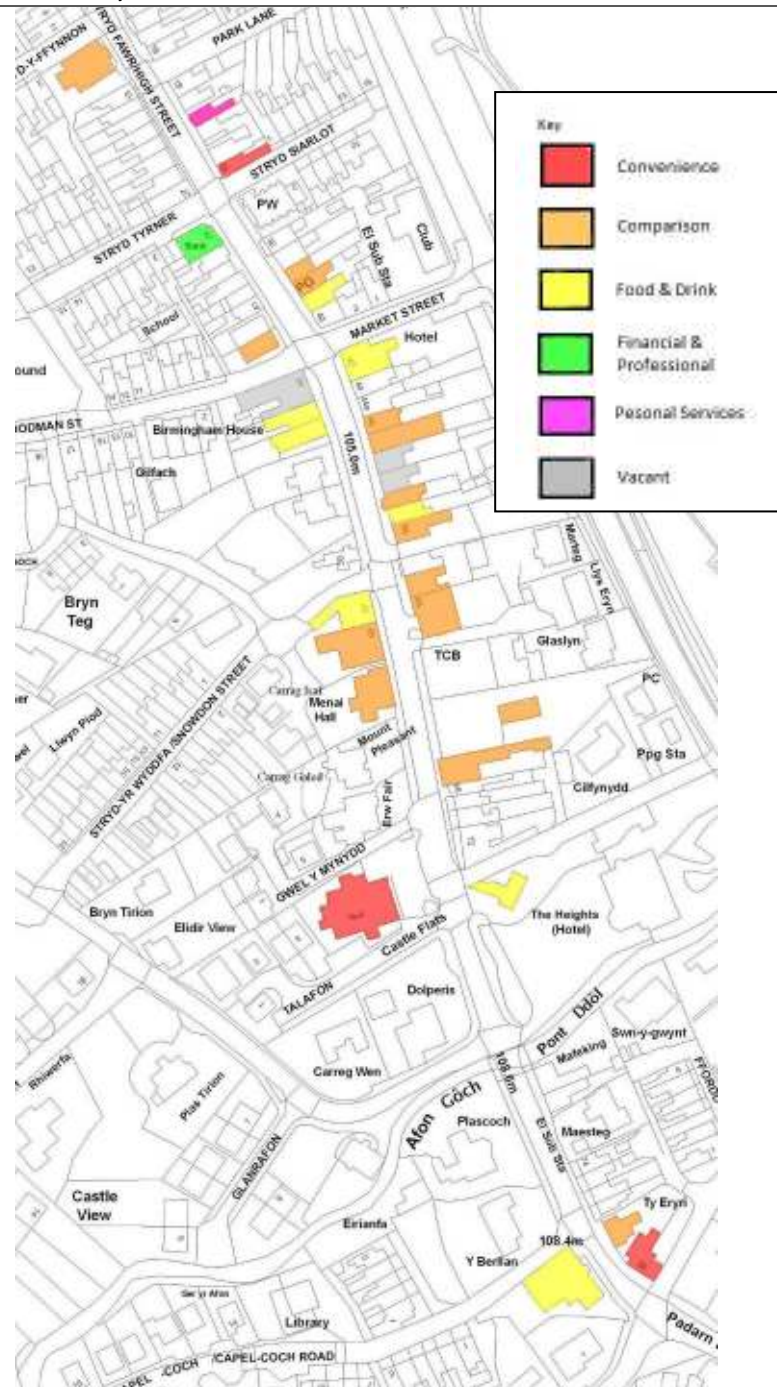


- 13.2** Out of a total of 21 retail properties our survey noted that 3 were vacant amounting to around 12% of retail space. Whilst this proportion is not excessive, the vacancies are in the centre of the High Street which does detract from the vibrancy of the retail centre.
- 13.3** The appearance of the village is generally good with no graffiti or litter. The building stock is attractive if unremarkable being a mixture of stone and render, some of which are painted in vibrant colours. The main road by-passes the village centre which reduces the amount of through traffic. We doubt whether the by-pass discourages shoppers as the village is a well known destination. There is on-street parking with a large pay-and-display public car park by the lakeshore with additional parking at the Visitor Centre. There are bus services to Bangor and Caernarfon.

Conclusion

- 13.4** The present stock of retail premises appears to meet the needs of the local catchment area in providing for day-to-day requirements as well as the tourist market. We conclude that there is no quantitative or qualitative need to allocate additional floorspace and that any future planning applications involving retail use must be modest and be judged on their own merits.

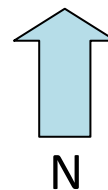
Plan 10: Retail Structure, Llanberis



Not to Scale

Source: Applied Planning survey, June 2012

© Crown copyright and database rights 2012
Ordnance Survey 100023387



14 LLANFAIRPWLL

Summary	
Study Zone	4
Population (2001)	3,040
Comparison Floorspace (Net Sq.m.)	1,626
Convenience Floorspace (Net Sq.m.)	1,117
Comparison Turnover £m	5.07
Convenience Turnover £m	7.78
Percent of Turnover from Tourism	34.01
No. Comparison Shops	9
No. Convenience Shops	3
No. Vacant Units	0
Nearest Major Centre (miles)	Bangor: 4



The map shows the study zone in Llanfairpwllgwyng, North Wales. It is situated on the A5 road, approximately 4 miles from Bangor. The map includes an inset showing the location of the study zone within the island of Wales.

- 14.1** Llanfairpwll stands on the A5 which used to be the main Holyhead-London Trunk Road before the construction of the A55 dual carriageway across the island and is only four miles from Bangor. Retailing is unusual in that it consists of a large Co-operative store and the Pringle Weavers centre which contains a variety of retail concessions including clothing and footwear outlets. The centre attracts shoppers and tourists from a wide catchment area and has coach parking facilities.
- 14.2** Along the Holyhead Road are a number of hot food take-aways, a needlecraft and cleaning business. There is a Londis associated with a Petrol Filling Station at the eastern entrance to the village along with a chemist, florist, charity shop and bridal shop. There is a Spar convenience store and ladies hairdresser in the housing estate to the north which are not shown on the following plan.
- 14.3** The Pringle Centre and Co-operative attract essentially car borne custom. The dispersed pattern of businesses and the impact of the A5 detract from Llanfairpwll acting as a retail centre with a defined heart.

Plan 11: Retail Structure, Llanfairpwll

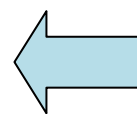
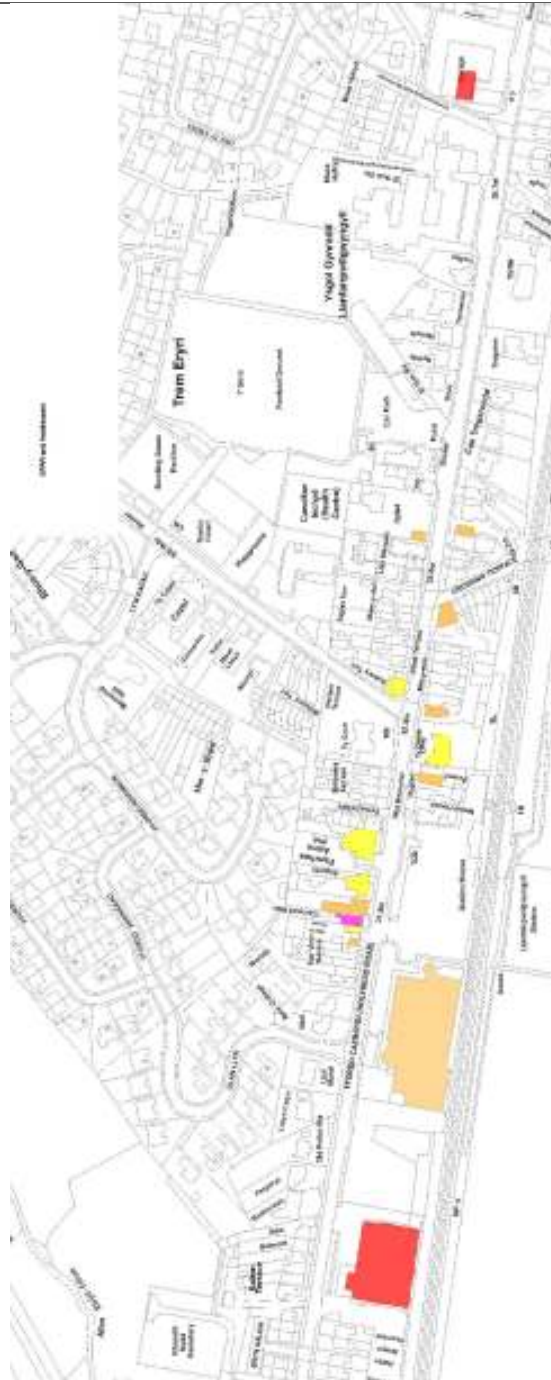


Photo 7: The Pringle Centre, Llanfairpwll



Conclusion

- 14.4** The Co-operative along with smaller Spar and Londis stores meet the convenience needs of the village and the wider area and the chemist, hairdressers and take-aways meet the demand for locally based services although the village does appear to lack a Post Office and Bank. The Pringle outlet caters more for the tourist market. Particularly given the proximity of Bangor there is no need for further retail floorspace to be allocated.

15 MENAI BRIDGE

Summary	
Study Zone	3
Population (2001)	3,850
Comparison Floorspace (Net Sq.m.)	1,309
Convenience Floorspace (Net Sq.m.)	1,239
Comparison Turnover £m	4.07
Convenience Turnover £m	9.83
Percent of Turnover from Tourism	36.85
No. Comparison Shops	25
No. Convenience Shops	7
No. Vacant Units	2
Nearest Major Centre (miles)	Bangor: 3



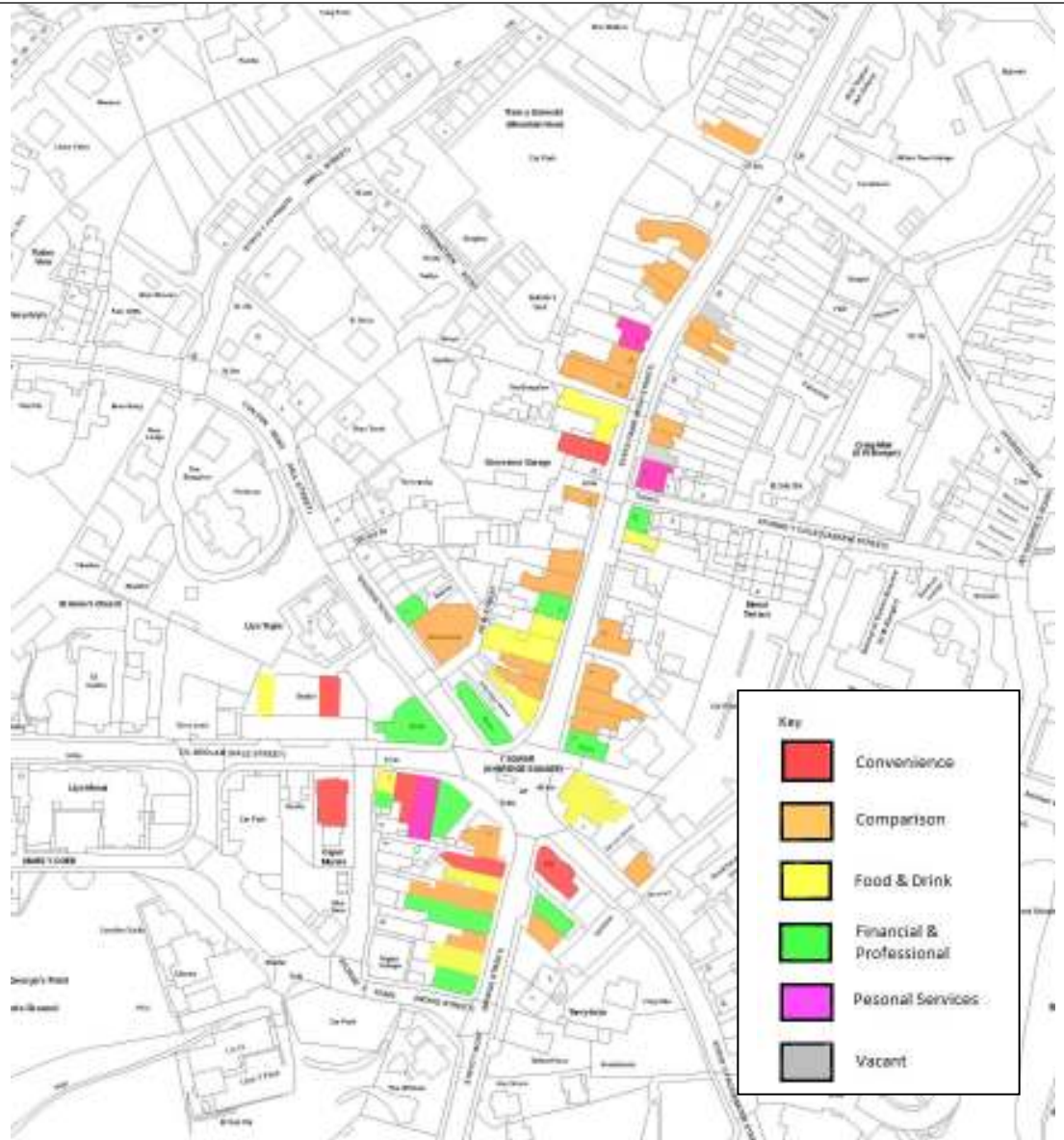
The map shows the Menai Bridge area, including the bridge itself and the surrounding roads and buildings. A red dot marks the location of the study zone. An inset map shows the location of the study zone within the context of the island of Anglesey.

- 15.1** Menai Bridge is a pleasant 'up-market' village which is only 3 miles from Bangor across the Menai Strait. Given the proximity of Bangor, the village retains a strong retail presence including outdoor clothing and dress shops, interior design, cafes, wine bars, restaurants, hairdressers, a pharmacy, post office, banks and hardware shops and A2 uses such as estate agents.
- 15.2** Convenience shopping is provided primarily by an out-of-centre Waitrose store. We recorded only two vacant shop units amounting to 2% of floorspace.

Conclusion

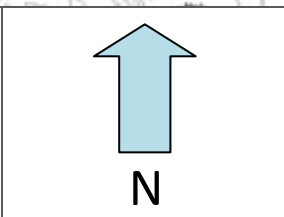
- 15.3** The village displays good levels of vitality and viability and, given the proximity of Bangor, we conclude that the retail facilities provide a good level of service to residents. There is no evidence of either a quantitative or qualitative need for additional facilities.

Plan 12: Retail Structure, Menai Bridge




appliedplanning
 CHARTERED TOWN PLANNING CONSULTANTS

Not to Scale
 Source: Applied Planning survey, June 2012
 © Crown copyright and database rights 2012
 Ordnance Survey 100023387



16 NEFYN

Summary	
Study Zone	10
Population (2001)	2,619
Comparison Floorspace (Net Sq.m.)	128
Convenience Floorspace (Net Sq.m.)	364
Comparison Turnover £m	1.08
Convenience Turnover £m	2.48
Percent of Turnover from Tourism	16.83
No. Comparison Shops	2
No. Convenience Shops	3
No. Vacant Units	7
Nearest Major Centre (miles)	Pwllheli: 7

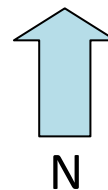
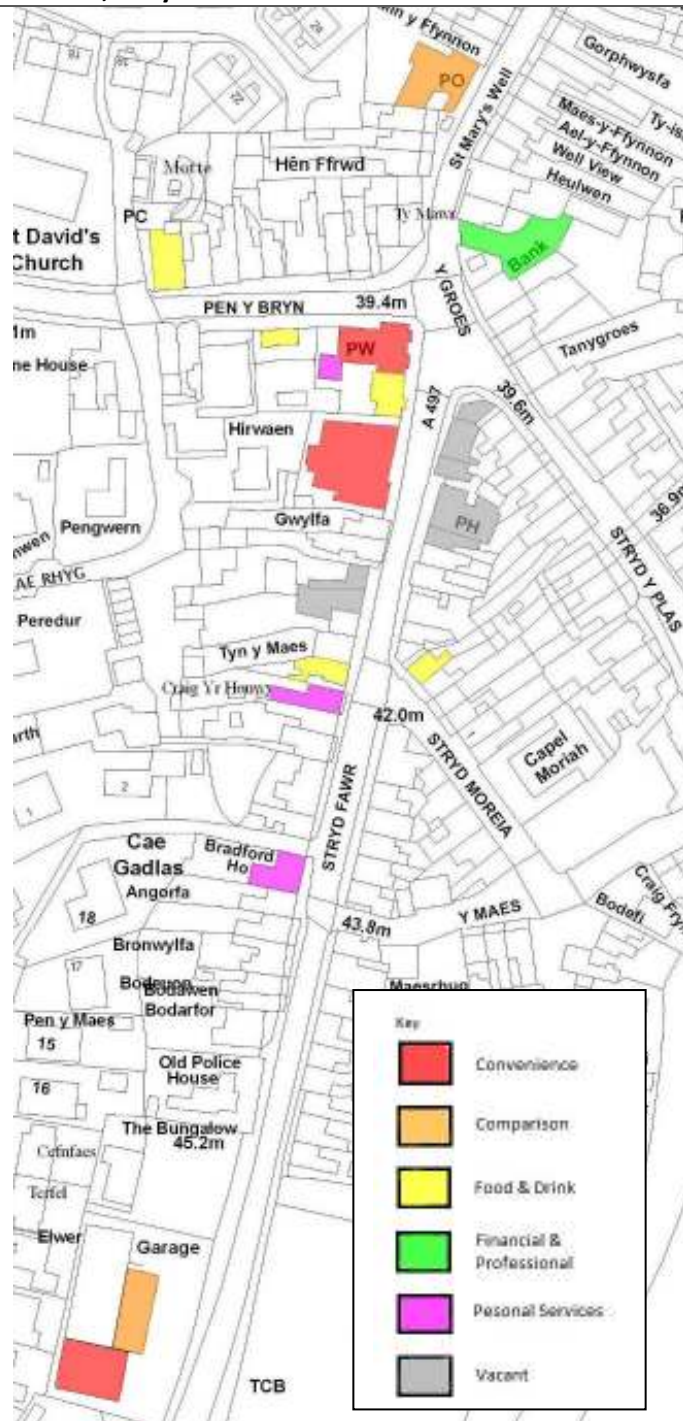


- 16.1** Nefyn is a densely packed village consisting of cottages, largely rendered with occasional stone built properties. The roads are narrow and congested with parked cars. Footpaths are also limited in width and, in part, non-existent. The overall environment gives a run-down appearance with some properties in need of restoration. However there is no evidence of litter, graffiti or vandalism.
- 16.2** The village is somewhat isolated, the nearest major centre being Pwllheli. In population terms, the catchment area is very restricted. Retailing is primarily at the northern end of the High Street where there is a Spar convenience store with the Post Office on St Mary's Well and a Londis at a garage at the southern entrance to the village. The village also provides a bank and hairdressers. Our survey shows that 33% of retail floorspace is vacant, a similar figure was noted in the Chesterton Retail Study 2001.
- 16.3** The household survey suggests that the combined trade attracted to Nefyn, allowing for tourism, is £3.56m. This results in an overall trading density (turnover per sq.m.) of £4,844 which for a village of this size is very reasonable particularly given the high vacancy rate which tends to indicate that the remaining businesses are trading well.
- 16.4** In terms of accessibility, there is a bus service to Pwllheli and car parking is largely on-street although there is a public car park at Stryd y Plas.


Conclusion

- 16.5** Nefyn appears to be a struggling retail centre with limited local expenditure and little to attract the tourist market. Significant environmental improvements are needed to arrest and reverse the village's decline in order to attract sufficient business to support the remaining shops and services. We can see no justification for additional retail space to be allocated although we would suggest that changes of use could be considered to support any appropriate business initiatives.

Plan 13: Retail Structure, Nefyn



17 PENRHYNDEUDRAETH

Summary		
Study Zone	11	
Population (2001)	2,619	
Comparison Floorspace (Net Sq.m.)	529	
Convenience Floorspace (Net Sq.m.)	189	
Comparison Turnover £m	1.32	
Convenience Turnover £m	1.91	
Percent of Turnover from Tourism	19.71	
No. Comparison Shops	8	
No. Convenience Shops	1	
No. Vacant Units	2	
Nearest Major Centre (miles)	Porthmadog: 3	

- 17.1** Perhyndeudraeth is a small, attractive, well kept village astride the A487 approximately three miles east of Porthmadog. The village contains 11 shops including a convenience store, chemist and hardware shop along with a bank, hairdressers, public house and hot food take-aways which are largely situated along High Street and interspersed with residential properties.

Photo 8: High Street, Perhyndeudraeth

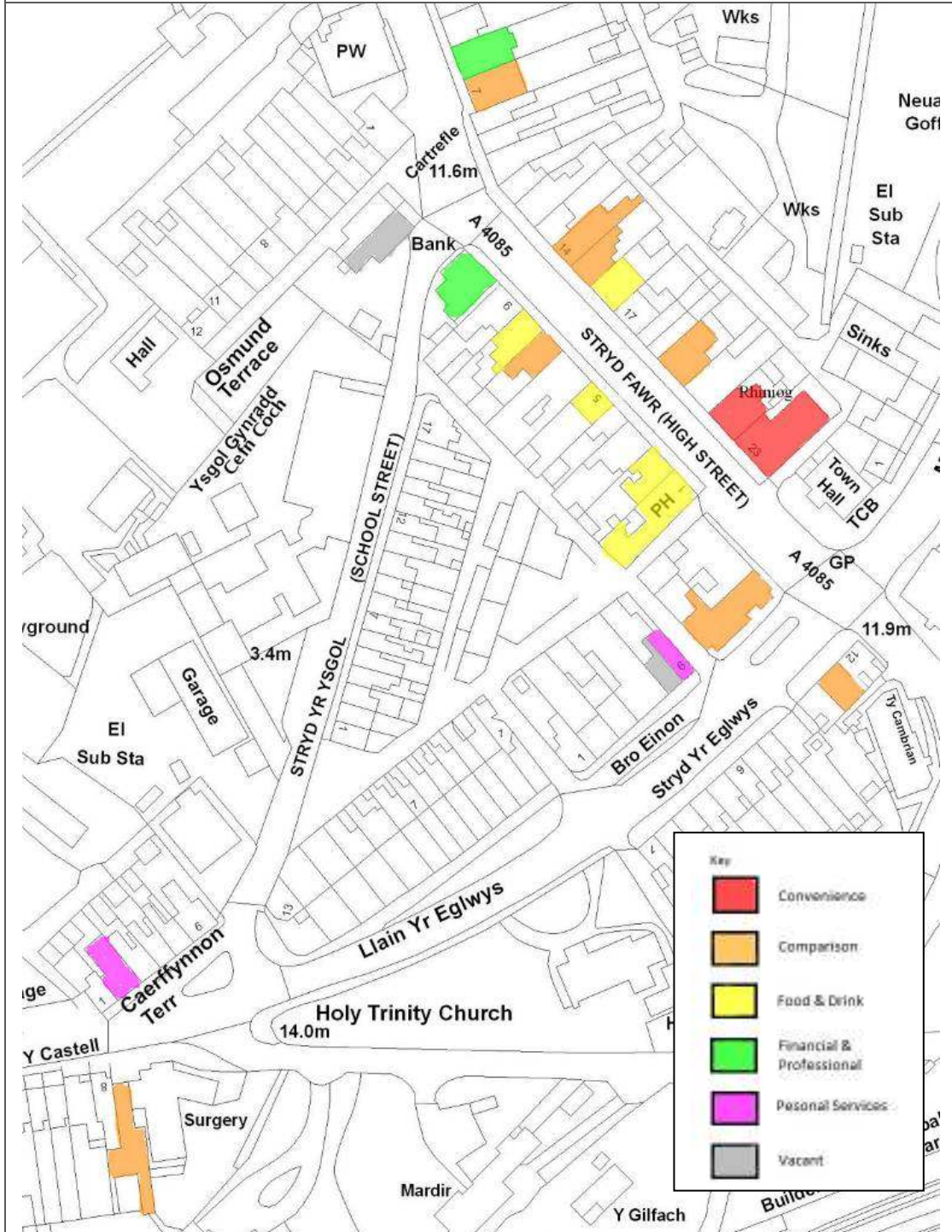


- 17.2** The household survey indicates that, including tourism expenditure, the centre achieves a respectable overall trading density of £4,059 sq.m. Our survey identified two vacant retail properties amounting to 10% of available retail floorspace.

Conclusion


- 17.3** Particularly given its proximity to Porthmadog we conclude that the retail offer provides a good level of service to local residents commensurate with its size and role in the retail hierarchy. However, out of all the Local Centres, Perhyndeudraeth generates the highest trading densities albeit from a limited market. We would recommend that any additional retail convenience floorspace should be achieved through the extension of an existing business which would improve the range of goods on offer rather than to duplicate what is already available. Otherwise, we do not consider that there is a need to allocate additional retail floorspace.

Plan 14: Retail Structure, Perhyndeudraeth



18 PENYGROES

Summary	
Study Zone	11
Population (2001)	1,770
Comparison Floorspace (Net Sq.m.)	731
Convenience Floorspace (Net Sq.m.)	320
Comparison Turnover £m	1.75
Convenience Turnover £m	2.93
Percent of Turnover from Tourism	20.52
No. Comparison Shops	10
No. Convenience Shops	4
No. Vacant Units	7
Nearest Major Centre (miles)	Caernarfon: 7

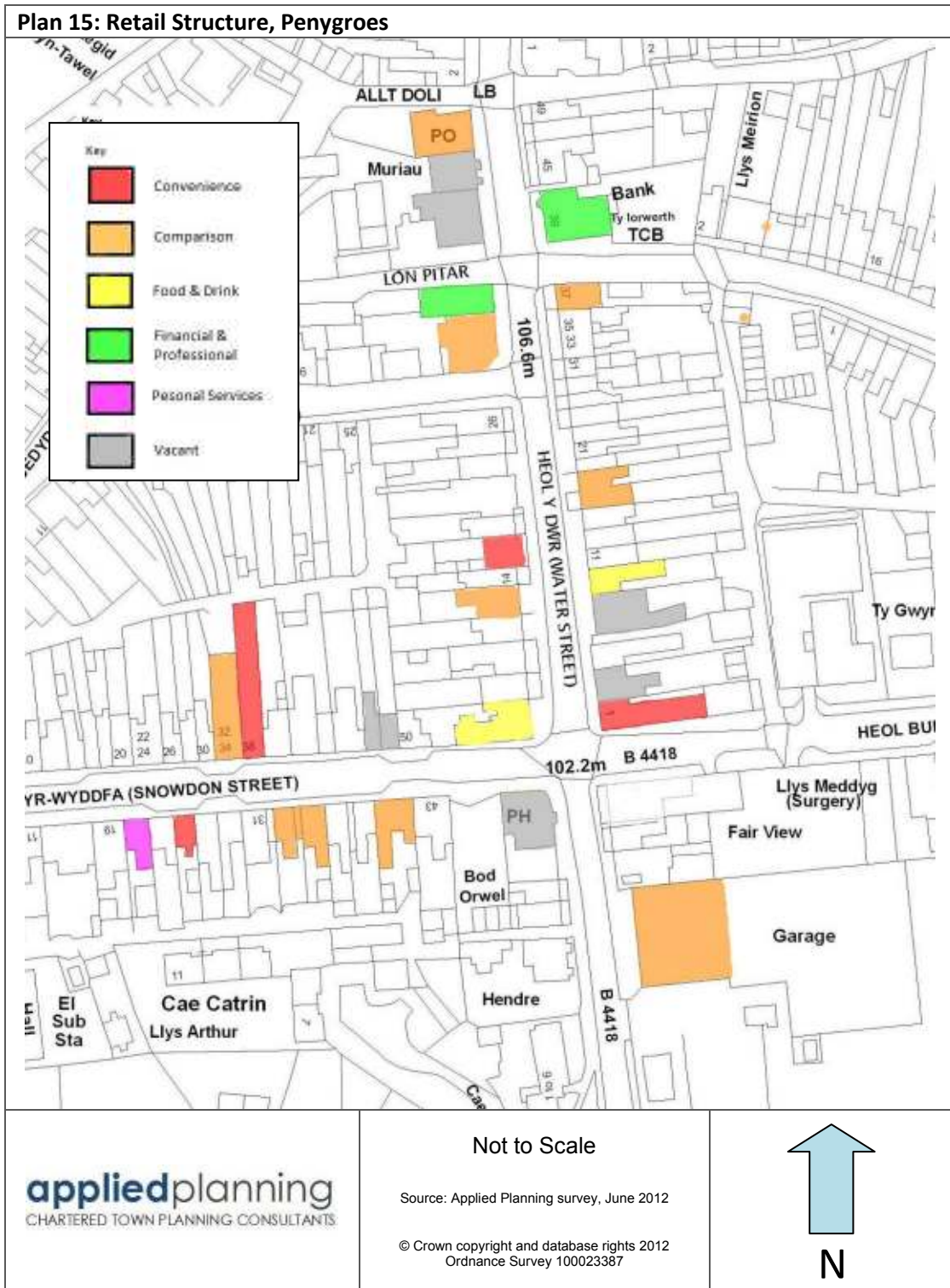


- 18.1** Penygroes is a large village approximately seven miles south of Caernarfon on the A487. The village is densely developed with terraces of relatively small properties largely pebble-dashed which gives a drab, uninspiring, and monotonous character. There is little in the way of open space, planting or street furniture and there is little to attract spending from tourists visiting the area.
- 18.2** The village's retail properties and services include four convenience stores including Co-operative and Londis stores (note this is not shown on Plan 15), hairdressers, take-aways, public houses and banks. These commercial properties are dispersed in a fragmented pattern along Water Street and Snowdon Street.
- 18.3** The household survey shows that resident convenience retailing accounts for £2.48m of expenditure compared to resident comparison goods expenditure of £1.24. When tourism is factored in this results in a convenience goods trading density of £9,147 sq.ft which even given the limitations of retail modelling at this scale is high. Overall the village shops achieve £3,203 per sq.m. when vacant properties, which we assess amount to 30% of retail floorspace, are taken into account.
- 18.4** The village is well served by public transport to Caernarfon, Bangor and Porthmadog and there appears to be sufficient available on-street car parking to cater for shopper's needs although there is a public car park available for peak periods.

Conclusion

- 18.5** The assessment indicates that the village would benefit from improved convenience facilities. We consider that this should be achieved through a change of use or small scale development of an existing property to improve the level of choice and provision given the existing level of convenience spending capacity.

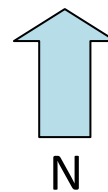
Plan 15: Retail Structure, Penygroes



Not to Scale


Source: Applied Planning survey, June 2012

© Crown copyright and database rights 2012
 Ordnance Survey 100023387



19 RHOSNEIGR

Summary	
Study Zone	2
Population (2001)	745
Comparison Floorspace (Net Sq.m.)	280
Convenience Floorspace (Net Sq.m.)	188
Comparison Turnover £m	0.36
Convenience Turnover £m	0.68
Percent of Turnover from Tourism	71.49
No. Comparison Shops	6
No. Convenience Shops	2
No. Vacant Units	0
Nearest Major Centre (miles)	Holyhead: 14 Llangefni: 12

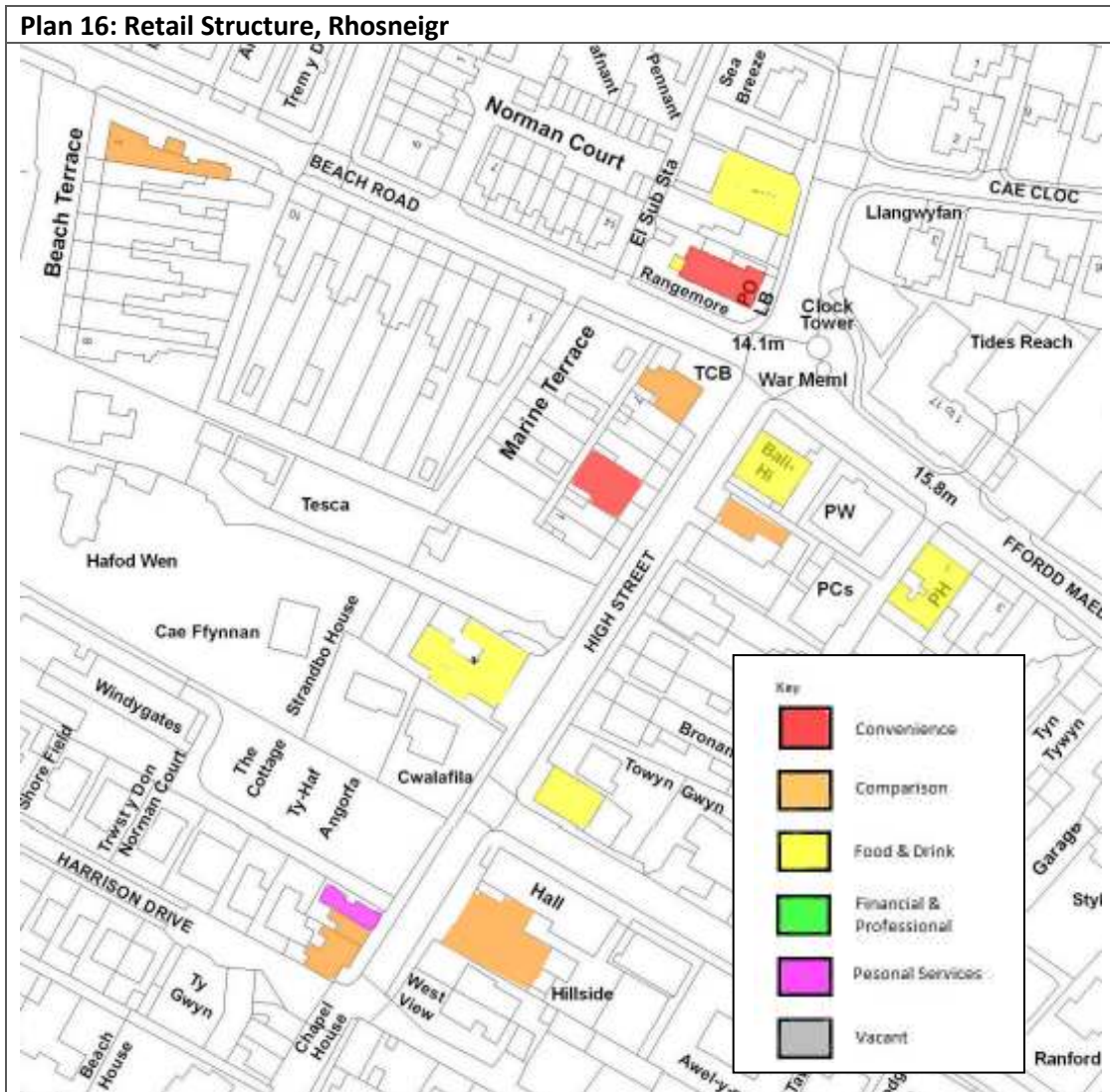



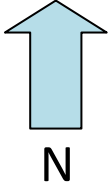
- 19.1** Rhosneigr is a coastal village which is somewhat isolated by RAF Valley to the north and is served by a loop road off the A4080 linking to the A5 and A55 main roads. Consequently there is little 'passing trade' and the natural retail catchment area is limited. The village is a popular location for second homes which again will tend to limit the demand for local services from residents. The original village centre is very small but there has been a large amount of recent residential developments and the number of caravan sites in the area will boost spending from tourism particularly during the summer months.
- 19.2** There are very limited retail facilities in the village amounting to two convenience stores, a hairdressers and a number of 'surf-shacks'.
- 19.3** Whilst facilities are limited, the isolated nature of the village means that shops can only realistically attract a limited amount of trade from the local community and tourists attracted to the beach. The household survey and our tourism model indicate that the convenience stores are achieving a good, but not excessive, trading density of £3,600. However, overall trading densities are poor at £2,221 sq.m.

Conclusion

- 19.4** Even given the amount of recent residential development in the village, we conclude that the existing, albeit limited, facilities are sufficient to cater for local needs and further allocations of retail floorspace are not needed.


Plan 16: Retail Structure, Rhosneigr



 <p>CHARTERED TOWN PLANNING CONSULTANTS</p>	<p>Not to Scale</p> <p>Source: Applied Planning survey, June 2012</p> <p>© Crown copyright and database rights 2012 Ordnance Survey 100023387</p>	
--	---	---

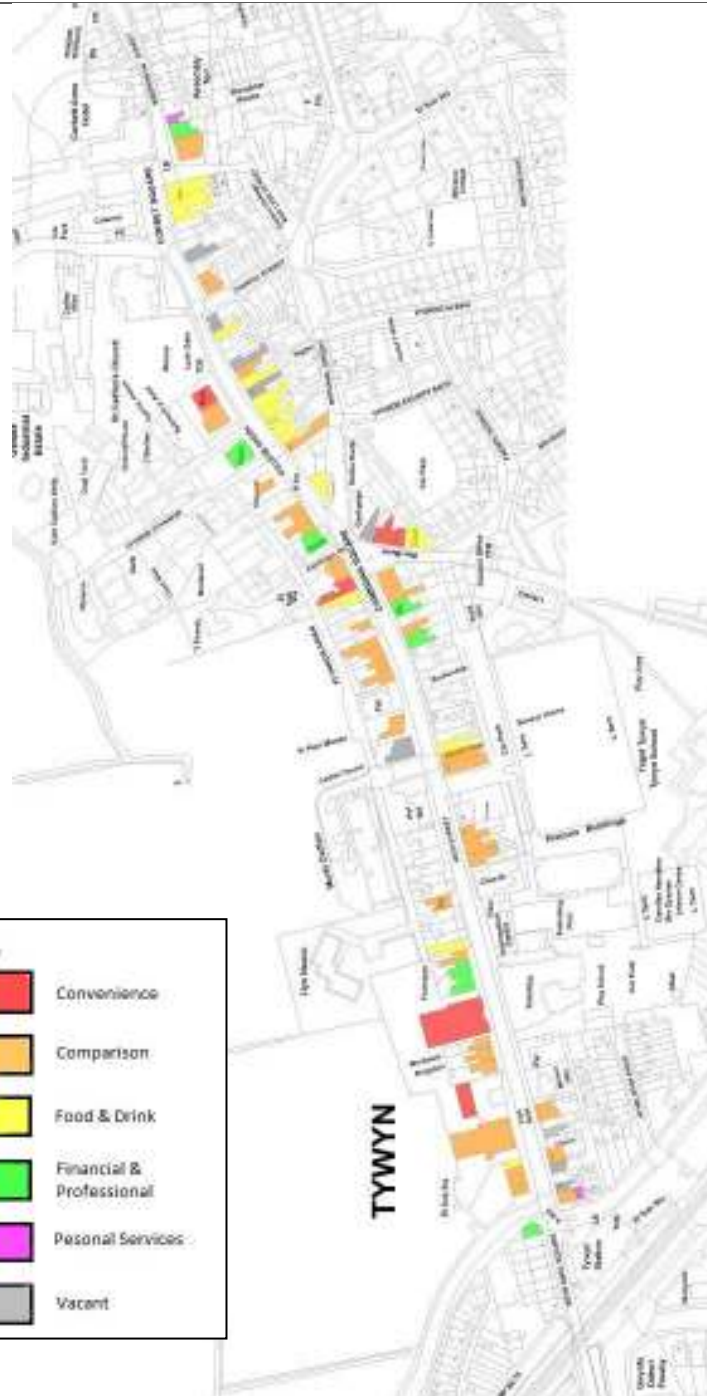
20 TYWYN

Summary	
Study Zone	15
Population (2001)	2,864
Comparison Floorspace (Net Sq.m.)	2,091
Convenience Floorspace (Net Sq.m.)	1,663
Comparison Turnover £m	6.28
Convenience Turnover £m	12.70
Percent of Turnover from Tourism	32.17
No. Comparison Shops	32
No. Convenience Shops	5
No. Vacant Units	9
Nearest Major Centre (miles)	Dolgellau: 20 Aberystwyth: 33



- 20.1** Tywyn is a small coastal town in southern Gwynedd. Being between two estuaries it is isolated and remote from other major centres with the nearest, Aberystwyth, being over 30 miles away. The town centre is separated from the coast by the railway with the coastal zone being largely taken up with caravan parks.
- 20.2** The town centre has a quite attractive mix of Victorian buildings of various styles and materials. It is linear and retailing is interspersed with residential properties and particularly towards the east by restaurants, cafes, take-aways and public houses. The shopping street carries high volumes of traffic and congestion is a problem at peak periods.
- 20.3** Tywyn is the only town in Zone 15 of the household survey. This shows that the zone retains £3.64m of £16.16m of available resident comparison expenditure with £0.56m being attracted to Dolgellau and £6.96m to Aberystwyth. Very little is attracted into the Zone from further afield. Zone 15 retains £8.99m or 79.5% of resident convenience expenditure with Machynlleth/Aberdovey (in Zone 16) attracting £0.5m and Aberystwyth £1.13m. Tywyn lacks national multiple retailers but there is a good variety of independent businesses selling a full range of goods.
- 20.4** Convenience stores include a large modern Co-operative in Station Road (not included on the Plan 17) which accounts for approximately 70% of trade, two Spars and a Premier store. The town also has a popular Market.
- 20.5** The town is connected to rail services and bus services to the local area. Car Parking appears to be limited given the amount of tourist trade.

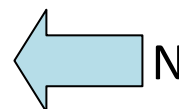
Plan 17: Retail Structure, Tywyn



Not to Scale


Source: Applied Planning survey, June 2012

© Crown copyright and database rights 2012
Ordnance Survey 100023387



21 VALLEY

Summary	
Study Zone	2
Population (2001)	2,413
Comparison Floorspace (Net Sq.m.)	781
Convenience Floorspace (Net Sq.m.)	426
Comparison Turnover £m	2.40
Convenience Turnover £m	2.16
Percent of Turnover from Tourism	25.07
No. Comparison Shops	12
No. Convenience Shops	3
No. Vacant Units	2
Nearest Major Centre (miles)	Holyhead: 4

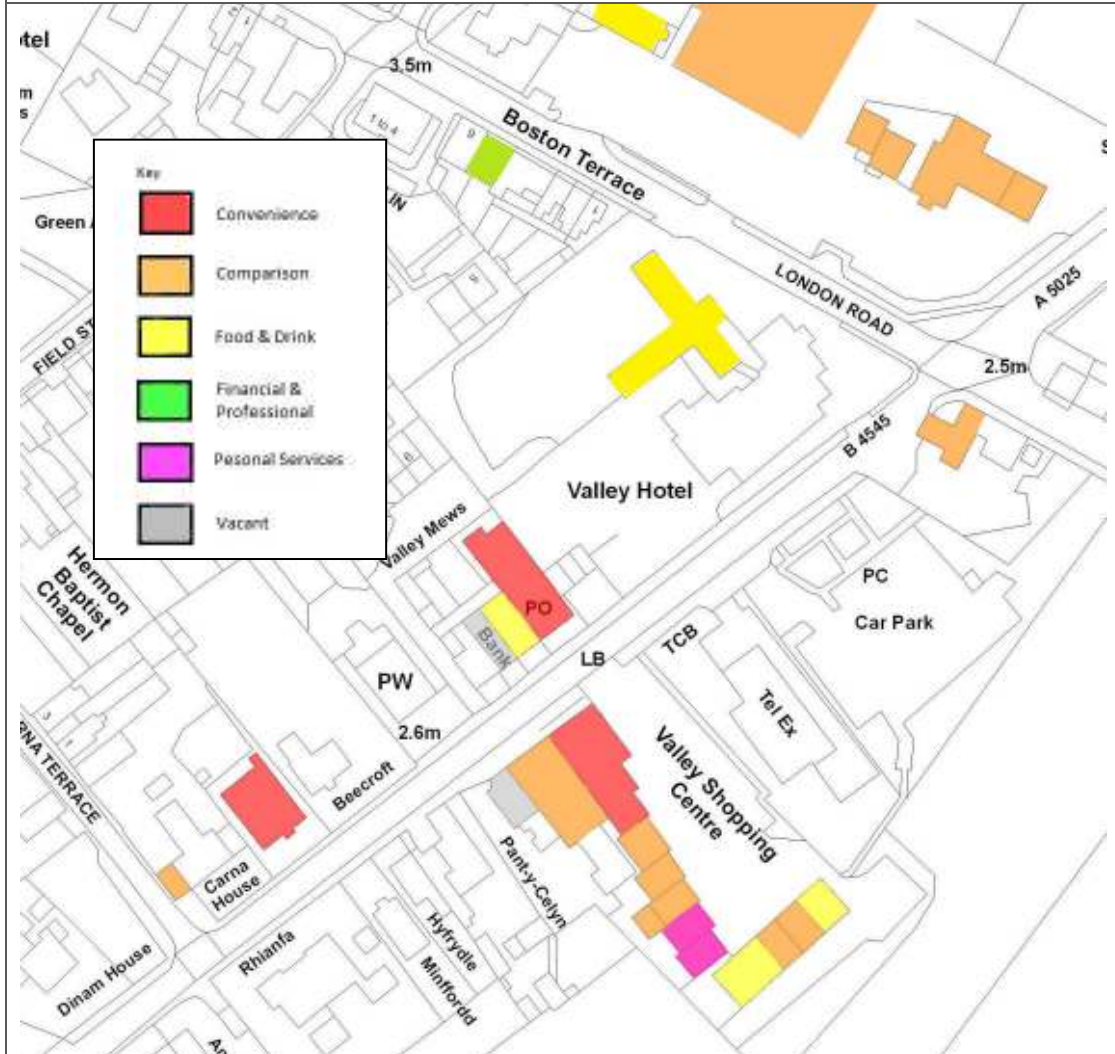


- 21.1** Valley was originally a very small village with hotels on the A5 which has been expanded by modern estate development. The village centre is very limited and consists of the Valley Shopping Centre and an open court of single and part two storey modern buildings fronted by a Spar convenience store with a Premier convenience store opposite. There is a butcher, hairdressers and a bank with some basic out-of-centre uses on the edge of the village.
- 21.2** Valley is approximately four miles from Holyhead and three miles to the large out-of-centre stores including Tesco and Morrisons at Penrhos. For most residents the village shops will therefore essentially provide for top-up shopping only.

Conclusion

- 21.3** Valley provides a limited retail role largely due to the proximity of Holyhead's out-of-centre stores. The existing retail floorspace is adequate to cater for this limited role and there is no need to allocate additional retail floorspace in the village.

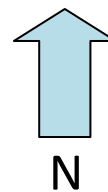
Plan 18: Retail Structure, Valley



Not to Scale

Source: Applied Planning survey, June 2012

© Crown copyright and database rights 2012
 Ordnance Survey 100023387



22 OTHER CENTRES

22.1 The household survey identified a number of other centres in the Study Area that attract significant levels of convenience goods expenditure. These centres are performing a role in providing day-to-day facilities to local communities many of which are in remote locations. The Household survey indicates that the following centres each achieve over £0.5m per annum convenience expenditure from local residents. This compares with Abersoch, Gaerwen, Rhosneigr and Cemaes all of which attract less than £1m per annum convenience expenditure from local residents. Beaumaris, Criccieth, Nefyn, Penrhyndeudraeth and Valley all of which achieve less than £2m. However retail assessments are not suited to small centres because of the low number of respondents identifying these centres for some of their shopping trips and these results should be treated with caution.

Table 3: Other Centres Convenience Turnover

Centre	Turnover £m
Centres within JLDP area:	
Llanerchymedd	0.53
Llangoed	0.65
Y Felinheli	1.05
Bethel (Gwynedd)	0.74
Llanrug	0.85
Bontnewydd	0.77
Tudweiliog	0.75
Snowdonia NP	
Aberdovey	0.49
Betws-y-Coed	0.62
Harlech	1.31
Trawsfyndd	0.83
Bala	4.91
Dolgellau	7.32
Conwy:	
Llanfairfechan	2.32
Penmaenmawr	1.08
Powys	
Machynlleth	9.78
Ceridigion	
Borth	0.66