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

Gwynedd and Anglesey Retail Study

Volume 3: Conclusions and Recommendations

February 2013

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1 GENERAL

1.1 This Study has been commissioned by Gwynedd Council and the Isle of Anglesey County Council to quantify retail requirements and inform the retail policies of the emerging Joint Local Development Plan (JLDP). The Plan will have to conform with the Welsh Government's objectives for retailing and town centres as set out in Planning Policy Wales (Edition 5). These are to:

- secure accessible, efficient, competitive and innovative retail provision for all the communities of Wales, in both urban and rural areas;
- promote established town, district, local and village centres as the most appropriate locations for retailing, leisure and other complementary functions;
- enhance the vitality, attractiveness and viability of town, district, local and village centres; and
- to promote access to these centres by public transport, walking and cycling.

It goes on to require that Development plans should:

- establish the strategic role to be performed by the main centres in the retail hierarchy;
- set out measures to reinvigorate particular centres, as appropriate;
- set out detailed policies to achieve vital, attractive and viable centres;
- allocate sites for new retail and leisure facilities and other uses best located in town centres, where there is assessed to be a quantitative or qualitative need using the sequential approach;
- include a criteria based policy against which proposals coming forward on unallocated sites can be judged; and
- set out policies for primary and secondary frontages, where appropriate.

1.2 Volume 1 of this Study assesses the larger centres of Bangor, Caernarfon, Pwllheli, Porthmadog, Holyhead and Llangefni. In terms of the retail hierarchy, Bangor is a sub-regional centre and provides higher order retail services for much of the JLDP area. These centres have significant catchment areas which include the Local Centres considered in Volume 2 of the Study. The larger centres all have at least one major supermarket providing for bulk, mainly car borne, shopping as well as more regular top-up shopping trips. These centres also contain a range of services and comparison goods shops. Both Bangor and Holyhead have large out-of-centre retail warehouse developments selling both bulky and non-bulky products.

1.3 The need for additional retail floorspace in these larger centres over the Plan period to 2026 is summarised in the table below.

	Comparison Floorspace net sq.m.	Convenience Floorspace net sq.m.
Bangor	7,913	NIL
Holyhead	NIL	NIL
Caernarfon	176	200
Pwllheli	772	172
Porthmadog	NIL	NIL
Llangefni	492	NIL

1.4 With the exception of modest amounts of floorspace required in Caernarfon and Pwllheli, which could be accommodated within the existing town centres or possibly by extensions to existing stores, there is no identified need for additional convenience goods floorspace. We are of the view that the Plan can best deal with convenience retailing through criteria based policies consistent with the prevailing Planning Policy Wales.

1.5 There is a clearer need for additional floorspace for the sale of comparison goods in Llangefni, Pwllheli, Caernarfon and, in particular, Bangor. Following Planning Policy Wales' requirement for a sequential 'town centre first' approach and for local authorities to plan positively we recommend that the Plan should identify suitable sites within the town centres to accommodate this growth.

2 BANGOR

2.1 Bangor is the only sub regional centre in Gwynedd and dominates the retail market within the JLDP area. The main competition to Bangor is Llandudno. The Study shows that the City is healthy and, once the current vacant floorspace primarily in the Menai Centre has been occupied, there will be a need for additional comparison goods floorspace amounting to 912 sq.m. net in 2016 rising to 7,913 sq.m. by the end of the plan period. Whilst there is no immediate need, the lengthily lead-in period means that potential sites should be identified as part of the JLDP process.

2.2 Bangor's shopping centre is essentially linear and its form is constrained by high ground towards the east. Plan 1 shows what we consider to be the Core Retail Area. Within this area we recommend that A1 uses are retained at their present level and that changes of use to other Use Classes should be resisted. Those areas of High Street to the north and south of the Core Retail Area could accommodate any further demand for A2 and A3 premises where a lower proportion of A1 uses would be acceptable.

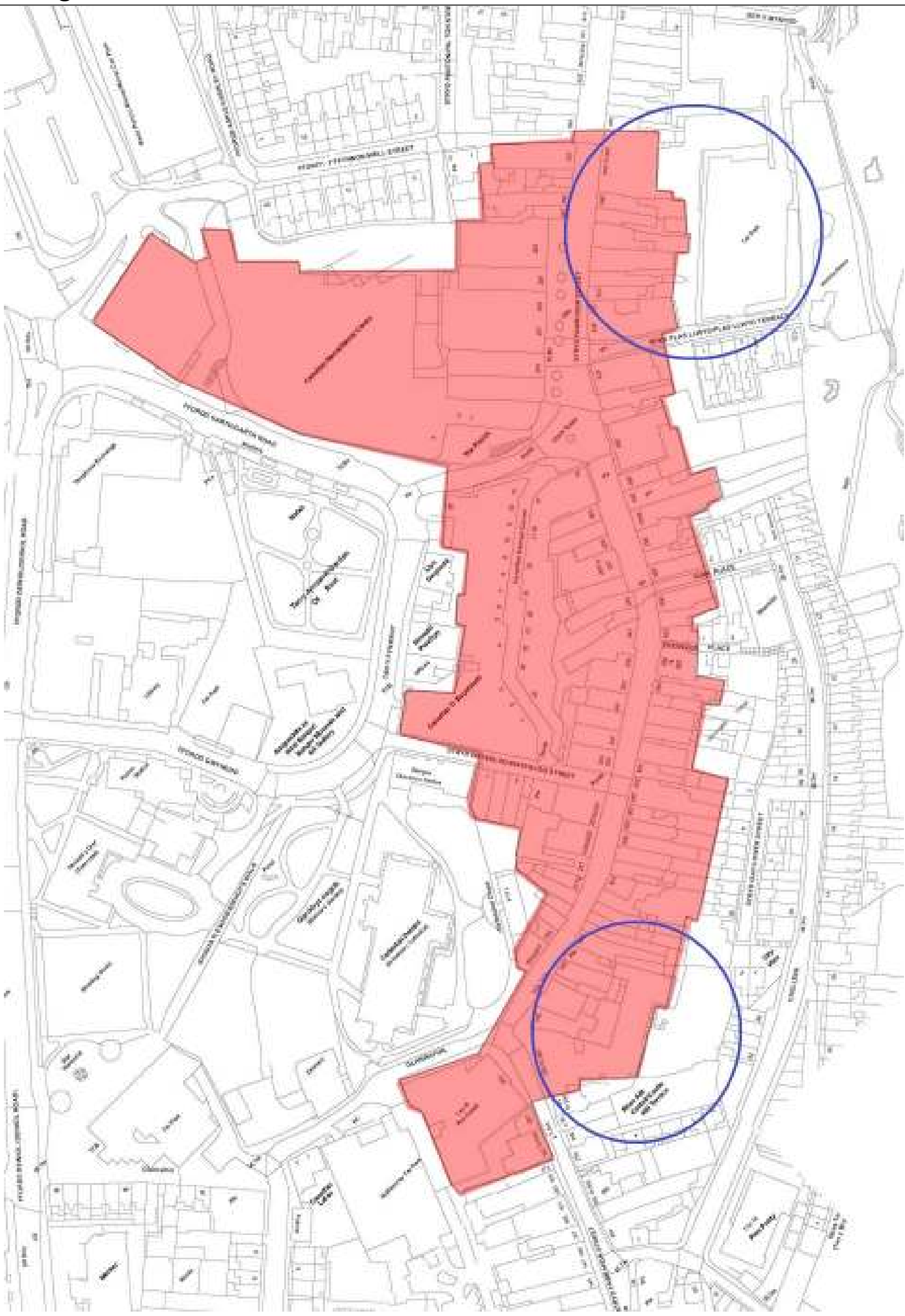
2.3 We take the view that this linear form should not be extended by development to the north or south. Future schemes will almost certainly require some redevelopment of existing property much in the same way as the Deiniol and more recent Menai shopping centres have been developed.

2.4 In accordance with PPW's sequential test, we suggest that the area around the former Debenhams store would be worthy of evaluation as there is the potential to incorporate underutilised land and buildings to the rear and a new development in this location would strengthen and anchor the southern end of the High Street. Another potential site may be to the north of High Street between Plasllwyd Terrace and Mount Street. This area would relate well to the new Menai Centre, the shops towards Mount Street are secondary and the areas of public car parking to the east could be incorporated. These two areas are indicated by blue circles on Plan 1. In both cases the evaluation exercise would need to consider factors such as access and car parking as well as the views of existing owners, details of tenancies, and likely overall scheme viability.

2.5 Bangor has a good stock of out-of-centre retail floorspace which accommodates a range of retailers accounting for 36.7% of comparison good sales in the City. Whilst some of these retailers such as B&Q are 'bulky goods' businesses which usually need to be in out-of-centre locations, others are competing directly with town centre stores and the local authority should seek to avoid the continuation of this trend in order to safeguard the ongoing viability and vitality of the City Centre.

2.6 We are of the opinion that this stock of out-of-centre floorspace should be managed as far as possible so that those businesses that must be located in retail warehouses are accommodated, but outlets retailing products such as clothing and footwear should be, wherever possible, restricted to the town centre. It must be remembered that any new retail developments must attract trade from existing stores and centres.

Plan 1: Bangor Core Retail Area



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2.7 We are strongly of the opinion that trade to out-of-centre stores is already accounting for a high proportion of total trade and that any future growth in retail floorspace must only take place in the City Centre or, as a last resort in edge-of-centre locations where good linkages to the Core Area can be provided. Further expansion of out-of centre stores should be resisted and any exceptions should be carefully assessed to show where trade will be drawn from and what effect these diversions will have on existing businesses in Bangor City Centre as a whole and other centres in the Plan area.

3 HOLYHEAD

3.1 Holyhead presents the most challenging problems of all the centres surveyed in the Study area. Whilst the town is an important ferry terminal and is well served by the A5/A55 main roads and rail connections, it is otherwise isolated at the eastern side of the island. Its natural catchment area is therefore severely curtailed and the transportation routes which increase the town's accessibility to the heart of the island also make other centres such as Llangefni and, more particularly, Bangor accessible to Holyhead's target catchment area.

3.2 The Study shows that there is insufficient available expenditure to support the existing levels of retail floorspace. This could be addressed in the following ways:

- Increased demand as a result of population growth in the catchment area. From Table 4 in Volume 1 of the Study it can be seen that population in Zone 2 (Holyhead and surrounding area) is forecast to grow from 26,143 in 2012 to 26,537 in 2021, amounting to a growth of 1.5%.

- A change in catchment demographics which may result in increased spending or demand for different goods.

- Increased attraction of trade, usually as a result of improved facilities.

- Decreased trade leakage, again, usually as a result of improved facilities.

- A reduction in the amount of the retail floorspace.

3.3 The amount of population growth, even accounting for any effects of the new nuclear power station project, will be insufficient to redress the balance between the demand for goods and services and current levels of floorspace. Without a significant in-migration of population it is unlikely that there will be any significant change in the demographic make-up of the catchment population. In order to either attract more trade or reduce leakage to other centres, the attractiveness of Holyhead's retail offer and attractions would need to be significantly improved.

3.4 In our assessment of Holyhead in Volume 1 of the Study we acknowledge the efforts of the Council and other organisations such as the Plas Cybi Partnership in promoting the regeneration of the town and bringing empty shops back in to use and we suggested initiatives such as a Farmers Market to develop niche retailing in the town. However it is the case that businesses must be capable of achieving sufficient turnover to remain viable and it is a sad fact that there is insufficient available trade to support the current amount of floorspace; hence the high vacancy rates and poor quality of many remaining shops. Whilst there are concentrations of vacant properties in areas such as Victoria Terrace, other vacancies are scattered throughout the shopping centre which detract from the town having a coherent centre which is attractive to retailers and shoppers alike.

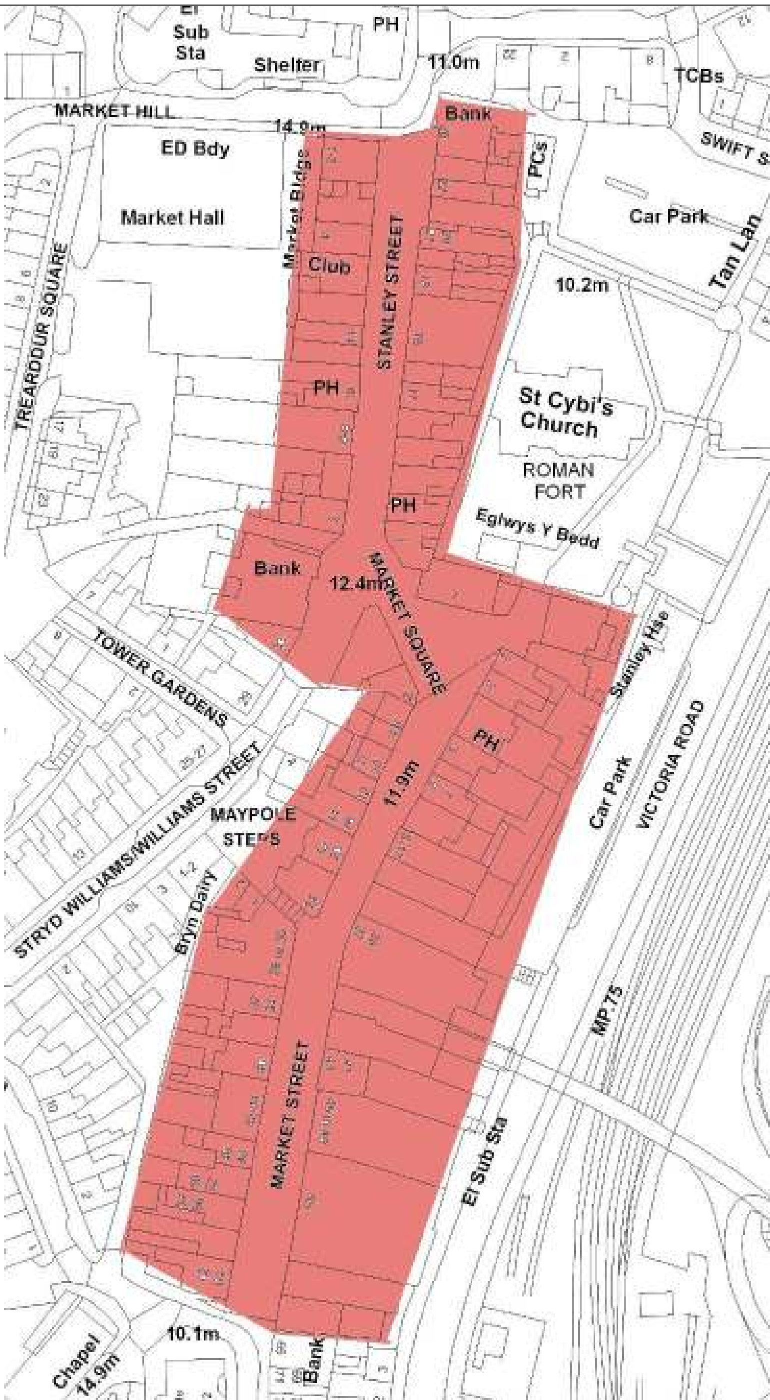
3.5 Consequently, our recommendation is to reduce the amount of retail floorspace in the town centre to a level commensurate with its current and projected role. By retrenching and concentrating the centre, those businesses should be able to derive sufficient levels of trade to remain viable and giving the centre a higher degree of vitality. This in turn, in the longer term, will attract better quality retailers and, through increased rental levels and lower investment yields, will encourage other redevelopments and attract more tourist expenditure to the town.

3.6 Clearly this would be difficult to manage and there would be a major challenge in finding new uses for the former retail units. Holyhead must develop new roles and redevelopment or renovations to provide new residential developments and commercial or leisure related uses should be encouraged.

3.7 We recommend that retail uses are concentrated in a proposed Core Retail Area as shown on Plan 2. Within this area A1 uses should be protected and proposed changes of use resisted. In other areas such as Stanley Street (north) and Boston Street, Williams Street and Victoria Terrace changes of use to business uses such as A2 (Financial and Professional Services) and A3 (Restaurants, Bars, Cafes and Take-Aways) should be encouraged although concentrations of daytime 'dead' frontages, which is often the case with Take-Aways, should be avoided. Opportunities to encourage residential uses in these areas should also be identified.

3.8 Clearly, given the existing over supply of retail floorspace and the delicate state of the town centre, no new out-of-centre or edge-of-centre retail development including extensions to existing uses should be allowed. We anticipate that during the Plan Period out-of-centre mixed-use and regeneration based schemes will be proposed. In those instances the Council will need to carefully weigh the benefits of such schemes against the harm that further trade deflection may cause to the town centre.

Plan 2: Holyhead Core Retail Area



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4 CAERNARFON

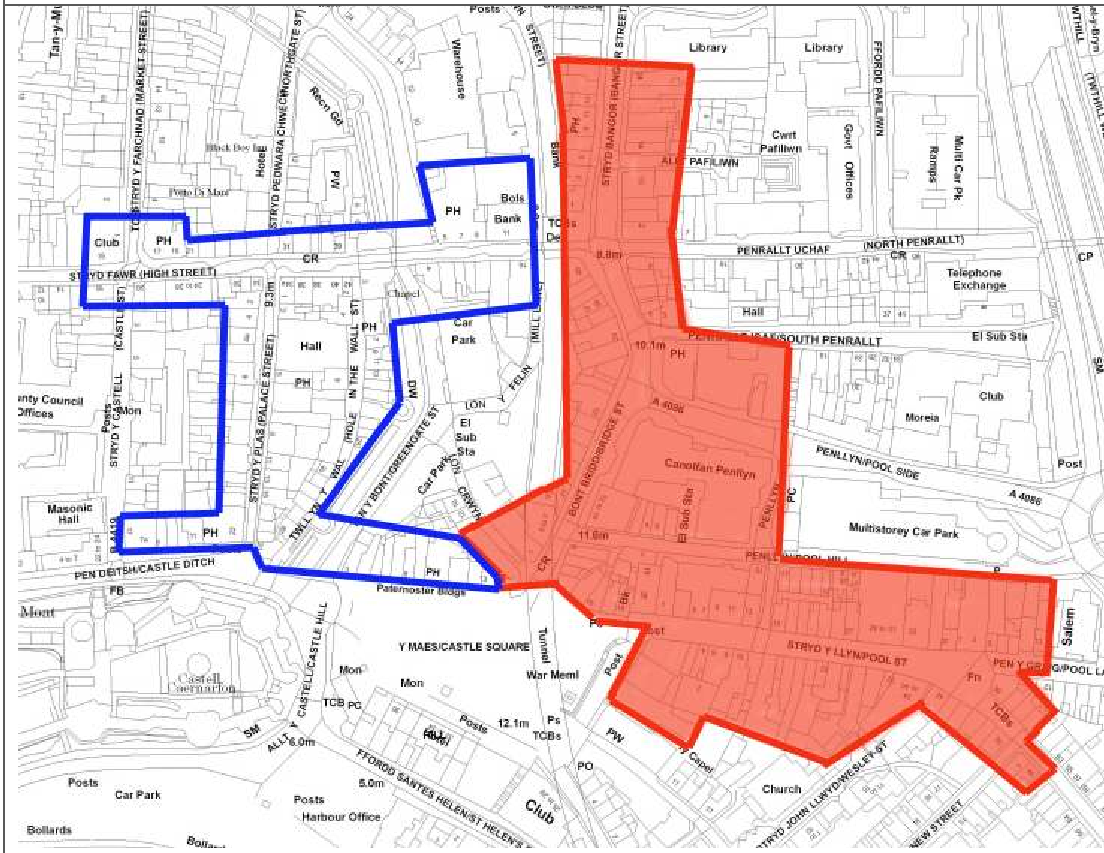
4.1 Caernarfon's retail role is limited due to the proximity and easy access to Bangor. The town does however provide services for a large catchment area to the south and has a well established role as a destination for tourists. We are of the opinion that the town is underperforming slightly as a retail centre, particularly in terms of quality, and that the existing tourist market is not being fully exploited.

4.2 We have identified two distinct retail areas in Caernarfon. Plan 3 shows our recommended Core Retail Area coloured red which contains the main shopping streets. Within this area the existing proportion of A1 uses should be preserved and changes of use from A1 should be resisted in order to preserve the vitality of the main shopping area.

4.3 Premises in High Street, Hole in the Wall Street, Palace Street, Castle Ditch and the northern side of Castle Square contain some independent comparison shops along with the Market Hall and a variety of bars and restaurants. This area, shown edged blue on Plan 3, is close to Caernarfon's main tourist attraction, the Castle, and much is within the walled 'Old Town'. We consider that the existing mixed uses should be maintained and extended by criteria based policies to encourage the use of the ground floor of premises for A1, A2 and A3 uses. This area, which is largely dependent on leisure and tourism, complements the core area.

4.4 The analysis of need for additional retail floorspace in Volume 1 identifies no immediate requirement for additional retail floorspace but by the end of the Plan Period there will be a need for 176 sq.m. net of comparison goods trading floorspace and 200 sq.m. for convenience goods. We take the view that any development should be within or adjacent to the existing core retailing area identified on Plan 3 and that any planning applications for out-of-centre retail development should be resisted.

Plan 3: Caernarfon Core Retail Area



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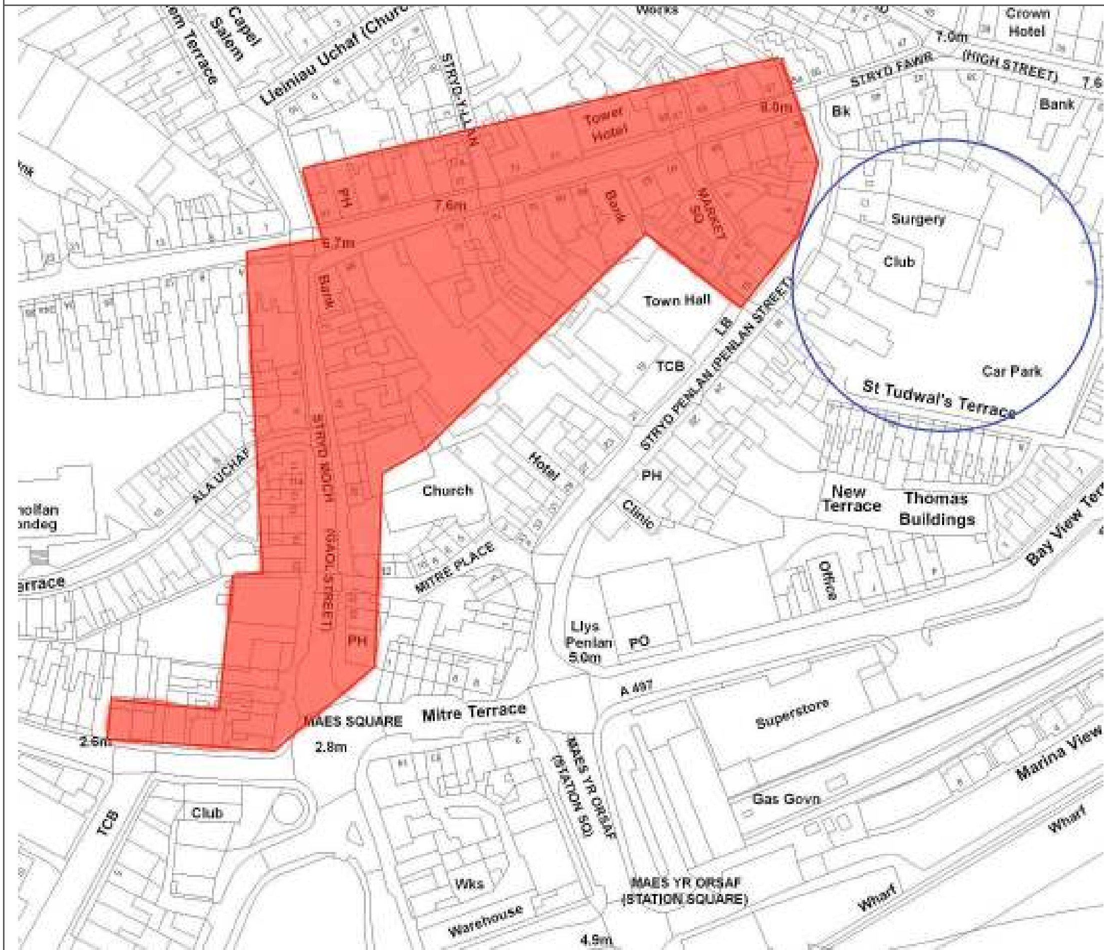
5 PWLLHELI

5.1 Pwllheli provides retail services for much of the Llyn Peninsula. The analysis in Volume 1 shows a healthy town centre with low vacancy rates. The town has no out-of-town retailing and the town has retained a good variety of independent retailers. The town is also a major resort and to some degree this will have an influence on the amount of floorspace required by bars, restaurants and take-aways as well as comparison shops catering for tourists. We therefore consider that A1 uses within the town's Retail Core Area as shown on Plan 4 should be protected from changes to other uses but, outside that area changes should be considered on their merits.

5.2 The Study concludes that there is no immediate need to increase comparison floorspace but there will be a requirement for an additional 772 sq.m. net trading floorspace in the later part of the Plan period. There is a modest need for additional convenience floorspace rising to 172 sq.m. net trading floorspace by the end of the Plan Period. Any new development should consolidate the existing pattern of development. We consider that the areas around Cardiff Road (north) or the redevelopment of the St Tudwell's Terrace Car Park and properties fronting Penlan Street circled blue on Plan 4 would be worthy of evaluation to assess their suitability in terms of access and car parking and their potential for viable redevelopment. Out-of-centre development should be resisted.

Plan 4: Pwllheli Core Retail Area



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6 PORTHMADOG

6.1 The conclusion to be drawn from the assessment of Porthmadog in Volume 1 of the Study is that it is a healthy centre containing a good range of quality retail facilities with a low level of vacancy. Taking in to account extant planning permissions at Penamser Industrial Estate we concluded that there is no need for additional retail floorspace in Porthmadog throughout the Plan period. We consider that the proportion of A1 uses within the town's Core Retail Area as shown on Plan 5 should be maintained and changes to other uses should be resisted. Changes of use from A1 to other uses for other properties on High Street could be considered on their merits particularly for uses such as cafes and restaurants which support the town's tourist role.

Plan 5: Porthmadog Core Retail Area

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Not to Scale

Source: Applied Planning

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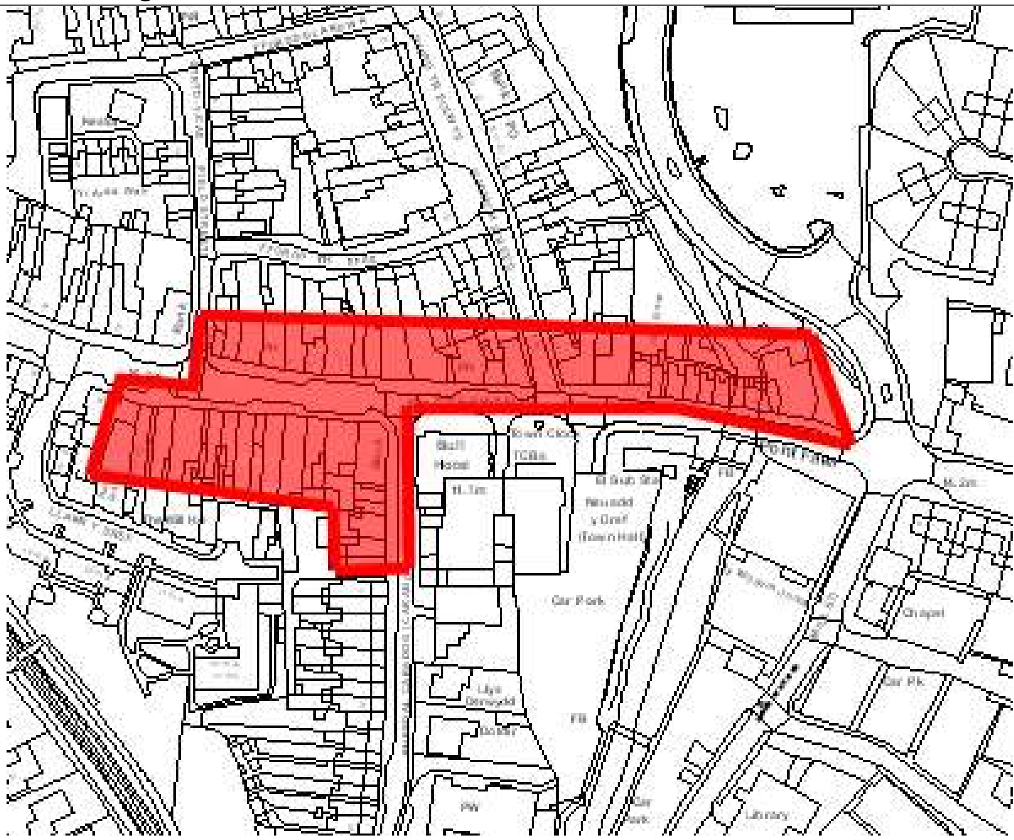
7 LLANGEFNI

7.1 Llangefni provides essential retail and other services for central Anglesey. The town gives the impression of having good levels of vitality and vacancy rates are low. However the range of shops, particularly those that could be considered higher quality, is limited. In terms of need, the Study assessed that there was no need for additional convenience floorspace throughout the Plan period whereas a small current need for additional comparison goods floorspace is projected to increase to 492 sq.m. net by 2026.

7.2 We consider that the current proportion of A1 in the Core Retail Area shown on Map 6 should be maintained and any proposed changes of use should be resisted. Outside this area applications should be judged on their own merit and new out-of-centre developments should be resisted.

Plan 6: Llangefni Core Retail Area



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8 LOCAL CENTRES

8.1 Volume 2 of the Study assesses the need for additional retail floorspace in 19 Local Centres within the Plan area. These centres vary in size and extent of the catchment area served but all provide essential basic services to their local communities. All have at least one convenience store and many have local services such as chemists, post office, hairdressers and hot food take-aways. The main requirement of retail planning policies for these settlements must be the retention of local services. In all cases, no new retail development should be allowed outside the prevailing retail centres. Applications for more than 250 sq.m. net trading floorspace within centres should be accompanied by a detailed impact assessment.

8.2 We have grouped the Local Centres as follows:

Large Local Centres

Barmouth (Abermaw)

Tywyn

8.3 Barmouth and Tywyn are the two largest Local Centres by floorspace and turnover. They are both relatively remote and therefore more independent of the higher order centres than the other Local Centres and both serve geographically large catchment areas. Both centres provide a reasonable level of service to their local communities and, in both cases, no quantitative need for additional retail floorspace was identified. Both towns have long linear retail centres and any future development should seek to consolidate rather than extend the centres. In the case of Barmouth there may be a case to improve the quality of retailing particularly with regards to convenience goods. A potential redevelopment site which may be worthy of assessment in terms of access, car parking and viability would be the single storey former Woolworths shop to the south of St Anne's Square now occupied by the Famous Factory Shop. We do not propose a defined Core Area for either town but In general the existing proportion of a1 uses should be maintained. Applications for changes of use from existing A1 uses should be resisted unless it could be clearly demonstrated that any future retail business would be unviable.

Vibrant Local Centres

Beaumaris

Criccieth

Menai Bridge

8.4 These centres all provide good levels of service to the local community. Some of the businesses provide a unique or quality offer which attracts expenditure from a wider area. No quantitative need or qualitative deficiency was identified. In all cases, new out-of-centre or edge-of-centre retail development should be resisted with any new development consolidating the retail centre and being shown to add to the centres vitality and overall viability. We do not propose a defined Core Area for centres but In general the existing proportion of a1 uses should be maintained. Applications for changes of use from existing A1 uses should be resisted unless it could be clearly demonstrated that any future retail business would be unviable.

Local Service Centres

Amlwch

Benllech

Llanfairpwll

Penygroes

Valley

8.5 These centres provide basic services to their local communities. Amlwch and Llanfairpwll are the larger centres with the turnover of the later being boosted by a large Co-operative store and the James Pringle Weaver Centre which clearly serve a greater area. Llanfairpwll, Penygroes and Valley lack coherent retail centres and Penygroes would benefit from a stronger convenience goods offer. With this exception, no quantitative need or qualitative deficiency was identified. In all cases, new out-of-centre or edge-of-centre retail development should be resisted with any new development consolidating the retail centre and being shown to add to the centres vitality and overall viability. Applications for changes of use from existing A1 uses should be resisted unless it can be demonstrated that any future retail business would be unviable.

Small Local Service Centres

Cemaes

Gaerwen

Penrhyndeudraeth

8.6 These three settlements provide limited facilities for the local communities. Gaerwen in particular has two small convenience stores, a hairdressers and little else. Being close to Llangefni it has no real role as a retail centre. All these centres would benefit from improved convenience goods retail facilities of an appropriate scale. In all cases, new out-of-centre or edge-of-centre retail development should be resisted with any new development consolidating the retail centre and being shown to add to the centres vitality and overall viability. Applications for changes of use from existing A1 uses should be resisted unless it can be demonstrated that any future retail business would be unviable.

Tourist Centres

Abersoch

Llanberis

Rhosneigr

8.7 The retail facilities in these three centres are heavily dependent on tourism whether catering for walkers in the case of Llanberis or the beach in the case of Abersoch and Rhosneigr where retail facilities for residents are poor. There is no identifiable quantitative need for additional retail floorspace.

8.8 New out-of-centre or edge-of-centre retail development should be resisted with any new development consolidating the retail centre and being shown to add to the centres vitality and overall viability. Applications for changes of use from existing A1 uses should be resisted unless it can be demonstrated that any future retail business would be unviable.

Failing Centres

Bethesda

Blaenau Ffestiniog

Nefyn

8.9 Both Bethesda and Blaenau Ffestiniog expanded in the late 19th Century to serve the local slate industries. As these industries have declined so has the population leaving a legacy of too much retail floorspace that can be supported viably by the local communities or through tourism. As with Holyhead, the retail centres currently being safeguarded in the adopted development plans would benefit from a reduction in size with Core Areas being identified to generate a stronger retail focus. In Blaenau Ffestiniog's case it would be sensible to concentrate the centre near to the railway station which is accessible from other parts of the town and to tourists.

8.10 Areas of Bethesda and Blaenau Ffestiniog should be identified where applications for changes of use from existing A1 uses should be resisted unless it can be demonstrated that any future retail business would be unviable. In other parts, changes of use should be encouraged to reduce vacancy and the risk of dereliction.

8.11 Nefyn also has the characteristics of a struggling centre with relatively high vacancy rates and a centre of low attraction. There is no identifiable quantitative need for additional retail floorspace and all cases, new out-of-centre or edge-of-centre retail development should be resisted with any new development consolidating the retail centre and being shown to add to the centres vitality and overall viability. We are of the opinion that it is important to safeguard in particular convenience stores and key local services such as the Post Office and the shops remaining in A1 use should be protected unless it can be demonstrated that any future retail business would be unviable.