Topic Paper 7: Retail

CYNGOR SIR YNYS MÔN ISLE OF ANGLESEY COUNTY COUNCIL

Background

This is one of a range of emerging papers prepared to offer information that is more detailed and explain the approach of the plan to different topics and issues affecting the Joint Local Development Plan Area. This paper will look specifically at Retailing. It will explain the background, which will help to identify the issues, objectives, options and the preferred strategy for the Preferred Strategy document, which is the first draft of the Plan. The paper will be developed as the preparation of the Deposit Plan (which will be the full Plan) proceeds and a final version will be published at the Deposit stage.

The Preferred Strategy document is the **first statutory stage** of the Joint Local Development Plan (JLDP). The JLDP shapes the future growth of communities in the Joint Local Development Plan Area and will set out the policies and land allocations against which planning applications will be assessed.

The Preferred Strategy version of the Plan is also an important opportunity to comment on the strategies that will shape the final Deposit Plan. The Deposit Plan is the **second statutory stage** of the plan and will allow a further period of formal public consultation. The Deposit Plan will be submitted to the Welsh Government, which will appoint an independent inspector to assess the soundness of the Plan in the Examination in Public. If the inspector considers the Plan to be sound, it will be recommended for adoption. When adopted the JLDP will supersede the Gwynedd Unitary Development Plan (2009) for the Gwynedd Local Planning Authority Area and the Gwynedd Structure Plan (1993) and Ynys Môn Local Plan (1996) for the Ynys Môn Local Planning Authority.

This Topic Paper can be read in isolation or in conjunction with the other Topic Papers and Background Papers that have been prepared to give a full picture the Joint Local Development Plan Area

If you have any comments on this Topic Paper, they can be submitted by email to planningpolicy@gwynedd.gov.uk. or in writing to:

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Comments should be structured in that they:
(i) clearly state which document and which part of that document e.g. paragraph, figure or map, that it relates too;

(ii) Specify the change required; and

(iii) Provide justification for this change.

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1.0 INTRODUCTION

1.1 The purpose of this topic paper is to provide information on the topic of retailing. It will explain the background which will help to identify the issues, objectives, options and the Preferred Strategy. It will outline the national planning policy context and identify the main trends in retailing, highlighting implications for existing retail centres within the study area. The Study Area excludes the area of Gwynedd located within the Snowdonia National Park, but will have regard to the wider area which depends on the centres within the Plan Area for some of the retailing needs and centres outside the Plan Area which attract spending from the Plan Area. It will take account of the retail policies of the neighbouring Local Planning Authorities.

1.2 The Joint Planning Policy Unit (JPPU) commissioned Applied Planning Consultants in 2012 to undertake a retail study to contribute to the evidence base that underpins the Joint Local Development Plan. The Applied Planning Study examined the existing flows for various goods type to stores and centres within and beyond the Study Area and surveyed each significant centre to ascertain how well each meets these demands within the region's hierarchy. The need for additional floorspace requirements to meet this demand was quantified throughout the plan period up to 2026.

1.3 The information derived from the above Study will be used to inform the proposed retail policies included within the Joint Local Development Plan.

1.4 The findings from the above Study can be used to further assess the following issues:-

- Identify the function of town centres in Anglesey and Gwynedd, and try and predict what their function will be in the future
- Try and identify whether there is an obvious hierarchy of retail centres
- Assess the vitality and viability of the centres
- Identify shopping centre boundaries – is there a need to review town centre boundaries that are included in the Gwynedd Unitary Development Plan and the Retail Core of the Ynys Môn Local Plan and stopped Unitary Development Plan?

1.5 Any policies that result from this research must comply with the principles of **Planning Policy Wales (PPW)** (Edition 5, 2012). **PPW** provides the land use policy framework for local planning authorities in order to ensure that the development plans are prepared effectively. This National Planning Policy is supported by a series of

Technical Advice Notes (TANs). The relevant Technical Advice Note that relates to retailing is **TAN 4** Retailing and Town Centres (1996).

2. 0 NATIONAL + REGIONAL POLICY BACKGROUND

2.1 The Wales Spatial Plan (amended version, 2008) provides a framework which notes the national agenda for ensuring that local strategies include principles that will ensure that the communities of Wales are sustainable during the next 20 years. One of the main visions of the Spatial Plan is the need to sustain our communities and attempt to resolve problems that derive from economic changes as well as changes in the population. It is also considered important that all corners of Wales benefit from potential economic investment, ensuring that all areas of Anglesey and Gwynedd are as prosperous as each other.

2.2 There are five specific principles that the Spatial Plan promote, namely:-

- Building Sustainable Communities
- Promoting a Sustainable Economy
- Valuing our environment
- Achieving sustainable accessibility
- Respecting distinctiveness

2.3 Wales is divided into specific areas within the Spatial Plan in accordance with the connection of specific areas with the wider area. Anglesey along with the northern part of Gwynedd is identified as part of the ‘North West Wales’ area, whilst the south of Gwynedd is identified as part of the 'Mid Wales’ area. Within the Spatial Plan, there are settlements which are recognised as serving a specific role and function, which are as follows:-

Settlement Classification	Location
Key settlement of national importance	Bangor
Primary key settlement	Llangefni, Holyhead, Caernarfon, Pwllheli and Porthmadog
Cross-boundary settlements	Blaenau Ffestiniog and Penrhyndeudraeth
Key settlements	Amlwch, Beaumaris, Bethesda, Llanberis, Penygroes, Nefyn, Abermaw & Tywyn

2.4 The part of Gwynedd that is identified as part of the 'Mid Wales' area is also considered to be a 'tourism hub'. It is recognised that one of the main problems of this area is the lack of access to public transport, which can lead to low living and working standards as a result of the lack of accessibility to services and jobs.

2.5 The Wales Spatial Plan recognises the importance of the cluster of large towns located either side of the Menai Strait (referred to as the Menai hub). A critical priority for North West Wales is to ensure that the two principal hubs of Menai and Llandudno are functioning to the best of their potential. The secondary hubs of Holyhead, Porthmadog, Pwllheli, and Penrhyndeudraeth are recognised as being key growth settlements, which should focus on providing services and employment and building on established strengths to spread prosperity to the wider rural hinterland. The Spatial Plan places emphasis on Bangor's role as a retail destination, by identifying it as a 'key settlement of national importance'.

2.6 The Spatial Plan describes the role of Bangor as follows:-

"Bangor has a strong commercial offering and should become a vibrant retail destination for residents from a wide catchment area extending to Pen Llŷn and Anglesey".

2.7 The Spatial Plan recognises Llangefni as the principal market town and administrative centre whose development is seen as an important socio-economic driver for the whole island. Due to the town centre improvements which are ongoing it is recognised as an important centre for retail and commercial employment.

2.8 The Action Plan 'Closing the Gap: North West Wales Spatial Development Strategy' (July 2009) was drawn up jointly between partners that include Anglesey County Council, Gwynedd Council and Conwy County Borough Council. This strategy outlines how the policies and objectives of the Wales Spatial Plan (2009) will be achieved in North West Wales by influencing future financial planning, local policies and initiatives. The strategy notes that the current economic situation has led to the area losing a number of jobs, and when this paper was written, the most badly-affected work sectors were retail, production and construction. In terms of retail, the main concern is trying to determine how to improve and increase the range and value of retail opportunities in the North West Wales area in light of the current economic recession. In order to overcome this problem, it is considered that employment opportunities deriving from existing enterprises will need to be developed, or that new enterprises will need to be attracted, ensuring that there are a wider range of opportunities available for leisure and retail jobs. It is also noted that there is a need to consider locating new economic enterprises of a suitable scale outside the primary settlements so that rural enterprises can flourish and contribute towards economic development. Furthermore, reference is made to the fact that retailing in the North West Wales area is confined to the northern coast, and that there is a lack of connection with the physical environment within the commercial centres.

2.9 The Welsh Government's regeneration policies encompass a range of integrated activities which aim to reverse economic, social and physical decline in order to achieve lasting improvements in areas where market forces will not be sufficient to achieve this without some support from government. Successful town centres is listed as one of the national outcomes in the Welsh Government Document - Vibrant and Viable Places New Regeneration Framework (2013). The framework recognises that consumer patterns of behaviour are changing permanently in favour of out-of-town and internet shopping, creating a fundamental challenge to the retail-dominated role of town centres

2.10 **Chapter 10 of Planning Policy Wales (Edition 5, 2012)** – 'Planning for retail and town centres' notes that it is important that retail provisions are accessible, efficient, competitive and innovative. It is also important to try and promote established town centres as the most appropriate locations for successful retailing that support existing communities and centres. National objectives seek to enhance the vitality, attractiveness and viability of town, district local and village centres and promote access to these centres by public transport, walking and cycling. When considering town centre developments, it is necessary to ensure that they are convenient and easy to reach, and also to determine whether there is demand for such developments. Furthermore, paragraph 10.2.1 of PPW notes how development plans should establish the hierarchy of centres based on their existing function and explain what their specialist roles are. It is also suggested that there could be circumstances where consideration should be given to extending the boundaries of town or city centres in accordance with the demand for doing so.

2.11 The relevant Technical Advice Note that relates to retail is TAN 4 Retailing and Town Centres (1996). This TAN will be an important consideration when forming retail policies in the LDP. It provides guidance on the applicability of national policy statements to LDP's and which national policies should be considered for inclusion in topic based LDP policies and which national development control policies should not need to be repeated as local policies in the LDP.

3.0 LOCAL PLANNING POLICY CONTEXT

GWYNEDD LOCAL AUTHORITY AREA

The Gwynedd Unitary Development Plan (2009)

3.1 The Gwynedd Unitary Development Plan (2009) established a policy framework for development needs for the period from 2001 to 2016. It will be used by Gwynedd Council to guide and control development until the JLDP is adopted.

3.2 Whilst policies D22- D32 provide guidance on land use planning related to providing land or adapting existing buildings for shopping and commercial uses in town centres and villages, it is important to emphasise that these policies should not be read in isolation to other policies within the Plan.

3.3 The relevant Gwynedd Unitary Development Plan Policies are as follows:-

Policy D22 (New Development within defined town centres).

Policy D23 (Change of Use of ground floor units in the following town centres: Bangor, Caernarfon, Porthmadog and Pwllheli)

Policy D24 (Change of Use of Ground Floor Units within defined town centres in Abermaw, Bethesda, Blaenau Ffestiniog, Criccieth, Llanberis, Nefyn, Penrhyndeudraeth, Penygroes and Tywyn to non-retail uses)

Policy D25 (Hot food take-away developments)

Policy D26 (Shops in residential areas within the development boundaries of centres)

Policy D27 (Comparison and convenience goods retail stores outside defined town centres)

Policy D28 (Safeguarding village shops and public houses)

Policy D29 (New shops in villages)

Policy D30 (Retailing in the countryside)

Policy D31 (Retailing from industrial units)

Policy D32 (Car boot sales and markets)

ANGLESEY LOCAL PLANNING AUTHORITY AREA

3.4 The current development plan for the Isle of Anglesey is the Gwynedd Structure Plan (adopted 1993) and the Ynys Môn Local Plan (adopted 1996). The Ynys Môn Unitary Development Plan was formally stopped at a late stage in the preparation process (December 2005). Material weight should therefore also be afforded to this document.

Gwynedd Structure Plan (1993)

3.5 The following policies of the Gwynedd Structure Plan are still relevant to retail planning on Anglesey:-

Policy E1 (New retail developments and redevelopments in existing towns). This policy states that new retail developments and redevelopment in existing town centres will be permitted if such development enhances their retail strength and does not overwhelm the traditional shopping centre.

Policy E2 (support Llandudno and Bangor's role as major shopping centres). This policy supports major retail developments and redevelopments in these centres.

Policy E3 (Large scale retail developments). Retail developments that by their scale and activity cannot be accommodated within existing centres will be permitted in other locations, provided their design and scale are acceptable, they do not have a detrimental effect on existing vitality and viability, and do not reduce the amount of land available for industrial use.

Policy E4 (Shopping developments at sites in open countryside will not be permitted).

Ynys Môn Local Plan (1996)

3.6 The following policies of the Ynys Môn Local Plan (1996) are relevant to retail planning in Anglesey:-

Policy 1 (General Policy)

Policy 18 (Council will permit applications for new shops in existing shopping centres)

Policy 19 (Retailing outside existing shopping centres will be permitted when certain criteria are satisfied)

Policy 20 (Primary Shopping Frontage)

Policy 21 (Hot Food Take-aways)

Ynys Môn Stopped Unitary Development Plan (2005)

3.7 The following policies of the Ynys Môn Stopped Unitary Development Plan (2005) are relevant to retail planning in Anglesey:-

EP8 (Vibrant Town, District and Local Centres)

EP(Retailing outside Existing Centres)

EP10 (Retail Core)

EP12 (Village Shop)

EP13 (Hot Food Takeaways)

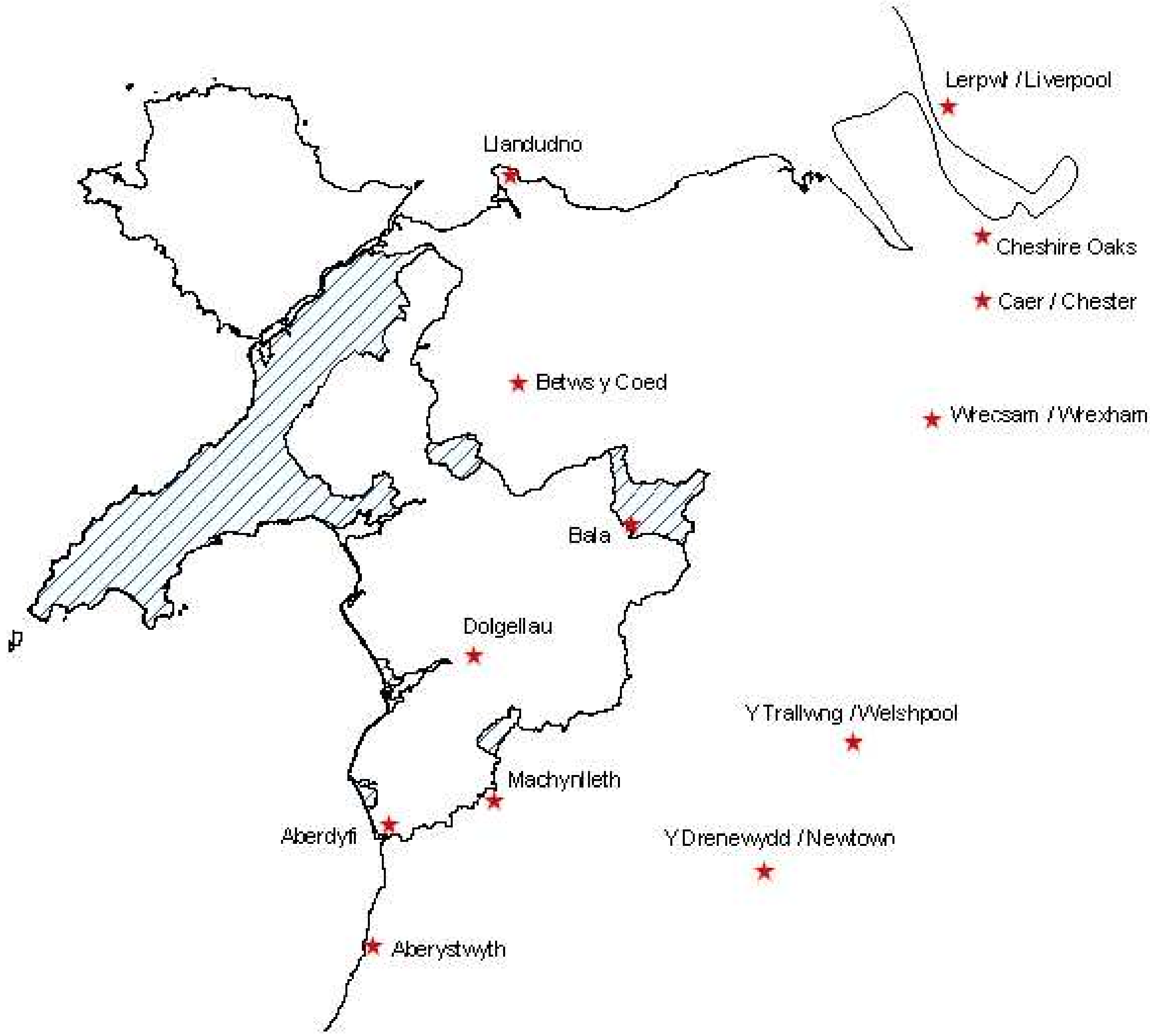
3.8 Whilst the above policies provide the existing local land use planning guidance regarding the provision of retailing on Anglesey, it is important to emphasise that these policies should not be read in isolation to other local planning policies.

4.0 RETAIL POLICIES OF NEARBY LOCAL PLANNING AUTHORITIES

4.1 Many residents from the JLDP area sometimes shop in settlements that are outside the Counties' boundaries. It is useful to see what the vision of relevant local planning authorities is for those settlements. The retail policies included in the following Development Plans were inspected, namely the most recent development plans for the relevant planning authorities that border with the Anglesey and Gwynedd Planning Authority areas:-

- Powys Unitary Development Plan (Proposed Amendments)
- Conwy Local Development Plan (Deposit version)
- Eryri Local Development Plan (Adopted 13 July 2011)
- Denbighshire Local Development Plan (Deposit version)

4.2 The following map shows the settlements that are identified as the main shopping centres in another development plan's shopping hierarchy, and which are popular towns with the residents of the Anglesey and Gwynedd Planning Authority area. These areas are highlighted in particular because of the traditional retail links that exist between the residents of the Anglesey and Gwynedd Planning Authority area and the settlements that are referred to.



Nodiant / Notation

★ Canolfannau manwerthu tu allan i Awdurdod Cynllunio Gwynedd ac Ynys Môn
Key retail centres outside Gwynedd and Anglesey Planning Authority Area

▨ Ardal Awdurdod Cynllunio Gwynedd
Gwynedd Planning Authority Area

4.3 The retail policies included in the aforementioned development plans reflect the national planning policy guidance by identifying settlement hierarchy as the basis for guiding retail developments in the future. The policies are also based on recent retail studies carried out by or on behalf of the relevant Authority. All the plans identify the primary shopping centres along with the town centre areas on the relevant proposal maps in order to give a clear guidance of what type of developments are permitted, and where. There is also emphasis on the need to improve and protect existing retail centres as well as the need to ensure that expenditure remains within the local economy.

4.4 Although there are consistent elements in the contents of the local authorities' retail policies, there are also considerable differences that are based on the main economic drivers of individual local areas. For example, one of the main considerations in the Eryri Local Development Plan's retail policies is the need to ensure a balance between local requirements and the requirements of visitors to the area. In light of this, it is emphasised that retail developments should reinforce the local economy.

4.5 The draft policies of Denbighshire Council, on the other hand, focus on trying to ensure the regeneration of Rhyl, and the need to re-establish it as the main shopping centre in the local area. Consequently, no applications that would lead to losing a shop (i.e. Class A1) from Rhyl town centre will be permitted.

5.0 THE CURRENT CONTEXT

NATIONAL

5.1 The GENECON Report (2011) provides a useful review of the available research and analysis of the drivers and barriers which impact on the economic and social performance of high streets in Great Britain. The study is intended to inform central and local government decision making regarding town centres, high streets and economic growth. This Report provided a key input to the independent review of the future of high streets and town centres led by Mary Portas (2011). Whereas the Portas Review makes 28 recommendations to free up the high street from constraints, to level the playing field, to mobilise landlords and give the consumer a voice in the process, only the following are considered to be directly relevant to land use planning:-

- Focus on making High Streets accessible and safe
- Address the restrictive aspects of the Use Class System to make it easier to change the uses of key properties on the high street (new regulation required)
- Put betting shops into a separate 'Use Class' of their own (new regulation required)
- Strengthen the presumption in favour of town centre retail development (new National Policy Planning Guidance required)

Regard can only be taken of the first listed bullet point as the other bullet points require changes in national planning regulation and national policy.

5.2 The main findings of the GENECON Report are summarised below:-

The literature on high streets is sizeable and diverse. In order to provide a systematic approach to analysis, GENECON developed a bespoke analytical framework based on the PESTLE (**P**olitical, **E**conomic, **S**ocial **T**echnological, **L**egal and **E**nvironmental) model to review the evidence. The framework included consideration of:-

- **Externalities** (factors generally outside the control of the user/occupier), for example the national recession/loss of consumer confidence or centralised decision making by property owners retailers as well as micro economic issues such as the loss of a major employer and the consequential impact on a local area.

- **Spatial and physical factors** high street performance can be affected by factors such as development of new residential areas, changes in approaches to the physical environment, accessibility related to car access and car parking and amenity in terms of streetscape, public space and private/public space. The Welsh Local Government Association consider that the development of out-of-town retail sites has had a detrimental effect on many town centres

- **Market forces and competition** the development of the High Street/Town Centre can be affected by the emergence presence of competitive offers to existing centres through a range of channels such as the growth in internet shopping. In recent years, substantial changes have been seen in people's shopping habits, with an increasing number of people purchasing goods online. The increasing popularity of this method of purchasing is to the detriment of small local shops which are unable to compete with companies that sell online. One of the main advantages for companies that sell goods online is fewer of the overheads that are usually associated with retail units.

- **Demographics** e.g. changing demographic trends such as ageing population or transient student populations and the socioeconomic catchment/level of disposal income.

- **Regulation and legislation** a range of regulatory and legislative policy initiatives have impacted on town centres /high streets including planning policy, licensing and introduction of financial incentives.

- **Management** e.g. management of town centres has the potential to affect change in high streets.

5.3 **Recent High Street Changes and trends** Over the last 10 years or so, both the UK economy and its retail market have experienced significant change. Whilst the recent economic recession has had a great impact, a long term structural change in the way people shop has been occurring as a result of ongoing change in consumer behaviour, technological advances and the emergence and growth of new out of centre retail developments and other shopping formats.

Key findings

- Since the second half of 2008 the UK has suffered from economic recession. It is likely that some effects will continue to be obvious for many years to come. Because of the economic recession, people have lost their jobs and there is a continuing threat of job losses because of the fragile position of many businesses.

- The recession has not affected all types of retailers to the same degree. Research undertaken by the Local Data Company on retail in the UK referred to the types of retailers that suffered as a result of the recession during the first nine months in 2009. During the survey period, 18% of clothing and children shops had closed down and 15% of independent clothing shops had closed. One of the main types of retailers affected was florists. However, although this picture is quite negative, some types of town centre retailers have thrived during this difficult time, such as pound shops, cafes and fast food outlets.

- There are many examples of weak and vulnerable high streets throughout Wales that are blighted by empty premises and poor shopping environments. Vacant premises in Welsh town centres stand at 11.5% which is above the UK average of 11.1% although footfall appears to have countered the UK trend and is up by 1.8% compared with a year ago (British Retail Consortium November 2011).

- The data available to quantify economic performance/health of the high street are pertinent to town centre level (or above) but rarely below – even in local studies.

- High Street/town centre performance tends to be considered primarily by retail performance. Whilst recognising that this does not adequately reflect the diversity of the high street, this is the most practical approach given the constraints of the data available.

- Over the past decade consumers have become more mobile and their attitudes and preferences have changed – they now seek more ‘experience and a greater choice. As a result trips are now longer, many are made beyond local centres – but fewer in number. Accordingly there has been a steady stream of retail activity to the larger destinations – in terms of trips, spends and stores.

- Growing popularity of online shopping

- The period 1998-2009 saw Great Britain's population grow by 3.3 million (5'8%) which gave a boost to annual comparison goods spending of about £10 billion over the period. However the majority of this increase in expenditure has been due to growth in out of town centres rather than in town centres.

- Retail Centres within the Joint LDP Area are located in the larger towns; although retail provision in the smaller settlements are of importance locally and should be preserved as far as possible to assist with the delivery of sustainable development.

- The retention of local post offices, village shops and petrol stations selling convenience goods are often of paramount importance in more remote rural locations where there is often a lack of alternative provision and comparatively low population densities to sustain rural communities.

- Tourism is a key component in certain parts of the areas retail provision. Settlements such as Abermaw, Abersoch, Caernarfon and Beaumaris rely on tourism to provide a significant proportion of their retail income.

5.4 In 2012 the National Assembly for Wales Enterprise and Business Committee produced a report regarding regeneration of town centres. The wide ranging terms of reference of the research included investigating what approaches have been followed to successfully deliver and finance the regeneration of town centres in Wales and considered if there are lessons to be learnt from elsewhere. Of the 21 recommendations to the Welsh Government only the following two recommendations are of direct relevance to Local Planning Authorities and the preparation of Local Development Plans.

Recommendation 5 LPA's should be encouraged within their LDP's to see office and work place development as a means of increasing footfall within town centres and that they should assess the possible outcomes of, and alternatives to, out-of-town office development more carefully.

Recommendation 13 Within the LDP framework each town should have a comprehensive plan prepared in partnership with key stakeholders and engaging the local community which contains actions for addressing the issues affecting the viability of town centres.

LOCAL CONTEXT – GWYNEDD

5.5 During February 2009, the Gwynedd Council's Research Unit examined the impact of the credit crunch on Gwynedd retailers. According to some Gwynedd retailers, it was too early to attempt to assess the impact of the credit crunch on their businesses and that it could be determined in time. The credit crunch was not the only factor responsible for the decline in business and consideration should also be given to other destructive factors such as:-

- Parking prices
- Traffic management systems
- Untidiness of town centres
- Business rates and high rents causing problems and rather than reflecting the value of the property, they should reflect the businesses' financial turnover
- Some smaller businesses find it hard to obtain credit, which means that it is not possible to bulk-buy goods; thus causing an increase in the price of goods being sold on to the consumers and shoppers

5.6 In May 2009, Gwynedd Council adopted the 'Gwynedd Working – Responding to the Recession' Action Plan in an attempt to ensure that Gwynedd would be in a stable economic position beyond the recession. In order to succeed with the attempts to mitigate the impact of the recession on the economy, there was a need to address short-term needs as well as long-term needs, based on a robust assessment of the impact of the recession on the area and knowledge of more recent trends as the situation developed.

5.7 As part of the Action Plan, a specific response field is identified for responding to the impacts of the recession on retail and town centres under the sub-heading 'Town Centres and the Retail Sector'. The measures proposed in order to respond to the recession include:-

- **Retail Support Pack**
- **Parking** (no increase in parking fees in Council-owned car parks)
- **Promoting town centres** (marketing and promoting market town centres and encouraging shoppers to spend more time in town centres)

- **Image of town centres** (strengthening image and increasing pride by undertaking maintenance work, encouraging the use of empty shop windows to display local produce, art work or promotional exhibitions)
- **Shop local campaign** (encouraging people to shop locally)
- **Encourage spending money locally**
- **Planning** (ensuring that planning policy promotes the viability of town centres and addresses the problem of empty shops in order to allow for a mixed use for living, working, enjoying and maintaining business)
- **Commercial success of town centres** (increasing capacity to support the local business forums in Gwynedd to increase commercial success)
- **Local produce** (promoting and supporting local produce)
- **Markets** (promoting the sale of local produce within the markets)

5.8 The recommendations are not ones that can be implemented overnight and they are likely to take considerable time before they are realised. The recommendations also call for the need to change people's mindsets in terms of their method of shopping, in particular when the disposable income of the population is so scarce.

5.9 Gwynedd Council's proposals of the regeneration and economy programmed for 2011-14 are set out in its Three Year Plan refer to specific projects to revitilise and improve the image of Town Centres. The project activities aim to bring people back to town centres by

- rationalising strengthening and developing the commercial areas in town centres.
- Encouraging reuse of empty buildings
- Improve the image and environment of town centres for shoppers and visitors
- Providing specialist and independent advice to individual retail businesses
- Marketing and promoting town centres as shopping destinations for their areas.

5.10 In an attempt to overcome and improve the current situation, regeneration plans will also play an important part. Blaenau Ffestiniog has received an investment of £4.5 million as part of the 'Blaenau Ffestiniog Urban Regeneration Plan'. It is hoped that this money will be a means of regenerating the town centre by protecting the culture and heritage of the town. Other regeneration initiatives are in the pipeline in other parts of Gwynedd also, such as the Hirael Bay, Bangor Plan and the Slate Quay, Caernarfon Plan. These plans may be a means of regenerating existing centres in an indirect way.

LOCAL CONTEXT – ANGLESEY

5.11 Unfortunately no comparable research to the Gwynedd Study on the impact of the credit crunch on Anglesey retailers has been undertaken.

5.12 Anglesey's Corporate Business Plan 2012-2015 sets out the Council's overarching vision and strategic work plan for the next three years and is underpinned by the following five key outcomes for its citizens and communities.

i. Anglesey has a thriving and prosperous rural economy

ii. People in Anglesey achieve their full potential

iii. People in Anglesey are healthy and safe

iv. People in Anglesey enjoy, protect and enhance their built and natural environment for future generations

v. People in Anglesey are proud of their Council.

5.13 The outcomes most relevant to the topic of retailing are outcomes i. and iv.

5.14 Anglesey Council has developed a regeneration programme for the main towns of Holyhead, Llangefni and Amlwch in order to attract more shoppers and increase footfall into these centres. This programme is supported by the European Union Convergence, Welsh Government and Heritage lottery Funding. The Three Towns programme fits into wider ongoing regeneration efforts which include various stakeholders and funding sources. The proposals include environmental improvements support for the redevelopment of vacant properties and improved town centre management measures including rebranding.

CURRENT SITUATION ANGLESEY AND GWYNEDD

5.15 There is a series of rural towns in Anglesey and Gwynedd that are comparatively small in size and they are mainly dominated by independent retailers or small local companies. Their main role is to serve the day to day needs of the residents of the settlement, along with the broader adjoining area. It is likely that these shops only provide a restricted element of the local residents' shopping needs which means that there is a continuing dependence on urban centres to satisfy the more varied / specialist shopping needs.

5.16 The importance of small towns or market towns has been highlighted in a research paper ‘Small Market Towns in Wales’[1] (2007) by the ‘Wales Rural Observatory’. This type of town is typical in rural Wales. Historically in Wales there have been settlements with populations of fewer than 2,000 inhabitants which were considered as towns; and thus they have been service centres for the local area. Contrary to towns in urban areas, market towns or small towns have a more important role and purpose as they are able to support a number of services and facilities with economic and social links with urban and rural areas.

5.15 The paper highlights that the success of some of Wales’ market towns and small towns has depended on receiving a financial investment from European funds in order to promote regeneration. This money comes from funds such as the ‘European Structural Fund’; this is the fund that provided ‘Objective 1’ funding. In Gwynedd, the investment received from European funds equates to £403 per head, namely the highest investment in Wales. Investing this money in an effective and sustainable way is critical in order to maintain the success of the rural towns of Gwynedd in the future.

5.16 The research paper concludes that it is possible to categorise market towns or small towns into different specific categories, according to their function. However, it is noted that these towns have obvious links because of the concentration of the economic, settlement, social and political functions of land in one place. It is acknowledged that although there are some out-of-town retail developments, such as Caernarfon Road, Bangor, that can be successful, environmental and sustainability issues can derive from them as a result of separating them from the employment, residential, retail and leisure link and the unavoidable need to use a car. As a concentration of services and functions are available in small towns, they are the most purposeful location in order to deliver this service in a sustainable way and are a means of offering employment opportunities in rural areas.

6. RETAILING IN GWYNEDD

6.1 Gwynedd has a population of 121,874 (Census 2011) and 52,473 households. Therefore, the average Gwynedd household size is 2.3 persons. 7,812 of Gwynedd's population worked in the 'Wholesale, retail and repairs' sector, namely 14.5% of the 53,961 jobs in Gwynedd in 2011' (ONS Industry). Out of the 75,300 people of working age in Gwynedd, 56,400 of them were economically active and 3,800 were unemployed. (Information based on the 2012 figures and from the Nomis website).

6.2 The main retail centre in Gwynedd and for the JLDP area is Bangor, due to its:-

- Status as a city of learning
- Accessibility to North Gwynedd and Anglesey which has national links with Ireland
- Links to the A55 corridor to the east of Wales and to North-west England
- Bangor also benefits from good public transport links as it is located along train routes that serve Wales and the remainder of Britain along with a good bus system which links Bangor to the remainder of Gwynedd and further afield.

6.3 In the Gwynedd Unitary Plan (2009), the hierarchy of shopping centres has been defined as follows:-

Sub-regional	Urban	Local
Bangor	Blaenau Ffestiniog Caernarfon Porthmadog Pwllheli	Abermaw Bethesda Criccieth Llanberis Nefyn Penrhyndeudraeth Penygroes Tywyn

6.4 Traditionally, the main towns of the Gwynedd Planning Area have an important role to play in meeting the various needs of the communities. A number of the towns are located along the coast (Caernarfon, Pwllheli, Porthmadog, Tywyn and Abermaw) and have inevitably thrived in recent times as tourist attractions.

6.5 There are no current unimplemented large retail planning applications in Gwynedd.

6.6 Supporting Retail Impact Assessments submitted with certain/larger planning applications for retail development provides a method of obtaining further information and gathering baseline information in relation to the current shopping provision.

6.7 Some of the findings of these Reports are as follows:-

Site Name	Date report published	Summary of the report's main points.
Gwynedd & Ynys Môn Retail Centres Study Final Report – prepared by Chesterton	January 2001	• The aim of the study was to provide detailed research and evaluation of 26 centres in Ynys Môn and Gwynedd taking into account Government guidance and future retail, leisure and service trends (8 sites in Ynys Môn and 17 sites in Gwynedd)
Application for a supermarket at Peris Road, Caernarfon	2008	• Caernarfon is dominated by comparison goods uses. • Food shops outside Caernarfon attract high numbers of shoppers and therefore there is a demand for a food shop in Caernarfon in order to satisfy this need. • The existing food retail shops operate well and it is considered that they would continue to operate well even with the development of the proposed supermarket. • The development would lead to improving the provision that already exists in the town. • It would reduce the number of necessary journeys for residents. • The development would not have a negative effect on the retail in other parts of Gwynedd
Application for a supermarket at Bangor City Football Club,	2004	• The vast majority of the spending at the proposed supermarket would come from the nearby area. • Between 1998 and 2004, the number of convenience units in the centre of Bangor only

Bangor		increased by two units. This meant that 1% of the units in the centre of Bangor were convenience units, which is lower than the national average. • The number of units selling comparison goods fell between 1998 and 2004 to 11% which still remains a relatively high figure. • An increase in service units from 55 to 63 between 1998 and 2004. • The number of vacant units in Bangor stood at 9% during 2004, a reduction since 1998. • Bangor's role is key as a shopping destination for the local area. • There is a qualitative and quantitative need for a convenience goods development. • The development would not have a negative effect on the town centre of Bangor or on other local centres.
Application for a supermarket at a former bus depot, Beach Road, Bangor	2006	• The development is likely to improve the visual appearance of the nearby area. • The vast majority of the provisions of convenience goods are located outside the town centre, meaning that there is a need for convenience goods provision within the town. • A need for shopping improvements in the city's northern part. • The proposed development would not have a detrimental impact on other nearby retail uses.

6.8 The main findings deriving from the Retail Impact Assessments referred to above reiterate what was noted in the Chesterton survey. It is noted in the Chesterton survey that one of the main retail needs of the residents of Gwynedd is the need for convenience goods shops selling food and drink. Very often, food supermarkets require large floor areas and therefore it is not always possible for them to be located within town centres. Additionally, they need to have convenient access. This means that there is demand for more land in order to provide a car park. However, the siting of supermarkets on the outskirts of towns can be detrimental to town centres which suffer from more people shopping for their convenience goods and comparison goods at the supermarkets rather than visiting the town centres.

6.9 In order to reduce the negative impact that larger supermarkets can have on other nearby local retailers, planning conditions can be added to relevant planning consents. These conditions could mean that the amount of comparison goods sold can be restricted within the supermarkets e.g. the floor space for selling comparison goods at Asda, Pwllheli has been restricted to 10% of the total floor space area and the sale of comparison goods at Lidl, Porthmadog has been restricted to 33% of the floor space.

7.0 Retailing in Anglesey

7.1 Anglesey has a population of 69,751(Census 2011) forming 30,594 households, resulting in an average household size of 2.28. 4,380 of Anglesey's population worked in the Wholesale and Retail Trade including Repair of Motor Vehicles and Motor Cycles sector, namely 14.4% of the total number of jobs 30,431 in Anglesey in 2011 (ONS): Out of 32,600 economically active, 31,100 are in employment and 2,200 are unemployed (Nomis Employment and unemployment July 2011-June 2012).

7.2 Holyhead is the main settlement on the Island with a population of around 13,000. The town is a ferry port with services to Dublin. As the Island's largest settlement, Holyhead also provides the main retail centre. The Penrhos Retail Park situated between the A55 and London Road supplements the retail offer of the town centre.

7.3 The current retail hierarchy in Anglesey is categorised in Chapter 11 of the Ynys Môn Stopped UDP (2005) into four tiers as follows:-

Hierarchy	Anglesey Settlements	Description
Town Centre	Holyhead	Provide a range of facilities, which appeal to a wider catchment than the immediate local community.
District Centres	Llangefni and Beaumaris	Exhibit a wide range of retail and service provision similar to those found in 'town centres' although not as varied.
Local Centres	Menai Bridge, Valley, Benllech, Amlwch, Gaerwen, Rhosneigr, Cemaes and Llanfairpwll	Primary serving the day to day needs but also provide a limited range of other services.
Local Villages	All other villages on the Island	Serving the day to day needs of rural communities.

7.4 The above hierarchy was based on the findings of the Gwynedd & Ynys Môn Retail Study Final Report January 2001 undertaken by Chesterton.

7.5 The following Table shows the major unimplemented planning permissions for retail development on Ynys Môn (2013).

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Application Number	Location	Proposals	Retail Restrictions
34C614/ECON	Burgess Ltd., Bridge Street, Llangefni	Outline application for the demolition of the existing building and erection of a mixed use building comprising A1,A2 and 45 residential apartments	• Permitted subject to signing Section 106 Agreement regarding provision of affordable housing units

7.6 The following retail reports either relate to planning applications for retail developments on the Island or have been commissioned by the Isle of Anglesey County Council

Name of Report	Date published	Summary of main points arising from report
Gwynedd & Ynys Môn Retail Centres Study Final Report – prepared by Chesterton	January 2001	The aim of the study was to provide detailed research and evaluation of 26 centres in Ynys Môn and Gwynedd taking into account Government guidance and future retail, leisure and service trends (8 sites in Ynys Môn and 17 sites in Gwynedd)
Strategic Retail Review – Isle of Anglesey Prepared by Cheetham & Mortimer and White Young and Green for Isle of Anglesey County Council	2004	The consultants were commissioned to assess the potential of the island to attract retail development in the context of the Unitary Development Plan The two objectives of the report were to focus on the • commercial aspects • Planning, regeneration and economic implications
Retail Assessment – Phases 2 & 3 Development at Holyhead Retail Park, Penrhos, Holyhead Prepared by RPS Consultants on behalf of Pettifer Estates Ltd 19C689k/ECON	2006	Reports prepared to support planning application for Phases 2 & 3 Penrhos, Retail Park, (12096sq m gross retail development). The report concluded that there was a quantitative need for additional retail floorspace with evidence of existing store overtrading and significant levels of expenditure leakage out of the study area and off the island. The Study concluded that the development will also provide a qualitative improvement in Holyhead's retail offer.
Ty Mawr Mixed Use	2007 and	Reports prepared to support planning

Development, Llanfairpwll – Retail and Leisure Assessment Prepared by RPS Planning & Development for Ynys Môn Estates 31C169C/TR/EIA/ECON	2008	application for mixed use development at Ty Mawr, Anglesey. RPS concluded that there is a clear and justified need for Anglesey to retain retail and leisure expenditure generated by the island's population and to attract and hold tourists for the benefits of the wider island economy. RPS consider that irrespective of the quantitative need position, the qualitative arguments for Anglesey to improve its retail and leisure offer are unquestionable and can only be addressed by the current application proposals.
Audit of Retail and Leisure Assessments for mixed use development, Ty Mawr, Llanfairpwll, Ynys Môn Prepared by Nathaniel Lichfield and Partners for the Isle of Anglesey County Council 31C169C/TR/EIA/ECON	April 2008	NPL commissioned by IOACC to undertake an independent review of the above Assessment. NPL considered that RPS's comparison capacity is flawed because it fails to take account of the Holyhead Retail Park commitment and assumes that all the retail capacity for new development generated on the Island should be concentrated at the application site. This report questions RPS's convenience capacity study and considers that that there does not appear to be a convincing qualitative need for the proposal. It also considers that RPS has failed to adequately apply the sequential test and raises a number of concerns regarding the retail and leisure impact.
Anglesey Retail and Leisure Study 2010 Lichfield and Partners for the Isle of Anglesey County Council	March 2010	The purpose of the study was to • Analyse the role, health and network of existing centres • Assessment of future needs for additional retail and leisure facilities on Anglesey up to 2021 The report confirmed that Holyhead is the principal retail centre on Anglesey with the largest number of town centre units followed by Llangefni. Beaumaris is identified in the UDP alongside Llangefni as a district centre, although in terms of units it is a similar size to Menai Bridge and Amlwch which are allocated as local centres along with slightly smaller centres. Although there are high vacancy rates in Holyhead and Llangefni, both centres considered to be healthy and perform an

		important retail and service role. The Town Centre checks indicate that the remaining centres are all relatively healthy. An assessment of available expenditure and existing shopping patterns suggested that convenience goods sales floorspace within Anglesey was collectively trading about 12% below expected levels, £12.61 million below average turnover levels. There are a reasonable spread of large foodstores and discount food retailers on the Island and on the mainland to support the retail needs of most of the Island's residents. The quantitative capacity analysis indicate that there is no need for further convenience floorspace provision to be allocated in the Local Development Plan up to 2021. Anglesey's market share of total comparison goods (Non-food durable goods) expenditure retained on the Island is 22%. The current level of comparison expenditure attracted to shops on Anglesey is £44.96 million including tourist expenditure). Average sales densities indicate comparison retail floorspace is trading at the lower end of what we might expect, although Holyhead and Llangefni are trading at reasonable average turnover density levels. The quantitative capacity analysis indicates that existing commitments will absorb all growth in expenditure up until 2016. Assuming Anglesey will maintain its market share of comparison expenditure in the future and vacancy rates will reduce, surplus expenditure resulting from continued population and expenditure growth could support around 450 sq m (net) of additional comparison goods floorspace 2016-2021. Anglesey has a limited range of commercial leisure, entertainment and cultural facilities, whilst Bangor offers a greater choice in terms of private health and fitness clubs. The closest modern bowling facilities, multiplex cinema and

		Bingo Hall are at Llandudno. Potential for further cinema, ten-pin bowling and a bingo hall on the Island is limited. Whilst there is a theoretical scope for 1-2 cinema screens and 6-7 ten pin bowling lanes, there is unlikely to be operator demand for facilities of this size. There is a current shortfall of health and fitness provision on the island. In terms of bars and restaurants (A3 uses), Holyhead is underprovided. However, there is a need to ensure a balance is maintained between the proportion of A3 and A1 premises in other centres. Note: This report does not appear to make any reference to the possible construction of a new nuclear power station at Wylfa and the likely impact of a development of this scale on the quantitative and qualitative retail and leisure needs on the Island.

8.0 SUMMARY OF THE GWYNEDD AND ANGLESEY RETAIL STUDY UNDERTAKEN BY APPLIED PLANNING IN 2012

8.1 Gwynedd and Anglesey Council appointed Applied Planning Consultants to undertake a retail study to provide background evidence base for the Joint Local Development Plan. The Study assessed the need for additional retail floorspace in 25 centres over the Plan Period up to 2026. Volume 1 of the Study sets out the Policy background, detailed study methodology, and assessment of the six main centres in the study area: Bangor, Caernarfon, Holyhead, Llangefni, Pwllheli and Porthmadog. Volume 2 contains an analysis of the remaining Local Centres. Volume 3 provides the Study's Conclusions and Recommendations and Volume 4 contains the Technical Appendices containing the data that underpin the Study. The Consultants have prepared a five page Executive Summary of the Study.

8.2 The retail study has been undertaken to assess the amount and type of retail floorspace required to meet the shopping needs of the area. Too little space and the community will be deprived of the best range and quality of shops that can be provided by the market. If too much retail space is provided there is a risk that there will not be enough trade to support these shops leading to a reduced quality and high levels of vacancies leading to unattractive, poorly maintained centres.

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8.3 The study notes that retail needs change over time. Whilst the effect of economic cycles are usually relatively short term, other factors can be structural and permanent as the retail space needed is dictated by market forces and changing fashions.

8.4 The growth of large supermarkets and out of centre retail developments can affect existing retail centres and how people choose to shop. Another major change has been the growth in internet shopping which is likely to have a significant affect on existing centres.

8.5 The Executive Summary stresses that the retail policies in the new plan must accord with Welsh Government guidance contained in Planning Policy Wales.

The Study Methodology

8.6 The Study methodology .is based on the three stages set out below and accords with well-established best practice techniques.

Stage 1: Assessment of Demand • Definition of Study Area • Subdivision of Study Area into Zones • Current and forecast populations for each zone through a Pitney Bowers Business Insight (PBBI) AnySite Report • Forecast future growth in retail spending per head by goods type from the AnySite Report • Adjust Spending capacity to take account of Special Forms of Retailing (internet and Catalogue Sales • Apportion zones' spending to centres and stores by a Household Survey • Adjust available expenditure to take account of tourism spending to each centre
Stage 2: Assessment of Supply • Survey each centre and calculate net trading floorspace or each retail category • Estimate current retail capacity of each centre by calculating the trading density (turnover per sq.m net floorspace) for comparison and convenience goods by reference to expenditure flows identified in Stage 1 relative to benchmark' trading densities (the turnover that stores may be expected to achieve). • Adjust the trading densities to take account of improvements in 'retail efficiency' (the ability of retailers to achieve greater turnovers from the same floor space) • Assess the effect of additional retail floorspace that could result from existing commitments and planned developments
Stage 3: Assessment of Need • Calculate the quantitative need for additional retail floorspace for both comparison and convenience goods by comparing forecast demand over the plan period against the supply of floorspace • Consider if there is a need to make an allowance for any qualitative deficiencies • Assess the amount of current vacant floorspace and where this is excessive to maintain an adequate level of vitality and viability, adjust the need for additional floorspace accordingly

Study Findings and Recommendations

8.7 Main Recommendations

- No new out of centre retail developments should be permitted
- New retail development should be located within existing retail areas
- In general existing A1 uses should be maintained except in those specified centres where a reduction of floorspace is deemed desirable
- In the identified Local Centres and Towns, where a Retail Core Area has been identified, changes of use from retail should be resisted unless it can clearly be demonstrated that any future retail use would not be viable.

8.8 The main conclusions of the study for each Settlement are as follows:-

Settlements	Conclusions	Recommendations
Bangor	• Study Area's only sub-regional centre and as such provides the greatest amount, choice and quality of retail provision in the area • Attracts expenditure from throughout the Study Area • Noted that Llandudno and Aberystwyth attract some trade from the eastern and southern fringes of the Study Area • Town centre is healthy from a retailing perspective although vacancies are high compared to 2005 largely due to the recession and the opening of the Menai Centre • Out of Centre stores account for over 36% of total comparison sales which is also high.	-Taking into account the need to reduce vacant floorspace - No need for additional retail floorspace for comparison goods before 2016 - Need for additional 5,105 sq.m of net trading floorspace by 2021 and - additional 7913 sq. m by 2026. - No need for additional convenience floorspace over the Plan Period Due to completion of the Asda Supermarket.
Holyhead	• Identified as the most problematic of all the Study's retail centres • Significant oversupply of floorspace over and above what the market can support due largely to the amount and type of retail floorspace developed at Penrhos. This imbalance is forecast to remain over the Plan period , is revealed through high levels of vacant shops and in	- Reduction in retail floorspace and concentration in Stanley Street (south), Market Square and Market Street. - Existing retail uses in this area should be protected by resisting applications for change of use. - In other areas changes of use to more viable

	general poor quality retailing • Poor vitality and viability • New retailers who could attract shoppers into the town are reluctant to locate in the centre due to perceived lack of business. This spiral of decline difficult to reverse	uses should be encouraged. Uses could include A2 (Financial and Professional Services), and A3 (Hot Food) - Opportunities where conversion or redevelopment to residential use could be encouraged should be identified. - Initiatives to find a niche role for the town e.g. farmers markets should be explored. - Reduce stock of retail premises to a level which can be supported by the available expenditure should result in a reduction in the number of vacancies , improve viability of existing businesses and by focusing shops in a more concentrated area, the vitality of the centre will be improved
Caernarfon	• Serves extensive catchment area to the south but its retail role is limited due to the proximity of Bangor • Considered that the town is slightly underperforming • One part of the centre based around Liverpool Street and Bridge Street which primarily serves the needs of residents • The other part around High Street, Palace Street, Hole in the Wall Street , Castle Street and Paternoster buildings centred around the walled 'Old Town' and the Castle and are particularly well suited to serve the sizeable tourist market • These two areas should be regarded as separate but complimentary.	- No existing need for additional comparison goods floorspace until towards the end of the Plan Period (2026) when there will be a need for 176 sq. m net. -Existing modest need for an additional 74 sq m net of convenience floorspace increasing to 200 sq.m net by 2026.
Pwllheli	• Serves much of the Llŷn Peninsula • And is a tourist centre • Considered healthy in retail	-Core Retail Area identified that should be protected from change of use

	terms with a low level of vacancies	-No identified need for new comparison goods until 2021 when there will be a need for an additional 413 sq.m net -Existing need for 105sq. m net of convenience floorspace which increases to 172 sq.m net by 2026.
Porthmadog	• Healthy retail centre • Very low vacancy rates • Good range of quality comparison shops many catering for the tourist market together with a Tesco, Aldi and Lidl supermarkets • two extant planning permissions for new retail floorspace on the Penamser Industrial Estate	-Although there is a low level of vacant property consider there is no need for additional retail floorspace over the Plan Period.
Llangefni	• Smallest of the main centres, serving central Anglesey • Providing a basic range of services • Low level of vacant property • Good level of vitality	- Whilst the town is well catered for in the sale of convenience goods largely as a result of the ASDA supermarket, the Study has identified a need to improve comparison shopping with a need of 44 sq.m net of floorspace growing to 492 sq.m net by the end of the Plan Period.
Abermaw (Barmouth) and Towyn	• Largest of the Local Centres • Both relatively remote from the main centres considered in Volume 1 of the Study with sizeable catchment areas. • Both towns have well defined linear shopping centres along either side of a main road. • Both have a good range of shops although Barmouth would benefit from improved convenience store provision	
Beaumaris, Criccieth and Menai Bridge	• Smaller ‘prosperous Local Centres’ serving their immediate catchment areas but also have some quality shops that will attract shoppers from further afield • Bangor provides much of the retailing needs for Beaumaris	

	and Menai Bridge, and Criccieth is accessible to both Porthmadog and Pwllheli	
Amlwch, Benllech, Llanfairpwll, Penygroes and Valley	• These centres provide basic retail facilities for their local communities. • In Llanfairpwll there is the stand- alone Pringle Centre which is essentially a factory outlet which attracts shoppers and tourists from a wide catchment area. • With the exception of Amlwch, none of these centres have strong well defined retail centres and this detracts from their attractiveness	- Penygroes would benefit from a stronger comparison goods offer.
Cemaes, Gaerwen and Penrhyndeudraeth	• These are 'Small Local Centres' which provide only for basic needs of their local communities. All are dependent on larger centres for a significant part of their retailing needs and this is particularly true of Gaerwen which contains two small convenience stores.	
Abersoch, Llanberis and Rhosneigr	• Heavily dependent on tourist related trade • Facilities for the resident population, particularly in the Abersoch and Rhosneigr are very limited.	
Bethesda Blaenau Ffestiniog and Nefyn.	• Described in the Study as ' Failing Centres' and all have a surplus of retail space over and above that which can be viably supported by the local communities and any tourist trade.	- Recommend a reduction in overall floorspace in Bethesda and Blaenau Ffestiniog would be beneficial in creating refocused concentrated centres which would be more viable and capable of generating the desired levels of vitality.

9.0 OVERALL CONCLUSIONS

9.1 Here is an overview of the key findings and issues deriving from the literature review together with the research undertaken by Applied Planning

- In the retail sector, the expenditure of consumers has reduced on a national basis and retailers are facing challenging retailing circumstances.

- Several vacant units in the areas which are considered to be the heart of the shopping centre. During the previous year some of the larger high street's most famous national chain stores have closed down due to the economic recession. As a result the number of vacant units within the town centres has increased.

- Online shopping and home shopping is likely to increase in popularity over the Plan Period. The role out of improved broadband provision may result in an increase in online shopping to the detriment of the retail offer in existing centres.

- Gwynedd Council and Anglesey Council have measures underway which aim to overcome the impact of the economic recession on retailers and through the Anglesey's Three Town's Programme and Gwynedd's Action Plan – 'Gwynedd Working: Responding to the Recession' (May, 2009). However most of the smaller retail centres are not the subject on any specific initiatives or plans.

- The JLDP will need to consider proposals outlined in Masterplan and Regeneration Plans prepared for the main towns.

- Consider whether a series of new and revised Masterplans need to be drafted for other town centres within the Plan Area.

- The Retail Study for the Joint LDP area (2012) forecasts there will be a need for additional shopping floor space within some settlements during the lifetime of the Joint LDP.

- Town centres have a broader role to play which is extremely important for:
    - Economic Development
    - Ensuring that a variety of uses are available,

- Creating opportunity areas,
- Reducing the need to travel,
- Being a catalyst for successful regeneration,
- Helping to create and maintain inclusive communities.

- Some of the defined ‘town centres’ boundaries, identified in existing development plans will need to be changed to reflect recent trends and evidence from the analysis of up to date retail surveys.

- Bangor has an important role as a shopping centre that is acknowledged locally and nationally.

- A number of shopping centres outside the LDP area are likely to continue to meet the needs of some of the residents of the LDP area e.g. Wrexham, Machynlleth Llandudno and Chester especially for ‘comparison’ goods, such as clothes.

- Problems associated with retailing in remote rural areas include:-
  - geographical remoteness
  - Poor infrastructure
  - Low population densities
  - Limited employment opportunities and
  - poor development capacities

- The need for sustainable development will include the provision of retailing in smaller settlements. Appropriate consideration will need to be given to seeking to prevent the loss of village shops in smaller settlements.

- The vitality, viability and attractiveness of the Study Area’s retail centres will be important factors in sustaining the Area’s economy and communities.

- Need to allow some flexibility in the types of uses that are likely to be acceptable in defined retail centres to ensure that identified centres remain the primary focus for retail and other town centre type uses.

- Need for strong policy to support adopting sequential approach in relation to town centre uses with preference for town centre locations, followed by edge of centre sites and only then out of centre sites in locations that are accessible by a choice of means of transport.

- Need policies to encourage beneficial use of upper floors above existing shops and town centre type uses.

- Consider whether specific policies are required to control the location of hot food take aways in existing centres

- The results of the Retail Study will be used to draw up the strategy and policy in terms of the retail provision.

- There is a need to ensure that retail policies meet the requirements of Planning Policy Wales (Edition 5 2012) in terms of the hierarchy of centres.

APPENDICES

APPENDIX 1. USE CLASSES ORDER

Changes of Use

Sustaining the vitality of town centres depends on the flexibility in the use of floor space. The Town and Country Use Classes Order 1987. Part A comprises three classes covering uses that will generally be found in shopping areas in shopping areas. Changes of use within a class and between essentially similar activities do not require planning permission. Spaces above shops can be converted into a flat without planning permission.

Summary of Retail Provisions

Some changes of use are permitted without the need to apply for planning permission from both A3 and A2 Uses (with display window at ground floor level) to A1 (Classes A and D of part 3 of the Town and Country Planning (Use Classes) Order 1987 (as amended) Town and Country Planning (General Permitted Development)Order 1995 (as amended); conversion from A3 to A2 us (Class C of Part 3 of the Order) changes between single and mixed uses within A1 and A2 uses (with display window at ground floor level) and as single flat (Class F and G of the Order)..

Class A1 (Shops)

- Most types of shops as well as post offices, travel agents, hairdressers, funeral director's premises, hire shops and dry cleaners.

Class A2 (Financial and Professional Services)

- Banks, building societies and other financial and professional services (other than health or medical services) betting offices and other service provided principally to visiting members of the public.

Class A3 (Food and Drink)

- Hot food shops, restaurants, cafes, snack bars, wine bars and public houses.

APPENDIX 2. GLOSSARY OF TERMS

Comparison goods	Relatively high value goods, such as shoes, electrical equipment furniture ,clothes where the customer makes a comparison between different shops
Convenience goods	Widely distributed and relatively inexpensive goods which are purchased frequently and with minimum of effort, such as petrol, newspapers, and most grocery items
Regeneration	an integrated set of activities that seek to reverse economic, social, environmental and physical decline to achieve lasting improvement, in areas where market forces will not do this alone without some support from government
Vitality	Vitality is a reflection in how busy a centre is at different times and in different parts, and attractiveness in the facilities and character which draws in trade
Viability	Viability refers to the ability of the centre to attract investment, not only to maintain the fabric but also to allow for improvement and adaptation to change needs

APPENDIX 3. RELEVANT DOCUMENTS AND REFERENCES

Action for Market Towns (2012)	Market Town Benchmarking Llangefni, Report
Anglesey, Gwynedd and Conwy Councils`(2009)	'Closing the gap North West Wales Spatial Development Strategy
Applied Planning Consultants (2012)	Gwynedd and Anglesey Retail Study
British Retail Consortium November 2012	21st Century High Streets: What next for Britain's town centres
Department for Business, Innovation and Skills (2011)	Understanding High Street Performance – A report prepared by GENECON LLP and Partners.
Gwynedd Council (1993)	Gwynedd Structure Plan
Gwynedd Council (2011)	Three Year Plan 2011-2014
Gwynedd Council (2009)	Gwynedd Unitary Development Plan 2001-2016
Isle of Anglesey County Council (1996)	Ynys Môn Local Plan
Isle of Anglesey County Council (2005)	Ynys Môn Stopped Unitary Development Plan
Local Data Company	
National Assembly of Wales Enterprise and Business Committee (2012)	Regeneration of town centres.
Portas M (2011)	The Portas Review – An independent review into the future of our high streets.
Wales Rural Observatory' (2007)	Small Market Towns in Wales
Welsh Government (1996)	TAN 4 Retailing and Town Centres
Welsh Government (2008)	The Wales Spatial Plan
Welsh Government (March 2013)	Vibrant and Viable Places New Regeneration Framework
Welsh Government November 2012	Planning Policy Wales Edition 5