

Cyngor Sir Ynys Môn	
Adroddiad i:	Pwyllgor Polisi Cynllunio
Dyddiad:	15 Ionawr 2026
Pwnc:	Canlyniadau Astudiaeth Manwerthu ac Argymhellion ar gyfer Cynllun Datblygu Lleol Newydd
Aelod(au) Portffolio:	Y Cynghorydd Nicola Roberts (Cynllunio, Gwarchod y Cyhoedd a Newid Hinsawdd)
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Aelodau Lleol:	Mae'n berthnasol i bob Aelod Lleol

1.0 Pwrpas yr Adroddiad

1.1 Diben yr adroddiad hwn yw diweddaru Aelodau am ganlyniad yr Astudiaeth Manwerthu a gomisiynwyd, a baratowyd gan Lambert Smith Hampton ar gyfer Cyngor Sir Ynys Môn. Mae'r Astudiaeth yn cynnig sylfaen dystiolaeth er mwyn paratoi polisiau am fanwerthu a chanol trefi, gan ddisodli Astudiaeth Manwerthu Gwynedd a Môn 2012.

2.0 Penderfyniad sydd ei angen

2.1 I dderbyn canfyddiadau Astudiaeth Manwerthu 2025 fel y sylfaen ar gyfer datblygu polisiau yn y Cynllun Datblygu Lleol ar y Cyd.

3.0 Trosolwg o'r Canfyddiadau

3.1 Mae'r adroddiad yn cynnig asesiad mwy diweddar ar yr angen manwerthu yn Ynys Môn, a'i fwriad yw dylanwadu ar y Cynllun Datblygu Lleol 2024 - 2039 draft. Mae'r astudiaeth yn canolbwyntio ar y 10 pryder sy'n ymwneud â manwerthu:

- Canolfannau manwerthu trefol: Caergybi, Llangefni
- Canolfannau manwerthu lleol: Amlwch, Benllech, Biwmares, Cemaes, Llanfairpwll, Porthaethwy, Rhosneigr, Y Fali.

3.2 Mae'r astudiaeth yn amlinellu tueddiadau economaidd ac yn y farchnad genedlaethol, a sut mae'r rhain yn cael dylanwad ar ganolfannau Ynys Môn.

Mae'n nodi bod tueddiadau cenedlaethol yn effeithio'n fwy ar ganolfannau mwy yn hytrach na chanolfannau lleol.

3.3 Mae'r astudiaeth hefyd yn asesu ymddygiadau siopa cyfredol ac yn rhagweld sut all hyn newid yn y dyfodol (yr angen mesurol am ddatblygiad manwerthu newydd). Mae'r dadansoddiad mesurol yn seiliedig ar ddata gwariant gan Experian Insights. Mae'r casgliadau'n nodi nad oes angen mesurol am leoliadau manwerthu cymharol neu gyfleuster yn y Cynllun (2024-2039). Rhagwelir y bydd llond llaw o leoliadau "dros ben" yn bodoli a nad yw ynddo'i hun yn haeddu newidiadau l'r ffiniau. Fodd bynnag, mae'r astudiaeth yn argymhellion diweddariadau ffiniau bach yn Caergybi, Llangefni, Amlwch, Biwmares, Cemaes, Y Fali, Benllech, fel bod ardal ddiffinedig pob canolfan yn cyd-fynd yn well a'r mannau lle mae mae siopau a gwasanaethau wedi eu canolbwyntio bellach.

3.4. Mae'r astudiaeth hefyd yn cynnwys gwiriad iechyd canol tref ar gyfer bob un o'r 10 canolfan (a Gaerwen). Mae'r gwiriad yn ystyried iechyd, rôl a swyddogaeth canolfannau unigol er mwyn datblygu polisiau i gefnogi eu hyfywedd a'u bywioldeb hirdymor. Mae'r gwiriadau iechyd yn ystyried amrywiaeth defnydd, gwagleoedd a nifer yr ymwelwyr.

3.5 Mae crynodeb o opsiynau posibl ac argymhellion polisi wedi'u cynnwys ar gyfer pob setliad. Mewn rhai achosion, mae hyn yn cynnwys argymhellion i newid ffiniau canol tref ac ardaloedd siopa cynradd sydd wedi'u diffinio.

5.0 Hierarchaeth Manwerthu (Arfaethedig):

5.1 Mae'r astudiaeth yn argymhellion newid o 2 haen i'r hierarchaeth manwerthu presennol (fel y Cynllun Datblygu Lleol ar y Cyd). I dair haen fel yr amlinellir isod:

Haen	Canolfannau
Canolfannau Trefol	Caergybi Llangefni
Canolfannau Lleol	Amlwch Biwmares Benllech Llanfairpwll Porthaethwy Y Fali
Canolfannau Lleol Bach	Cemaes Gaerwen Rhosneigr

6.0 Argymhellion Polisi

6.1 Mae'r astudiaeth yn argymhellion sawl diwygiad arfaethedig i eiriad y polisiau cyfredol yn y Cynllun Datblygu Lleol. Bydd yr ystyriaethau hyn yn cael eu hystyried fel rhan o'r gwaith o ddrafftio'r ddogfen Strategaeth a Ffafrir.

7.0 Casgliadau strategol:

7.1 Nid oes angen unrhyw ddyraniadau manwerthu newydd. Yn hytrach, dylai'r polisi manwerthu ganolbwytio ar amrywio, aildefnyddio a hyfywedd. Mae agen adolygu ffiniau i adlewyrchu gwirionedd patrymau masnachu sydd wedi newid. Dylid annog defnydd cymysg a datblygiadau hamdden er mwyn gwella gwydnwch. Caergybi sy'n cael y flaeoniaeth o ran adfywio, ac mae Llangefni yn sefydlog ac yn perfformio'n dda. Mae canolfannau llai yn hynod bwysig yn lleol ac i ymwelwyr, a dylid eu gwarchod a'u gwella yn unol â hynny.

8.0 Argymhelliaid

8.1 Bod Aelodau'n derbyn yr adroddiad, a'i gasgliadau fel sylfaen ar gyfer drafftio polisi yn y Strategaeth a Ffafrir.

Isle of Anglesey County Council	
Report to:	Planning Policy Committee
Date:	15 January 2026
Subject:	Retail Study results and recommendations for new LDP
Portfolio Holder(s):	Cllr. Nicola Roberts (Planning, Public Protection and Climate Change)
Head of Service / Director:	Christian Branch Head of Regulation & Economic Development Service
Report Author:	Laura Parry (Assistant Policy Officer)
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Local Members:	Applicable to all Elected Members

1.0 Purpose of Report

1.1 The purpose of this report is to provide Members with an update on the outcome of the commissioned Retail Study produced by Lambert Smith Hampton for the Isle of Anglesey County Council. The Study provides an evidence base to inform retail and town centre policies, replacing the 2012 Gwynedd & Anglesey Retail Study.

2.0 Decision required

2.1 To accept the findings of the 2025 Retail Study as the basis for policy development in the LDP.

3.0 Overview of findings

3.1 The report provides an updated assessment of retail need in Anglesey and is intended to inform the emerging draft Local Development Plan 2024 to 2039 (LDP). The study focuses on the 10 retail centres:

- Urban retail centres: Holyhead, Llangefni
- Local Retail centres: Amlwch, Benllech, Beaumaris, Cemaes, Llanfairpwll, Menai Bridge, Rhosneigr, Valley.

3.2 The study outlines national economic and market trends and how these have affected Anglesey centres. It notes that the larger centres are more affected by national trends than local centres.

3.3 The study also assesses current shopping behaviour and forecasts how this may change in the future (i.e. the quantitative needs for new retail development). The quantitative analysis is based on expenditure data from Experian Insights. The conclusions are that there is no quantitative need for additional convenience or comparison retail floorspace in the Plan period (2024-2039). There is a relatively small forecast “surplus” floorspace which itself does not merit boundary changes. The study does however recommend small boundary updates in Holyhead, Llangefni, Amlwch, Beaumaris, Cemaes, Valley, Benllech and Rhosneigr, and the creation of a new boundary for Gaerwen, so that each centre’s defined area better matches where shops and services are now concentrated.

3.4 The study also contains a town centre health check for each of the 10 centres (and Gaerwen). The check considers the current health, role and function of individual centres in order to develop policies to support their long term vitality and viability. The health checks consider diversity of uses, vacancies and footfall.

3.5 For each settlement a summary of future prospects and policy recommendations is included. In some cases this includes recommendations to change the extent of the town centre boundaries and defined primary shopping areas.

4.0 Retail Hierarchy (Proposed):

4.1 the study recommends a change to the existing retail hierarchy from 2 tiers (as in the current JLDP). To three tiers as outlined below:

Tier	Centres
Urban Centres	Holyhead Llangefni
Local Centres	Amlwch Beaumaris Benllech Llanfairpwll Menai Bridge Valley
Small Local Centres	Cemaes Gaerwen Rhosneigr

5.0 Policy Recommendations:

5.1 The study recommends a number of proposed revisions to the wording of current policies in the JLDP. These recommendations will be considered as part of drafting the Preferred Strategy document.

6.0 Strategic conclusions:

6.1 No new retail allocations are required. The focus for retail policy should shift to diversification, reuse and vitality. Boundary revisions are necessary to reflect the reality of altered trading patterns. Mixed use and leisure development should be encouraged to enhance resilience. Holyhead remains the regeneration priority and Llangefni is stable and well-performing. Smaller centres continue to play a critical local and visitor role should be protected and enhanced accordingly.

7.0 Recommendation:

7.1 That Members accept the report and its conclusions as the basis for policy drafting in the Preferred Strategy.

Isle of Anglesey Retail Study

Main Report

Prepared for:

Isle of Anglesey County Council

December 2025

lsh.co.uk

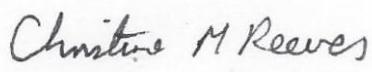


This document has been prepared and checked in accordance with the Lambert Smith Hampton Quality Assurance procedures and authorised for release. If not signed off by a Director in the Planning, Regeneration + Infrastructure (PR+I) division at LSH then this document should be treated as a draft, and as being Private and Confidential. It should not be for wider distribution without the sign-off and permission of Lambert Smith Hampton.

This report meets the PDF/UA (Universal Accessibility) standard, which is equivalent to the WCAG 'AA' digital standard.

Prepared by:

Christine Reeves

Signed: 

For and on behalf of Lambert Smith Hampton

Issued: December 2025

Contents

1. INTRODUCTION	4
2. PLANNING POLICY CONTEXT	5
3. ECONOMIC AND MARKET TRENDS	12
4. TRADING PATTERNS AND RETAIL CAPACITY	14
5. HEALTH CHECK AND TOWN CENTRE STRATEGY CONSIDERATIONS	16
6. RETAIL AND TOWN CENTRE POLICY RECOMMENDATIONS.....	32

Appendices

APPENDIX A: ECONOMIC AND MARKET TRENDS

APPENDIX B: RETAIL AND LEISURE CAPACITY ASSESSMENTS

APPENDIX C: HEALTH CHECK ASSESSMENTS

1. INTRODUCTION

1. This report has been prepared by Lambert Smith Hampton ('LSH') on the instruction of Isle of Anglesey County Council ('the Council' / 'IoA CC'). It provides an updated assessment of retail need in Anglesey and is intended to inform the emerging draft Local Development Plan 2024 to 2039 (LDP).

Background

2. The current Local Development Plan for Anglesey is the Anglesey and Gwynedd Joint Local Development Plan (JLDP) which was adopted on 31 July 2017.
3. The two County Councils ended their joint working agreement on planning policy matters on 31 March 2023 and therefore the new LDP for Anglesey will be prepared by IoA CC.
4. The purpose of this document is to provide the robust evidence required to inform the emerging policies relating to retail and commercial uses that will supercede those in the JLDP. It replaces the Anglesey part of the Gwynedd and Anglesey Retail Study (GARS) prepared in 2012 by Applied Planning (AP), which is now out of date.
5. A key purpose of this report is to update the primary evidence base on retail expenditure flows and market shares and to assess how recent and future economic and market changes will affect the town centres in Anglesey. In doing so it seeks to provide a robust evidence base which the Council can use to inform the policies in the emerging LDP.

Report Structure

6. The report is structured as follows:
 - **Section 2** sets out the planning policy context for the study and Anglesey. It looks at what is required by national planning policy in terms of local development plan preparation and summarises the relevant policies in the current JLDP;
 - **Section 3** looks at the economic and market trends that have and will continue to affect retail and commercial leisure uses in Anglesey, with detailed information on trends provided in Appendix A;
 - **Section 4** introduces the existing available information on the study area and trading patterns within it, based on the new expenditure data for Anglesey, with the detailed findings presented in Appendix B. It also summarises the key outputs from our quantitative assessment of retail capacity/need;
 - **Section 5** summarises the key findings from the health checks of the main centres. Full details are provided in Appendix C. It also provides our recommendations regarding the future of the individual centres; and
 - **Section 6** provides a summary of our findings and provides advice to the Council on the policy implications for the LDP.

2. PLANNING POLICY CONTEXT

National Policies

Planning Policy Wales

7. National planning policy is set out in Planning Policy Wales (PPW), the most recent version of which was published in February 2024 (Edition 12).
8. To support the Government's primary objective of ensuring that the planning system contributes towards the delivery of sustainable development and improves the social, economic, environmental and cultural well-being of Wales, PPW identifies a number of overarching objectives for retail and commercial centres, which are recognised as hubs of social and economic activity and the focal point for the diverse range of services which support the needs of local communities. They are highly accessible by different modes of transport and are therefore the most sustainable locations for new development (para 4.3.1).
9. PPW requires the planning system to:
 - Promote viable urban and rural retail and commercial centres, as the most sustainable locations to live, work, shop, socialise and conduct business;
 - Sustain and enhance retail and commercial centres' vibrancy, viability and attractiveness; and
 - Improve access to, and within retail and commercial centres, by all modes of transport, prioritising walking, cycling and public transport (para 4.3.3).
10. These objectives are to be delivered by local planning authorities through their development plans and development management decisions, ensuring their maximum contribution to the well-being goals. National policy requires that:
 - Retail and commercial centres should be identified in development plans (para 4.3.2);
 - Development plans should provide a clear strategy for retail development, supported by policies to achieve vibrant, attractive and viable retail and commercial centres. These should set out a framework for the future of retail and commercial centres in the area, taking account the strategies adopted in adjoining areas (para 4.3.5);
 - The strategies should be based on an understanding of the changing retail pressures and opportunities affecting the centres and devise appropriate responses. This could include planning for the expansion of a centre, its reinvigoration, or managing a change in the relative importance of some centres as others expand (para 4.3.6);
 - Strategies and supporting policies should be based on robust evidence (para 4.3.6) and planning authorities should consult with the private sector and local communities (para 4.3.7);
 - If a need for additional retail development is identified, authorities should consider the most appropriate form, scale and location for new provision to best meet the requirement and improve social, economic, environmental and cultural well-being (para 4.3.8). If sites are not allocated (para 4.3.17), then

criteria based policies should be included in the development plan against which proposals can be assessed (para 4.3.9);

- A hierarchy of retail and commercial centres should be established and boundaries for the centres should be shown on the Proposals Map (para 4.3.10). Centres should be categorised by their functions they perform, and account should be taken of the size, scale, form and location of the centres within an area (paras 4.3.11 & 4.3.12);
- The development plan process should include an assessment of the need for additional retail development. This should include a consideration of quantitative and qualitative need (para 4.3.13). Precedence should be given to establishing quantitative need before qualitative need is considered for both convenience and comparison floorspace (para 4.3.15);
- Qualitative need may be an important consideration in certain circumstances where it supports the objectives of the local development plan or national planning policy. However, it is for the planning authority to determine and justify the weight given to any qualitative assessment (paras 4.3.16 – 4.3.17);
- Policies should encourage a diversity of uses in a centre, recognising that this contributes to vibrancy and viability, but the areas with a concentration of retail uses should be recognised by the designation of primary and secondary shopping areas on the Proposals Map (para 4.3.31 – 4.3.32). The types of uses acceptable in these areas should be defined in policies (para 4.3.33);
- Mixed use developments including leisure and entertainment uses should be encouraged where appropriate (para 4.3.34);
- The health of centres should be monitored and changes made to the policies or boundaries if the right balance of use and activity is not being achieved (paras 4.3.35 – 4.3.36);
- Development plans should also include policies to protect existing retail sites from inappropriate development, unless there is evidence that an existing retail site is no longer required (para 4.3.24); and
- Policies and supplementary planning guidance should support the management of retail and commercial centres (para 4.3.39).

11. PPW is also explicit as to the types of other uses considered to be complementary to retail and therefore appropriate in retail and commercial centres. These include:

- Financial and professional services (A2);
- Food and drink (A3);
- Offices (B1);
- Hotels (C1);
- Residential institutions (C2);
- Educational and other non-residential establishments (D1);
- Leisure (D2); and
- Other uses such as launderettes and theatres (para 4.3.21).

12. The contribution of a vibrant and viable evening and night-time economy is also recognised, although the compatibility of the offer with nearby residential uses should be considered (para 4.3.34). Similarly, creative and cultural business clusters can be important catalysts for regeneration (para 4.3.45 – 4.3.46).

Technical Advice Note 4: Retail and Commercial Development

13. PPW is supported by a series of Technical Advice Notes (TANs) including Technical Advice Note 4: Retail and Commercial Development (TAN4) which provides further guidance on retail and town centre policy, both in relation to policy making and development management.
14. It sets out a requirement for local planning authorities to plan positively to protect and enhance the vibrancy, viability and attractiveness of their retail and commercial centres and to develop their retail evidence base. It also provides additional guidance on:
 - How to define retail and commercial centre hierarchies, including the need to consider the future status of a centre;
 - The types of policies that may be appropriate in relation to changes of use and the degree of flexibility a local planning authority wishes to see;
 - The development of a clear strategy for retail and commercial centres during the plan period;
 - The factors that should be considered in deciding how any identified retail need should be met, or how decline should be managed to ensure that communities retain access to the goods and services they require;
 - The benefits of developing the night-time economy in relevant centres;
 - How quantitative retail need should be assessed, noting that the outcome can be sensitive to small changes in the assumptions. No particular methodology is prescribed, but assessments should be prepared in a clear logical and transparent way using robust and realistic evidence;
 - The appropriate times to consider qualitative need and when retail development may be justified on this basis;
 - The 'town centre first' approach to development and how the sequential test should be applied both in relation to development plan site allocations and planning applications for retail or other town centre uses;
 - The need to consider the impact any new site allocations may have on existing retail and commercial centres;
 - The use of designated Primary and Secondary Shopping Areas to promote and maintain an effective distribution and balance of uses within a centre, noting that the level of flexibility applied is likely to reflect the centre's retail performance and demand for space; and
 - The need to undertake regular assessments or 'health checks' of centres as a means of monitoring change over time, using a range of indicators to measure vitality, attractiveness and viability. A number of specific measures are referenced but TAN4 recognises that locally specific indicators may also be relevant.

Other National Policy Guidance

15. Other documents that may be of relevance include Future Wales – The National Plan 2040 (February 2021) and Building Better Places (July 2020).
16. **Future Wales – the National Plan 2040** is the national development framework and sets out the direction for development in Wales to 2040. It is the highest tier of development plan and is focussed on solutions to issues and challenges at a

national level. Its specific purpose is to ensure that the planning system at all levels is consistent with and supports the delivery of the Welsh Government's strategic aims and policies.

17. As a result, it does not contain statements on all land use planning issues set out in Planning Policy Wales but instead has policies on issues which the Welsh Government considers to be a national priority or are matters which are distinctly spatial and require national leadership.
18. In relation to retail and town centre matters, Future Wales is clear that existing cities and large towns will be the main focus for development and identifies Holyhead as a Regional Growth Area.
19. Future Wales sets out a 'Town Centre First' approach to development (Policy 6) which extends the well-established approach for retail development to a wider range of land uses including significant new commercial, education, health, leisure and public service facilities as well.
20. This recognises the changing nature of town centres, which are moving away from their traditional retail roles. Health and vibrancy however, can be maintained by widening the uses accommodated in centres, which also benefit from good access by public transport to and from the whole town or city and, where appropriate, the wider region.
21. A sequential approach must be used to inform the identification of the best location for these developments, with the aim of making town centres multi-functional places and the focus of growth and regeneration. Intensification and diversification in and around town centres is also supported.
22. **Building Better Places (July 2020)** seeks to consider the relevant place-making responses to the Covid-19 pandemic. It sets out the Welsh Government's planning policy priorities in the recovery period. This includes 'revitalising our town centres' as one of 8 key issues to be addressed.
23. The Welsh Government recognises that the retail sector was already struggling before the pandemic and notes that the planning system must respond to this situation by ensuring that retail and commercial centres can operate as flexibly as possible.
24. The starting point for this is considered to be:
 - A clear vision for each centre in LDPs;
 - An assessment of the role and function of the established shopping areas; and
 - Realistic and sensible boundaries for the centre, with the identification of sites for redevelopment. In particular, Primary Retail Areas need to be reviewed and there should not be an expectation that retail occupiers will return in the numbers witnessed prior to the pandemic.
25. Linked to this, town centre assessments should replace retail assessments for Development Plans and consider the wider array of use requirements, based upon the evidence and vision for the centre in line with the Town Centre First Principle.
26. Building Better Places also notes the importance of:
 - Considering the opportunities to use outside spaces within town centres;

- Making centres places where a variety of retail, employment, commercial, community, leisure, health and public sector uses come together in a hub of activity to make them viable as go-to destinations once more;
- Considering the introduction of flexible, local co-working spaces;
- Introducing/expanding residential uses to improve the vitality of centres, provided that they do not curtail the commercial activities which take place and soundscapes are considered; and
- Challenging unreasonable and inflexible policies as creative thinking will be needed to reimagine and re-purpose these areas.

The Local Development Plan

27. The Local Development Plan (LDP) for the Isle of Anglesey is the Anglesey and Gwynedd Joint Local Development Plan 2011 – 2026 (JLDP), which was adopted in July 2017. The key retail and commercial centre policies are as follows:

- **Strategic Policy PS 15: Town Centres and Retail** which defines the retail hierarchy within the Plan area as:
 - Urban Retail Centre = Holyhead, Llangefni
 - Local Retail Centre = Amlwch, Benllech, Beaumaris, Cemaes, Llanfairpwll, Menai Bridge, Rhosneigr, Valley
- The centres are defined on the Proposals Map and their vitality and viability is supported by:
 - Encouraging a diverse mix of suitable uses;
 - Ensuring investment is consistent with the scale and function of the centre in terms of its position in the retail hierarchy;
 - Identifying the location and quantum for new retail floorspace, including 492 sqm net comparison in Llangefni;
 - Resisting the loss of retail units within Primary Retail Areas, as shown on the Proposals Map;
 - Maximising opportunities to re-use suitable buildings within town centres;
 - Restricting the expansion of out-of-town retailing and leisure development; and
 - Encouraging suitable links between the workplace, home and town centres.
- **Policy Man 1: Proposed Town Centre Developments** which sets out the considerations for new development proposals including the need to comply with the sequential approach and demonstrate the need for any proposals outside of a defined centre.
- Proposals for uses in town centres should enhance a centre's vitality and viability, be in keeping with adjacent uses and not create an excessive amount of dead frontage. Proposals other than for retail uses should also not undermine the retail role of a centre.

- The policy also sets out the criteria for consideration where proposals would lead to the loss of retail and leisure uses within a defined town centre (but outside a Primary Retail Area).
- **Policy Man 2: Primary Retail Areas (Retail Core)** which designates Primary Retail Areas (PRAs) for Holyhead and Llangefni and restricts changes from ground floor retail to those proposals where the premises are no longer viable for A1 use, have been marketed appropriately and the change of use would not have an unacceptable impact on the retail function or other characteristics of the PRA.
- **Policy Man 3: Retailing Outside Defined Town Centres But Within Development Boundaries** which seeks to safeguard existing retail uses elsewhere within the development boundary unless there are alternative services nearby, the property has been marketed for at least 6 months and the new use would not have a detrimental impact.
- Proposals for new small scale convenience shops are supported provided they do not jeopardise the vitality and viability of existing town centres and do not form part of an industrial estate.
- Major retail development and the sub-division of existing units outside of defined centres will only be supported if certain criteria are met relating to retail need, compliance with the sequential test and a consideration of impact.
- **Policy Man 4: Safeguarding Village Shops and Public Houses** which seeks to protect existing uses unless there is a similar service within a reasonable walking distance or it has been demonstrated that the use is no longer financially viable.
- **Policy Man 5: New Retailing in Villages** which sets out the criteria needed to support proposals for new or extended shops, including no negative impact on the vitality of existing Retail Centres.
- **Policy Man 6: Retailing in the Countryside** which sets out the criteria needed to support proposals in the countryside.

28. In addition advice on Hot Food Takeaways is provided in Policy Man 7.

Planning Policy Conclusions

29. National planning policy recognises the importance of town centres in economic, social and sustainability terms and seeks to sustain and enhance their vibrancy, viability and attractiveness as retail and commercial centres.

30. PPW sets out a number of objectives for town centres that are to be delivered by local planning authorities through their development plans and these requirements are reflected in the retail and town centre policies of the current Development Plan for Anglesey.

31. Both the retail sector and the economy have however changed significantly since the JLDP policies were formulated and shopping habits have changed. Town centres need to diversify and broaden their offer, if they are to remain relevant and successful.

32. The rest of this study looks to examine trends and future retail and commercial floorspace requirements in Anglesey and to assess the current health, role and

function of the currently defined centres. It then provides advice on whether current policies require revision, specifically in relation to:

- The retail hierarchy;
- The need to allocate new sites for retail or other commercial development;
- The extent of town centres (as currently defined on the Proposals Map);
- The extent of Primary and Secondary Retail Areas; and
- The policies relating to uses in these areas.

33. It also considers the extent to which individual strategies may be required for the defined town centres.

3. ECONOMIC AND MARKET TRENDS

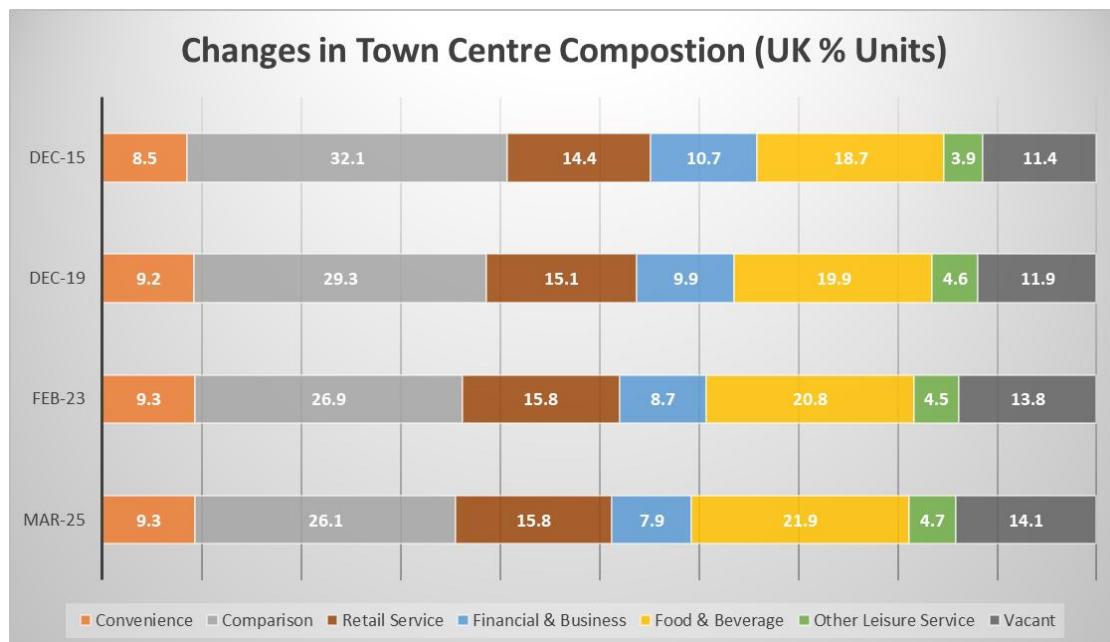
34. Town centres have always been dynamic multi-functional places that have developed in response to the evolving needs of their catchment area. As a result their health and offer will change over time in response to wider external factors including the general economic position, consumer shopping and leisure trends and business practices.

35. The effect of these trends will vary depending on the mix of uses and occupiers in a centre and its role and function in the hierarchy. In recent years the dominance of retail has meant that the health of many centres has been closely linked with changes in the retail sector. However, it is important to understand the wider trends as a mix of uses and services is essential if planning for successful, vital and viable centres is to be effective.

36. The economic, consumer and market trends that have most affected our centres during the last decade and which are expected to continue to shape them in the future are considered in detail in Appendix A of this report.

37. The overall effect of the changes, in terms of the mix of uses seen in centres across the UK, is an on-going decline in the comparison retail offer, and also the financial and professional services sector, as national banks reduce their network. The Food & Beverage (F&B) sector, other Leisure services and retail services are increasing and the late 2010's saw a noticeable increase in convenience provision as the national multiples opened a significant number new, small stores. Vacancies have also been increasing.

Figure 1: Composition of UK Towns 2015 - 2025



Source: LSH Analysis of Experian Goad Reports

Town Centre Trends in Anglesey

38. The retail hierarchy for IoA has been set out above and includes the two Larger Urban Retail Centres of Holyhead and Llangefni. These have been the focus for

retail and service provision and the locations most likely to attract national multiples. As a result they are also the centres most likely to experience the national trends outlined in Appendix A. This has included increasing out-of-centre retail development in recent decades and, more recently competition from online sales.

39. The eight Local Retail Centres vary in size and offer reflecting their different catchments and functions. However, all are likely to have benefitted from the expansion of the convenience retail offer in terms of smaller stores. They are also likely to be more reliant on local businesses and therefore less affected by the decisions of national multiples in terms of company rationalisations.
40. The relatively small catchment population of Anglesey's centres however, does make them vulnerable to changes in the financial sector and the closure of a centre's bank or post office may have a disproportionate effect. Those smaller centres relying on visitor trade will also have experienced impacts from changing vacation plans, initially benefitting in the immediate post-Covid period from an increase in 'staycations' but now experiencing a potential decline in visitors as the cost of living crisis reduces the number of holidays and short breaks being taken.
41. All these centres are likely to be seeing some benefits from the increase in leisure spending, especially on Food & Beverage (F&B), with demand for new space strongest in areas with high visitor numbers.
42. The smallest 'local' centres are likely to be seeing fewer changes as a result of national trends given their greater reliance on independent businesses. However, these businesses will be experiencing the challenges of rising business costs and any vacancies arising from closures as a result of business failures or owner retirement may be difficult to fill except in the strongest tourist areas.
43. In terms of non-retail uses, most centres would be expected to be seeing some increase in demand from F&B operators, particularly café and takeaway operators particularly in areas with high visitor numbers. However, the demand for additional leisure uses operated by national chains is likely to be limited by the geography of the Islands and the restricted resident population.

4. TRADING PATTERNS AND RETAIL CAPACITY

44. A key requirement for any evidence base of retail and town centre policies and strategies is an understanding of current shopping behaviour and a forecast as to how spending will change in the future, as this determines whether there is a need to allocate sites for retail development in the LDP. This is set out in TAN4 which states:

“The tests of retail need are the starting point for planning for new retail development in both development plans and development management. The quantitative needs test is based on forecasting of expenditure on a certain type of retail good (comparison or convenience for example) over a period of time, which is then assessed against the current level of provision. Any shortfall in the provision is then expressed, using expenditure per square metre calculations, as the level of new retail provision required” (para 6.1).

45. An understanding of the current performance of centres and how this may change in the future, will also affect decisions regarding the appropriate retail hierarchy and the future extent of defined town centres and Primary and Secondary Shopping Areas.

46. In practice a full understanding of the current shopping patterns and future needs can only be reached from a consideration of both quantitative and qualitative data but PPW is explicit that when assessing retail needs for the purposes of considering whether there is a requirement to allocate sites for development, precedence should be given to establishing quantitative needs, with convenience and comparison floorspace assessed separately.

47. The Welsh Government does not prescribe any particular methodology for undertaking needs assessments but paragraph 6.3 of TAN4 indicates that they usually include:

- Existing and forecasted population levels and distribution;
- Forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods;
- Sales density data for both existing and future retail provision which is realistic and benchmarked against similar retail developments in the area; and
- Catchment areas for centres.

48. In this case our quantitative assessment of retail need on Anglesey has been based on expenditure data obtained from Experian Insights relating to retail and leisure spend. This has allowed us to look at retail and leisure spend on and within Anglesey, as well as considering the main inflows and outflows.

49. Full details of the base data and key findings are presented in Appendix B to this report.

Convenience and Comparison Capacity for Retail Floorspace

50. The retail capacity assessments provided in Appendix B conclude that:

- There is no quantitative need for additional convenience or comparison retail floorspace in the Isle of Anglesey Council area and therefore there is no

requirement to allocate development sites to accommodate future retail developments; and

- The forecast 'surplus' of floorspace that is expected to arise over the plan period 2024 – 2039 is relatively small and as such, in itself does not suggest that there is a policy requirement to adjust centre boundaries or reallocate areas currently in retail use.

51. The summary capacity tables for both convenience and comparison floorspace are reproduced below:

Figure 2: Convenience Expenditure and Floorspace Capacity

	2024	2029	2035	2039
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£180.7	£175.1	£172.0	£169.9
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£180.7	£181.4	£182.3	£183.2
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£6.3	-£10.3	-£13.4
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)			Considered Separately	
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£6.3	-£10.3	-£13.4
STEP 6: CAPACITY FOR CONVENIENCE FLOORSPACE:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,537	£12,600	£12,663
(ii) Net Floorspace Capacity (sq m):	-	-503	-818	-1,055
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-719	-1,168	-1,507

Source: Appendix B5, Table B5.6

Figure 3: Comparison Expenditure and Floorspace Capacity

	2024	2029	2035	2039
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£98.8	£103.1	£112.9	£123.7
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£98.8	£108.8	£123.1	£139.2
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£5.7	-£10.1	-£15.5
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)			Considered Separately	
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£5.7	-£10.1	-£15.5
STEP 6: CAPACITY FOR COMPARISON FLOORSPACE:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq	£6,000	£6,604	£7,472	£8,454
(ii) Net Floorspace Capacity (sq m):	-	-858	-1,356	-1,834
(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
(iv) Gross Floorspace Capacity (sq m):		-1,073	-1,695	-2,292

Source: Appendix B6, Table B6.6

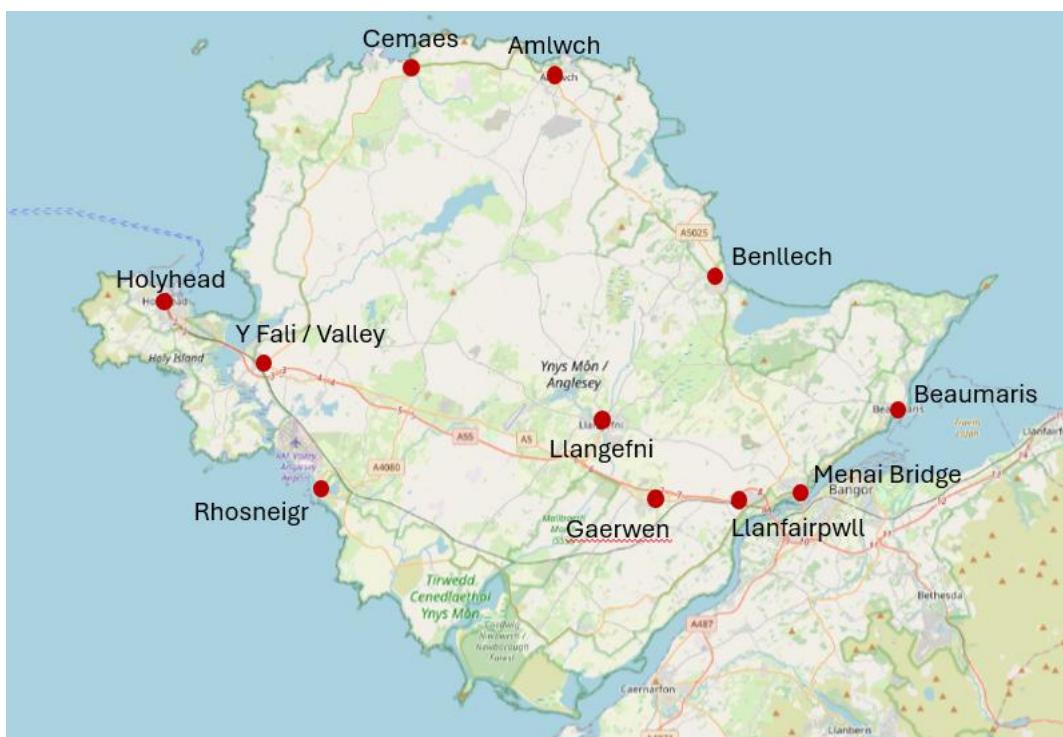
52. However, in developing retail policies and strategies for town centres for the future, it is also important to understand how a centre functions, its role and the health of its current offer. This is considered in the following section.

5. HEALTH CHECK AND TOWN CENTRE STRATEGY CONSIDERATIONS

54. Whilst the preceding section has indicated that there is likely to be a small surplus of retail floorspace across Anglesey during the LDP plan period to 2039 and therefore there is no requirement to allocate sites for future retail development based on quantitative need, it is also important to understand the current health, role and function of individual centres in order to develop policies to support their long term vitality and viability. Such an understanding may also identify other qualitative reasons for supporting retail future development in line with PPW (para 4.3.16), or opportunities to support the introduction of new uses.

55. Health checks of the ten Urban and Local Retail Centres in Anglesey are provided in Appendix C, along with a health check for Gaerwen. The location of these centres is shown below:

Figure 4: Urban and Local Retail Centres in Anglesey



56. The health checks consider:

- Diversity of Uses
- Vacancies
- Footfall

57. **The Diversity of Uses** is informed by survey data provided by Experian Goad and surveys conducted by LSH in September 2025. It examines the current number of outlets and quantum of floorspace for each commercial category, namely:

- Convenience Retail (food and non-alcoholic drinks, tobacco, alcohol, newspapers and 90% of non-durable household goods);
- Comparison Retail (all other retail goods);

- Retail Services (including health and beauty services such as beauty salons, tattoo parlours etc, post offices, dry cleaners & laundrettes, travel agents, photo processing outlets & studios, and other personal services);
- Leisure Services (including food and drink outlets, games of chance venues such as bingo halls, gambling arcades, and betting shops, sports and leisure facilities, night clubs, cinemas, theatres, concert halls and hotel/guesthouse accommodation);
- Financial & Business Services (including banks, building societies, employment and career services, legal and property services); and
- Other uses.

58. **Vacancy** levels are also informed by the Diversity of Uses studies. Analysis of their location and size of unit can indicate whether the vacancies are an indicator of over-supply or reflect natural churn in space. The length of time that a unit has been vacant may also be relevant but is not shown from the health checks.

59. **Pedestrian Flow** data has been obtained from MSCI Property Intel (MSCI) who harvest data from over 10 million mobile devices. All data is fully anonymised and GDPR compliant. Data is collected daily.

60. The data presented comprises:

- Heat maps showing monthly footfall in February and August 2024. This indicates the areas of greatest use and activity with green indicating lower levels and orange/red higher levels of footfall; and
- Graphs showing monthly footfall for a specific point in the centre over the period April 2019 to December 2024. This allows long-term trends and seasonal variations to be seen.

61. We also provide a table below showing footfall levels in the larger centres in winter (February 2024) and summer (August 2024):

Figure 5: Footfall comparisons for Anglesey Centres

	Holyhead (Market Street)	Llangefni (High Street)	Amlwch (Lon Goch)	Beaumaris (Castle Street)	Cemaes (High Street)	Llanfairpwll (Holyhead Road)	Menai Bridge	Y Fali / Valley (B4545)
February 2024	146,557	137,740	26,447	35,770	3,204	4,540	13,067	13,797
August 2024	141,430	142,388	32,358	50,995	8,292	4,498	14,790	21,466
Uplift in Summer (%)	-3%	3%	22%	43%	159%	-1%	13%	56%

62. This shows that Holyhead and Llangefni have similar levels of footfall, although Llangefni appears to see more variation across the year, with a small uplift in trade during summer months. Beaumaris is the next busiest centre, although it attracts just a quarter of the number of visits seen in Holyhead. It does however see a significant uplift in footfall during the summer (+43%).

63. Amlwch is the next busiest centre with a 22% uplift in the summer, whilst Menai Bridge and Valley have lower but similar footfall in the winter. In summer Valley's footfall increases by over 50% whereas the uplift in Menai Bridge is just 13%.

64. Cemaes and Llanfairpwll are two of the smaller centres in terms of footfall attracting less than 10,000 visitors a month even during the summer period. This is less than a tenth of the levels seen in the two Urban centres. The two centres differ though in that Cemaes has a large increase in footfall over the summer.

65. Information on footfall in Benllech, Rhosneigr and Gaerwen is more limited, although in Rhosneigr the numbers indicate considerable visitor numbers in the centre across both summer and winter months.

66. Other indicators of the health of a centre and its role are the absolute and comparative levels of turnover for convenience and comparison goods which is detailed in Appendix B to this report.

67. The level of interest from potential occupiers can also provide an indication of the likely future demand for floorspace in an area and we have therefore obtained information on retailer requirements from 'The Requirements List', a national source of such information.

Figure 6: Retailer Requirements in Anglesey (2025)

Specified Location	Operator	Operator Type	Min Sqm	Max Sqm
Anglesey (A55)	Travelodge	Leisure Services	930	3,700
Anglesey	Shaba Hair & Cosmetics	Comparison Retail	70	---
Holyhead	Kwik Fit	Retail Services	460	930
Holyhead	Cancer Research Wales	Comparison Retail	110	460
Holyhead	Domino's	Leisure Services	88	110

Source: Retailer Requirements List, September 2025

68. This shows relatively little interest from national chains in locating in Anglesey, with just two comparison retailer requirements.

69. It is important to recognise however, that this source of retailer interest is usually restricted to companies operating at a national level. Smaller, regional or local independent businesses are unlikely to publish their requirements.

70. We now turn to a consideration of the individual centres.

Holyhead (Urban Retail Centre)

71. Holyhead is the largest town centre on Anglesey with the Goad data indicating it provides over 15,700 sqm of retail and town centre uses in 148 units.

72. The area surveyed by Goad extends beyond the defined town centre to both the north and south and includes areas of secondary and tertiary space and areas with relatively high vacancy rates. As a result the current vacancy rate of 36.5% of units and 36.1% of space is likely to over-estimate of the position within the centre itself.

73. The mix of uses provided in the centre is generally good, although convenience provision and representation by national retailers is generally lower than would be expected for a centre of this size. This reflects the lack of larger footprint outlets

available within the centre, which has led to the development of out-of-town provision at the Penrhos and Holyhead Retail Parks (See Appendix C for details).

74. Financial services were well represented in December 2024 when the centre was surveyed, which is likely to reflect the town's importance as a ferry terminal and port. However, banking provision is currently limited and the Santander branch is due to close in 2026. The proposed opening of a LINK banking hub in the town centre is therefore to be welcomed.
75. The leisure services offer within the centre compares relatively well to UK averages but the range of offer is limited, with 15 of the 32 units in use as Fast Food & Takeaway outlets. This, and the above average number of public houses is likely to reflect the history of the town as a port.

Future Prospects and Policy Recommendations

76. Despite being the largest retail centre on Anglesey and its proximity to the ferry terminals, Holyhead as a town centre appears dated and is not performing particularly well, given its relatively limited retail offer. Instead the main retail offer is based in out-of-centre locations reflecting the need for larger footprint units that cannot be accommodated in the town centre, given its topography.
77. The centre does however offer a range of services and recent investment on the edge of the centre in the form of the conversion of the former Market Hall and investment in the Empire Cinema represent positive steps which could support a broadening of the leisure service offer to include more cafes and restaurants. This is likely to be assisted by the improvements currently underway at the former HSBC building on Williams Street, which is bringing holiday accommodation, restaurant, brewery and a tap room into this strategically located building (Planning Application Ref: FPL/2023/128).
78. Funding from the Transforming Towns initiative and smaller scale works bringing vacant premises back into use by Mon CF will also assist.
79. Whilst outside of the defined town centre boundary the redevelopment of 91-97 Market Street is also likely to benefit the town centre, given its location as a gateway into the centre.
80. In terms of defining boundaries for the town centre, the current mix of uses, lack of retail anchors and vacancy rates, suggests the centre would benefit from a reduction in extent. However, exact boundaries are likely to depend on the final policy wording used in the LDP. The boundary may also need to be extended in some areas to ensure key attractors are included. Consideration should therefore be given to:
 - Removing the section of Williams Street, south of Tower Gardens from the town centre;
 - Removing premises at eastern end of Boston Street from the town centre (nos. 12 and 13a);
 - Extending the town centre boundary to include the Empire cinema; and
 - Extending the town centre boundary to include 91-97 Market Street as the main gateway to the town centre.
81. These proposed changes are illustrated below:

Figure 7: Holyhead Town Centre - Proposed Changes to Boundary (north)

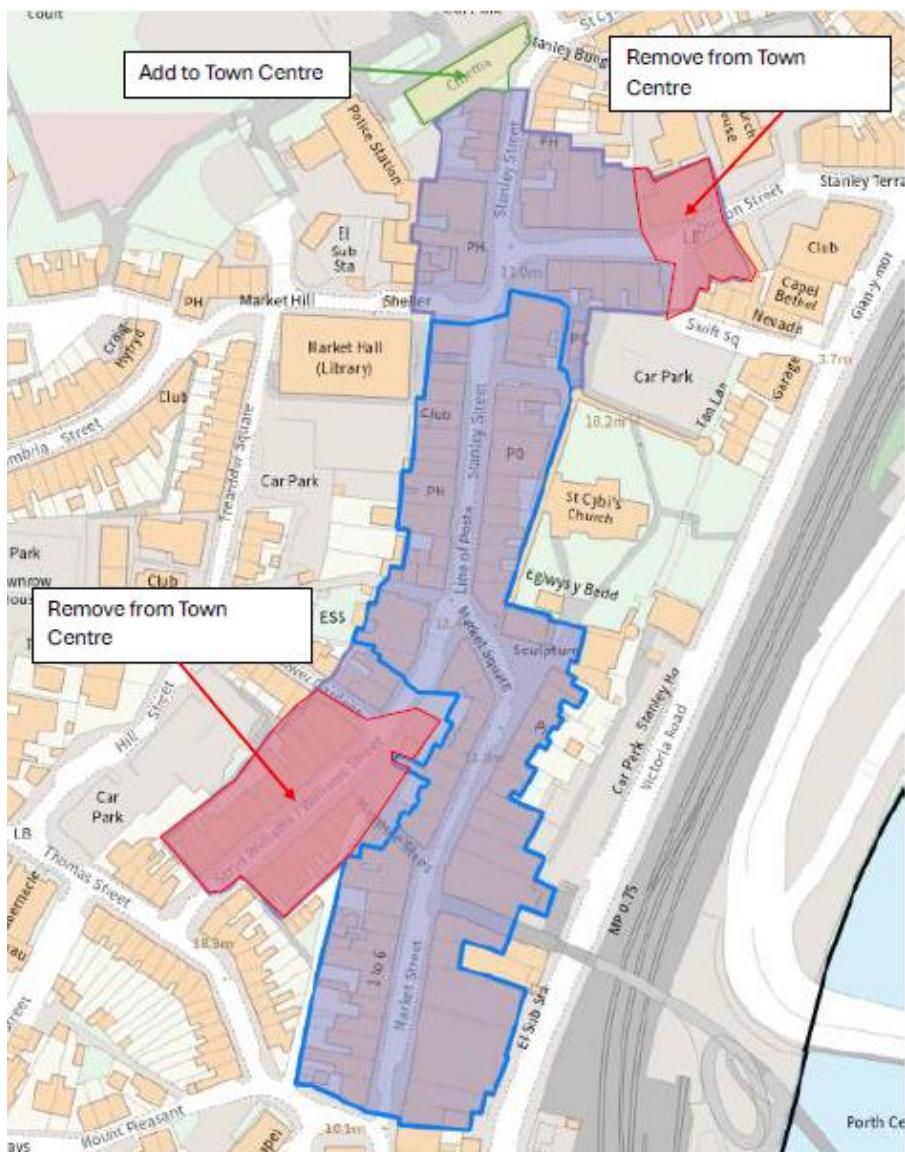


Figure 8: Holyhead Town Centre - Proposed Changes to Boundary (south)



82. We would also suggest that the need to separately define a Primary Shopping Area may no longer apply, given the benefits of attracting a mix of uses to the centre in the future.

Llangefni (Urban Retail Centre)

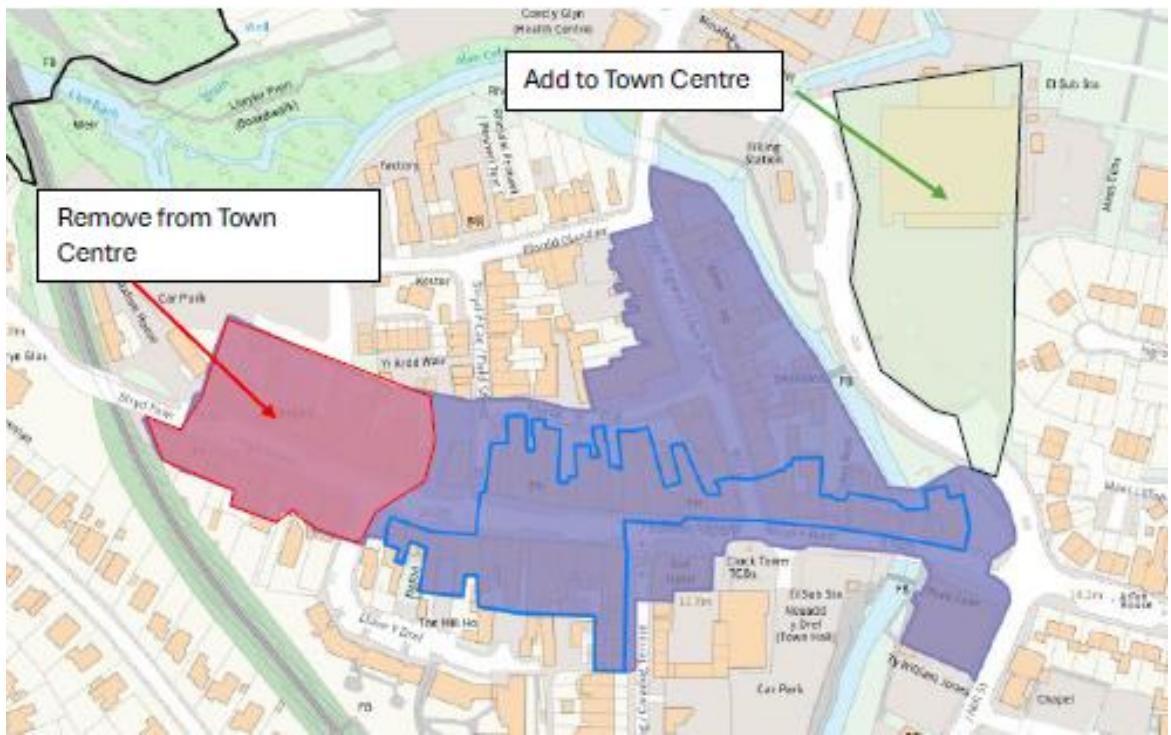
83. Llangefni is second retail centre on Anglesey with the Goad data indicating it provides just over 14,000 sqm of retail and town centre uses in 106 units. Footfall levels are similar to those seen in Holyhead. However, the Goad centre boundary extends beyond the defined town centre to include the Asda foodstore and a number of small units on Bridge Street. It also includes the former NatWest bank on Mill Street.
84. As a result the floorspace figures will overstate the convenience offer in the defined town centre, whilst there will be a small decline in the proportion of financial services offered within the centre.
85. The mix of uses provided in the centre is generally good, although the comparison retail offer is considerably below the UK average. Without the Asda the convenience floorspace is also likely to be below average. This is likely to be partly due to the out-of-centre retail offer in the town, which itself may reflect the lack of suitable larger footprint units in more central locations.
86. The retail service offer however is very strong, as is the Financial & Business services, with two national banks still represented in the centre.
87. The leisure services offer within the centre is close to the UK average in terms of floorspace but is slightly below in terms of the number of units. However, the range of offer is limited, with the majority of units occupied by Fast-food & Takeaway operators, and café and restaurant provision is limited.
88. Vacancy rates are close to the UK average in terms of units, but the unit size is generally small and so floorspace vacancy rates are lower. There is however a concentration of vacant units at the western end of the High Street.

Future Prospects and Policy Recommendations

89. Llangefni appears to be a successful town centre and, although it faces competition from out-of-centre retail units, it remains strong with two national banks and a good range of retail services. It has also seen rising footfall since 2019.
90. However, whilst vacancy rates are not of a level to be a major concern, it does appear that there is a pocket of vacant units and other uses at the western end of the High Street, suggesting this area may no longer be commercially attractive. Therefore, whilst there may be potential to increase the range of leisure services provided through the reoccupation of some of the smaller vacant units, we would suggest that the town centre boundary could be adjusted to remove this area (Nos. 25-59 and 30-58) from the town centre. This does not prevent these units continuing in retail or commercial use but also does not seek to such uses in the longer term.
91. We would also suggest that consideration should be given to extending the boundary to include the Asda store, given it is likely to be an important anchor to the centre.

92. We would also suggest that the need to separately define a Primary Shopping Area may no longer apply, given the benefits of attracting a mix of uses to the centre in the future.
93. These proposed changes are illustrated below:

Figure 9: Llangefni Town Centre - Proposed changes to Boundary



Amlwch (Local Retail Centre)

94. Amlwch Retail Centre is relatively extensive comprising 45 units primarily located to the east, west and south of the junction of Mona Street, Market Street and Salem Street. However, the retail offer is limited to small units and the centre attracts very low market shares and limited visitor spend on retail goods. The main visitor draw appears to be related to the centre's Food & Beverage (F&B) offer.
95. The centre is also lacking any Financial & Business services following the closure of the Barclays Bank in 2017 and vacancy levels are relatively high.
96. However, it is important to note that the current town centre boundary excludes the Co-op store at Lon Goch, which in practice is likely to be the main anchor of the centre, and which has seen increasing footfall since 2019. The Spar is also located outside the boundary, as is Dinorben Arms Hotel.

Future Prospects and Policy Recommendations

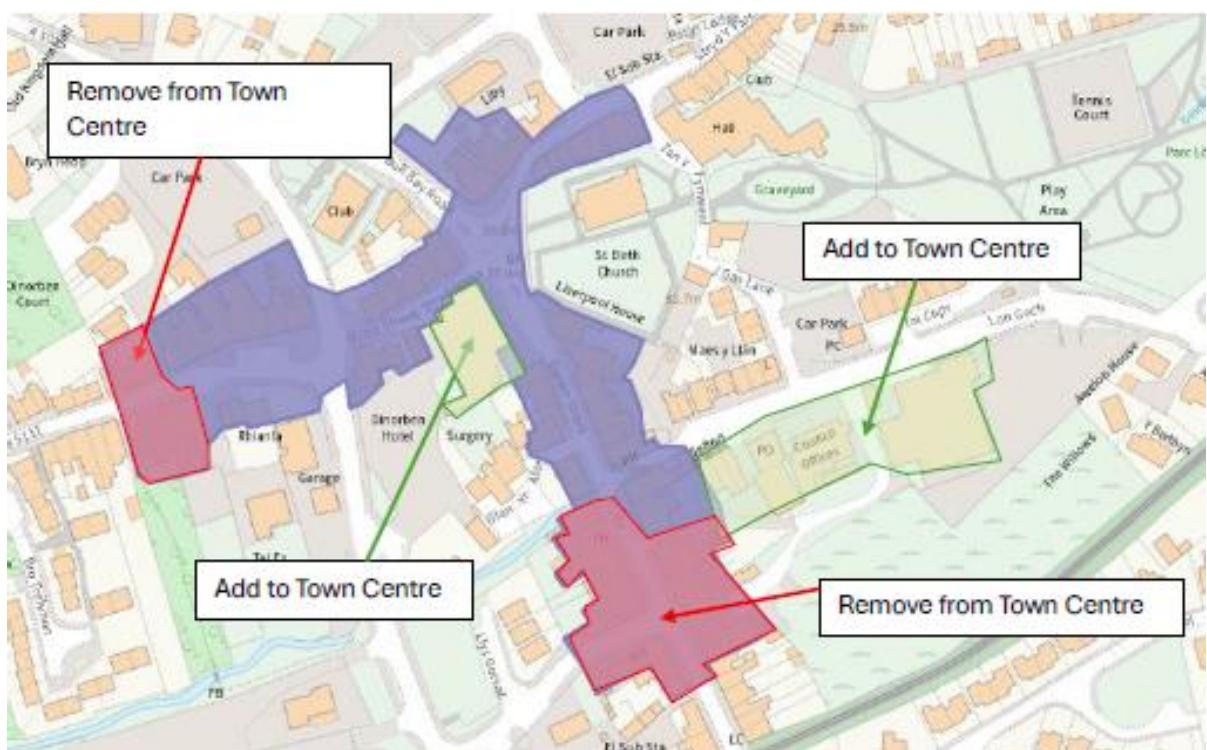
97. Amlwch Retail Centre as currently designated appears to be facing a number of challenges relating to its relatively limited offer and lack of financial services. This will not be assisted by the layout of the centre which lacks a retail centre or any major anchors.

98. However, in practice the centre has a relatively good anchor in the form of a large Co-op supermarket and an attractive setting around St Eleth's Church. Going forward we would recommend that the centre boundary is amended to include the

Spar and Co-op stores on Lon Goch, given their importance to the retail offer of the centre. The other units on the southern side of Lon Goch should also be included but there is no requirement to extend the boundary to include premises on the north side of the road.

99. The town centre boundary should also be amended to include the Dinorben Arms Hotel.
100. We would also suggest that consideration should be given to the removal of some areas currently in the town centre, including the southern end of Salem Street (potentially all units south of Lon Goch i.e. Nos. 1 – 17 and 2 – 20) and the western end of Mona Street (nos. 36-42 and 15-23).
101. These proposed changes are illustrated below:

Figure 10: Amlwch Town Centre: Proposed Changes to Boundary



Beaumaris (Local Retail Centre)

102. Beaumaris is an important tourist centre with a strong retail and leisure services offer within the Retail Centre, which is centred on Castle Street. The majority of retail occupiers are independents providing specialist goods, while the leisure services includes a high proportion of cafes, restaurants and public houses. Vacancy rates are very low.

Future Prospects and Policy Recommendations

103. Beaumaris Retail Centre is currently performing well despite a decline in visitor numbers since early 2019 and there are few vacancies. As a result, no major changes are recommended for the centre. However, minor changes to the town centre boundary are suggested to include the Town Hall and adjoining retail units (i.e. Town Hall and associated retail units, hotel and No. 17 Castle Street).
104. These proposed changes are illustrated below:

Figure 11: Beaumaris Town Centre - proposed Changes to Boundary



Cemaes (Local Retail Centre)

105. Cemaes is one of the smaller Local Centres comprising just 14 units within the defined centre. These include a single convenience store and a pharmacy that will provide important local shopping facilities for local residents, with the remainder aimed at the tourist trade which accounts for nearly half of all spend in the centre.
106. The centre also has an above average proportion of retail and leisure service outlets, but no Financial & Business Services. Two of the units are currently vacant.

Future Prospects and Policy Recommendations

107. Cemaes Retail Centre is a small but important centre for both residents and visitors and appears to be performing adequately.
108. Minor changes to the centre boundary are recommended to include all relevant No. 36 High Street and potentially the Stag Inn.
109. These proposed changes are illustrated below:

Figure 12: Cemaes Town Centre - Proposed Changes to Boundary



Llanfairpwll (Local Retail Centre)

110. Llanfairpwll is another small centre that serves the needs of both local residents and tourists. Tourists are particularly drawn to the comparison offer (James Pringle Weavers) which includes a national multiple retailer offer unusual for such a small centre. However, it also meets the needs of local residents with a Co-op supermarket.
111. The leisure service offer in the centre is also significant and at the time of the visit there were no vacant units in the centre. However, it is of note that the high but erratic footfall levels seen in the two years post-Covid have declined substantially.

Future Prospects and Policy Recommendations

112. The offer at Llanfairpwll is unusual for a small centre and provides a distinct offer for local residents and visitors alike. However, it appears to be successful with a varied offer and no vacancies. As such no changes to the current centre boundaries are recommended.

Menai Bridge (Local Retail Centre)

113. Menai Bridge Local Centre is a relatively large centre comprising 56 units and is located close to the main access to/from the mainland. As a result shops in both the defined centre and out-of-centre attract a proportion of trade from Gwynedd. This is likely to be linked to the out-of-centre Waitrose supermarket.

114. The centre has an above average proportion of comparison shops, many aimed at the tourist market and a number of specialist convenience shops complementing the Waitrose offer.
115. The centre also has a strong service offer and current footfall levels are similar to pre-Covid times. Vacancies are low.

Future Prospects and Policy Recommendations

116. Menai Bridge Local Retail Centre is one of the larger second tier centres on Anglesey and benefits from its strategic location close to the mainland, allowing it to draw trade from local residents, those living in Gwynedd and visitors.
117. The Waitrose is likely to be a key attractor for more local trade and the centre appears to have developed a complementary offer that is generally performing well.
118. As a result no changes are suggested to the defined town centre boundary.

Valley (Local Retail Centre)

119. Valley is a small retail centre split across two sites and contains a total of 20 units across the two locations. This includes 6 comparison units which is relatively high for a small centre. It also has 2 convenience stores and an above average leisure services offer including 5 Fast-food & Takeaways. There is just one recorded vacancy in the centre.
120. Footfall within the centre is fairly variable but has declined since a peak in August 2021.
121. The centre as defined appears to serve a primarily local catchment, but the convenience offer is attracting around 20% of trade from visitors, reflecting the summer uplift in footfall.
122. However, it should be noted that the centre boundaries do not include all retail and other commercial uses and the boundaries appear to be relatively arbitrary.

Future Prospects and Policy Recommendations

123. Valley Local Centre appears to be performing in line with expectations, with the retail offer aimed at meeting local residents' needs, also serving visitors during the summer period. However, there are additional retail and leisure service uses close to the Station Road/Holyhead Road junction that could be included in the centre, given they will be functioning as part of it. We therefore recommend that boundaries for this centre are reviewed and our proposed changes are illustrated below:

Figure 13: Valley Town Centre - Proposed Changes to Boundary



Benllech (Local Retail Centre)

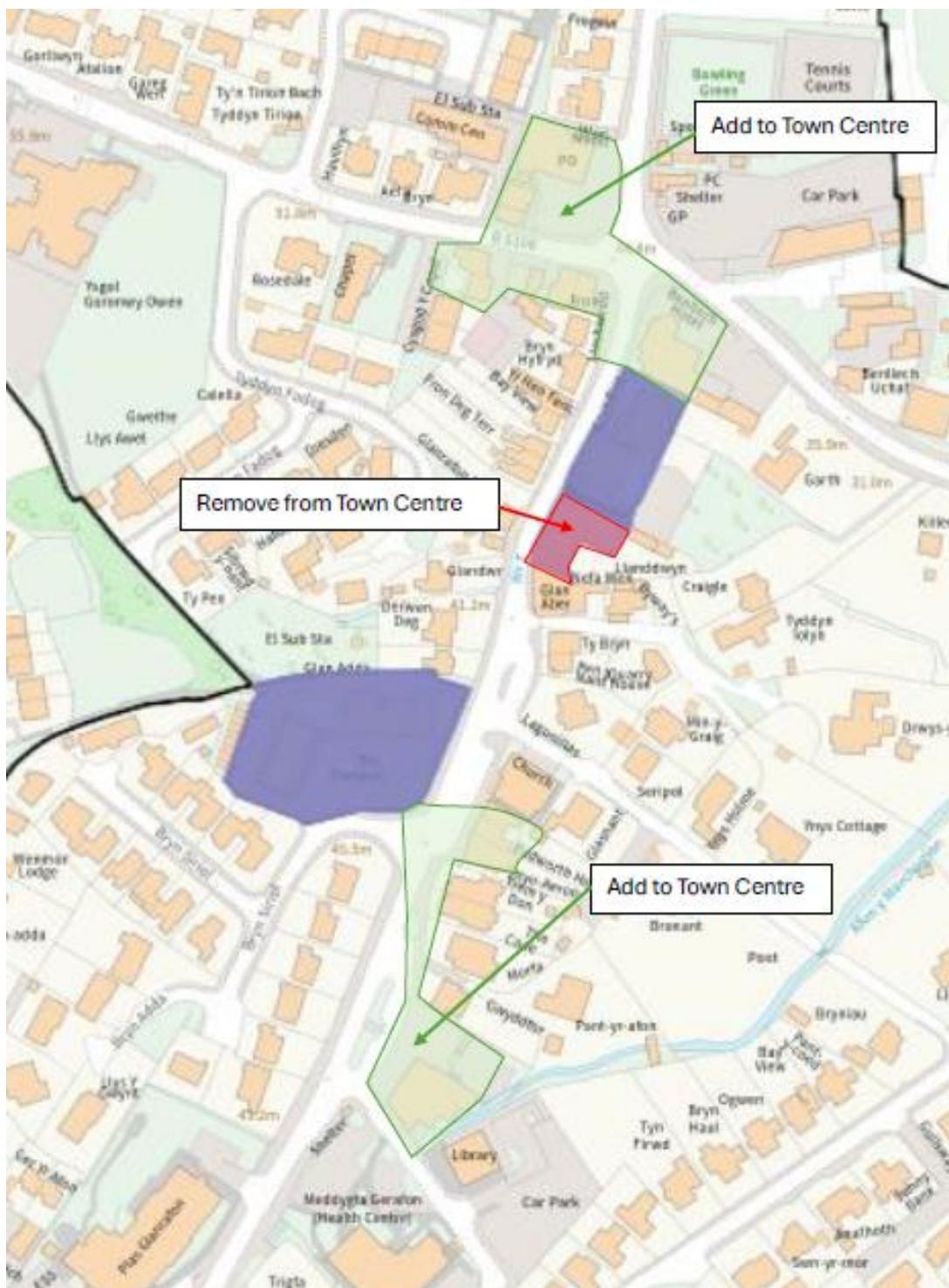
124. Benllech is another small Retail Centre, split across two locations and as defined only contains 10 units. This includes 4 comparison outlets, 3 fast-food/takeaways, a café and a restaurant. There are no vacancies.
125. The expenditure data suggest these outlets attract a considerable proportion of their trade from visitors. However, the units identified perform less well in terms of market shares than the retail and leisure operators located outside of the defined boundaries.

Future Prospects and Policy Recommendations

126. The current boundaries for Benllech appear to be out-of-date and do not accurately reflect the retail and leisure uses within the town. Both the Co-op and Tesco Express which anchor either end of the centre are currently considered to be out-of-centre yet would be expected to be the main attractors of trade and linked shopping trips, particularly for local residents. As a result we consider that retention of these uses is likely to be important in maintaining the draw of the centre in the future.
127. We would therefore recommend that the town centre boundaries are extended to include these and adjoining retail and leisure uses, in order to recognise their roles in contributing to the vitality and viability of the centre. The centre could continue to

be defined as two separate sections but we would recommend that the boundaries are amended as shown below:

Figure 14: Benllech Town Centre - Proposed Changes to Boundary



Rhosneigr (Local Retail Centre)

128. Rhosneigr is a very unusual centre, comprising just 5 units but including 2 comparison outlets, one occupied by a national multiple retailer (Fatface). This reflects the importance of visitor trade to the centre, which contributes at least 70% of convenience spend as well.

Future Prospects and Policy Recommendations

129. Retaining a centre to serve the Rhosneigr community and visitors is clearly important and as such it is recommended that current designation is retained. However, the boundary of the centre could be revised to include the additional retail use on High Street (currently Janet Bell Gallery).
130. The proposed change is illustrated below:

Figure 15: Rhosneigr Town Centre - Proposed Change to Boundary



Gaerwen

131. Gaerwen is not identified in the JLDP as a retail centre, but it provides a total of 7 units across two sites in the village. These include 2 convenience stores and various service uses, which primarily serve the local community.

Future Prospects and Policy Recommendations

132. It is recommended that Gaerwen is defined as a Small Retail Centre and a town centre boundary is defined. This could cover the two main areas with retail and commercial uses is defined (see Figure 48, Appendix C) or seek to concentrate the centre focus around the A5/Chapel Street crossroads, as the preferred location should new retail or commercial uses be proposed in the future. This latter approach however would mean that the Morrisons Daily would continue to be considered as an out-of-centre retail unit and nay impacts on it would not be a planning consideration.

133. These proposed changes are illustrated below:

Figure 16: Gaerwen - Proposed Town Centre Boundary



6. RETAIL AND TOWN CENTRE POLICY RECOMMENDATIONS

134. Our quantitative capacity analysis has identified that the current retail provision in Anglesey is likely to be sufficient to meet expected needs during the plan period to 2039 and there is no requirement to allocate new sites for retail development based on quantitative needs.
135. Our review of the defined centres in Anglesey has also indicated that whilst some changes to town centre boundaries are required in some centres, overall provision appears to be suitable for the centres needs and there is no qualitative need to allocate new sites for development.
136. In the light of this we have also reviewed the current retail hierarchy on the Island and would suggest that in practice the centre appears to have three tiers of retail provision:
 - Urban Centres (Holyhead and Llangefni)
 - Local Centres (Amlwch, Beaumaris, Benllech (with revised boundaries), Llanfairpwll, Menai Bridge, Valley (with revised boundaries))
 - Small Local Centres (Cemaes, Gaerwen, Rhosneigr).
137. However, whether these latter two levels of centres need to be distinguished will depend on future policy wording. If the proposed policies are the same for both levels, then it may not be necessary to distinguish between the Local and Small Local Centres.

Policy Review

138. Turning now to the current policies in the JLDP, we outline below our thoughts regarding their need for revision:

Strategic Policy PS 15: Town Centres and Retail

139. In addition to updating the list of defined centres as outlined above, the wording of this policy will need updating to:
 - Remove the reference to the need for a set quantum of new retail floorspace; and
 - Review/remove the reference to the retention of retail uses in the Primary Shopping Areas, given the importance of encouraging mixed uses. An alternative range of uses considered acceptable may be referenced instead.
140. The remaining parts of the policy remain appropriate.

Policy Man 1: Proposed Town Centre Developments

141. This policy will need rewording depending on whether Primary Shopping Areas are retained.
142. Consideration should also be given to whether the reference to retail uses should be expanded to encourage an appropriate mix of uses suitable for a town/local centre.

143. The reference to compliance with the sequential test should be retained.

Policy Man 2: Primary Retail Areas (Retail Core)

144. It is recommended that this policy is revised. Even if PSAs are retained, the need for marketing evidence should be reviewed given that in many areas it is not necessary to do this to know it will be difficult to relet a retail unit.

Policy Man 3: Retailing Outside Defined Town Centres But Within Development Boundaries

145. This policy is considered to remain generally appropriate, but we would suggest that the initial reference to 'shops' may need clarification and could be more specifically defined.

Policy Man 4: Safeguarding Village Shops and Public Houses

146. Whilst we agree with the principle behind this policy, we would recommend that the marketing period is reviewed and/or alternative approaches are included to assessing viability, as it is not desirable for any unit to remain vacant for in excess of 12 months if it can be avoided.

Policy Man 5: New Retailing in Villages

147. We would recommend that the reference to retailing is reviewed, as it may be appropriate to encourage other commercial/town centre uses in particular locations. Alternatively a separate policy to consider such developments may be required.

Policy Man 6: Retailing in the Countryside

148. As with Policy Man 5 we would suggest that the reference to retailing is reviewed, as it may be appropriate to encourage other commercial/town centre uses in particular locations. Alternatively a separate policy to consider such developments may be required.

---- Ends ----

Isle of Anglesey Retail Study

Appendix A – Economic and Market Trends

Prepared for:

Isle of Anglesey County Council

December 2025

lsh.co.uk

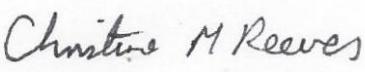


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This report meets the PDF/UA (Universal Accessibility) standard, which is equivalent to the WCAG 'AA' digital standard.

Prepared by:

Christine Reeves

Signed: 

For and on behalf of Lambert Smith Hampton

Issued: December 2025

Contents

1. INTRODUCTION	4
2. UK ECONOMIC OUTLOOK	5
3. RETAIL AND LEISURE SPENDING	6
4. RETAILER BUSINESS MODELS AND REQUIREMENTS	12
5. LEISURE TRENDS AND EXPENDITURE	16
6. THE PROPERTY MARKET	25
7. THE FUTURE FOR OUR TOWN CENTRES AND HIGH STREETS	28

1. INTRODUCTION

1. This Appendix report provides information on the key economic, consumer and property market changes that have driven the changes in the retail and leisure sectors in the UK over the last decade. It also looks at the changes expected in the future and considers how town centres can respond to these dynamic trends to remain competitive and enhance their overall vitality and viability.
2. The report draws on a wide range of data sources including Lambert Smith Hampton's own research and is structured as follows:
 - **Section 2** considers the UK economy and economic outlook;
 - **Section 3** considers what this means for spending on retail activities and how this is expected to change in the future. This includes looking at the role of online shopping and the expected changes in markets, both of which are important areas of spend which divert trade from physical shops;
 - **Section 4** looks at the retail sector and how retailer business models and requirements are changing;
 - **Section 5** looks at the commercial leisure sector. It considers how expenditure is forecast to change in the future and what this is likely to mean for key leisure sectors including Eating Out/Food & Beverage (F&B), cultural and recreational and sporting services sectors;
 - **Section 6** looks at the effect this is having on the property sector and vacancy rates. This includes considering how town centres are faring compared with out of centre retailing; and
 - **Section 7** looks at how these trends are likely to affect our high streets and town centres in the future.

2. UK ECONOMIC OUTLOOK

3. Over the past five years, the UK economy has endured multiple shocks including the COVID-19 pandemic, high inflation, elevated energy costs, supply chain disruptions, and trade tensions. Despite these challenges, the Office for Budget Responsibility (OBR) (Economic and Fiscal Outlook – March 2025) projects a gradual economic recovery, with real GDP growth expected to rise from near zero in 2023 to 1% in 2025 and 1.9% in 2026. It is expected to stabilise at an average potential growth rate of 1.75% through 2027/28/29, however, uncertainty remains high due to UK labour force, GDP and productivity data as well as global geopolitical disruptions on trade policy.
4. Inflation, measured by the consumer price index CPI, is forecast to increase from 2.5% in 2024 to 3.2% in 2025, peaking at 3.8% in July 2025, driven by energy price caps, food prices, and utility bills. From mid-2026 inflation is expected to return to the Bank of England's 2% target as these pressures ease.
5. Experian Business Strategies (Experian) predict in their latest Retail Planner Briefing Note 22 (March 2025) ('RPBN22') a slightly stronger GDP outlook for 2025, bolstered by early-stage government spending and a modest rebound in retail sales, particularly in discretionary consumer categories, as real incomes begin to recover.
6. However, consumer confidence remains 'fragile' meaning that households will take a more cautious approach to spending, at least in the short term. There are also uncertainties over how the US government's recent increase on global trade tariffs will impact on the global economy, which will ultimately increase the costs of many household products in the UK. It is for this reason that Experian has downgraded their UK retail sales forecasts to 2040 from what was published in last year's RPBN (RPBN21).
7. The 2024 Autumn budget also increased business costs with employer National Insurance rates up by 1.2% to 15% from April 2025, while the threshold for contributions lowered from £9,100 a year to £5,000. The national living wage (21 and over) also increased by 6.7%.
8. This has all contributed to increased operational costs and tax obligations and retailers have responded by workforce reductions and redundancies, which are thought to hit entry-level jobs the most. The British Retail Consortium revealed that 160,000 retail positions could be at risk over the next 3 years.
9. As a result of these trends, UK households are currently experiencing the biggest fall in real disposable income and living standards in decades and there are ongoing employment uncertainties. This will have direct impacts on household spending on retail goods and leisure services, and on the sales performance of retailers and leisure operators.

3. RETAIL AND LEISURE SPENDING

10. The above trends have a direct impact on disposable income and consumer confidence and this is reflected in the forecasts for future spending on retail and leisure goods and services. This in turn will have a direct effect on town centre businesses.

Convenience Spend

11. Convenience expenditure refers to the money spent on food, non-alcoholic drinks, alcohol, tobacco, newspapers and 90% of non-durable household goods, including items such as cleaning materials, and kitchen disposables¹. They are generally low-cost items, purchased frequently and usually relatively locally, with the main outlets being the supermarkets operated by the national multiples such as Tesco, the discounters Aldi and Lidl and the smaller shop operators such as the Co-op and Spar. The category also includes spend in independent retailers and specialist food and drink outlets.

12. As consumers have become more affluent, with more disposable income, the trend has been for spending on convenience goods to remain relatively static, with the proportion of total spend reducing in real terms (i.e. excluding the effects of inflation). However, when budgets become tight, some reduction in spend will be seen with customers becoming more price-conscious and seeking to reduce the cost of their weekly shop, either by changing what they buy or where they buy it.

13. According to Experian, the impact of COVID-19 resulted in a significant +6.8% surge in spend per head in 2020, as options for eating out were reduced but this was followed by a contraction of -1.3% in 2021. Since then there has been negative growth of -5.0%, -3.5% and -1.8% in 2022, 2023 and 2024 respectively.

14. In 2025 Experian forecasts a further reduction in spend at -0.8% but this reduces to -0.6% in 2026. Longer term it is expected to remain below 0% at -0.3% per annum for 2027-2031 and then -0.2% per annum to 2040.

Comparison Spend

15. Comparison expenditure refers to the money spent on all other retail goods, with the relative importance of key types of spend in the UK set out below.

¹ Experian Retail Planner Briefing Note 22 (RPBN22) (March 2025)

Table 1: Average UK Spend per Head on Comparison Goods in 2023

Average Comparison Spend per Person in 2023 (Total)	UK Average Spend (£)	UK Average Spend (%)
Clothing materials and garments	£847	20.8%
Appliances for personal care	£442	10.8%
Furniture and furnishings; carpets and other floor coverings	£416	10.2%
Games, toys and hobbies; sport and camping; musical instruments	£366	9.0%
Audio-visual, photographic and information processing equipment	£279	6.8%
Shoes and other footwear	£173	4.2%
Pets and related products	£166	4.1%
Jewellery, clocks and watches	£162	4.0%
Major household appliances (electric or not)	£160	3.9%
Books and stationery	£156	3.8%
Medical goods and other pharmaceutical products	£138	3.4%
Tools and miscellaneous accessories	£130	3.2%
Glassware, tableware and household utensils	£126	3.1%
Household textiles	£108	2.6%
Gardens, plants and flowers	£107	2.6%
Recording media	£95	2.3%
Other personal effects	£70	1.7%
Therapeutic appliances and equipment	£53	1.3%
Bicycles	£29	0.7%
Small electrical household appliances	£23	0.6%
Materials for maintenance and repair of the dwelling	£23	0.6%
10% of Non-Durable household goods	£11	0.3%

Source: RPBN22, Appendix 5

16. This shows the relative importance of sales for different types of comparison goods, with clothing and garment sales representing the main spend area and accounting for around a fifth of all comparison spend. The top five expenditure categories of (i) clothing, (ii) appliances for personal care, (iii) furniture and furnishings / carpets & other floor coverings, (iv) games, toys and hobbies/ sport and camping/ musical instruments and (v) audio-visual, photographic & information processing equipment combined account for 58% of all comparison spend.
17. The presence or absence of retail outlets selling these types of goods in an area will therefore be a major determinant in the amount of comparison expenditure retained in a particular area or lost to stores elsewhere. It is also the case that these expenditure figures make no allowance for online or other non-store-based purchases and some categories of spend will be more likely to be made online than others.
18. In terms of changes to expenditure per head on comparison goods, the trend has generally been one of growth as consumers have become more affluent and have more disposable income. However, much of this is discretionary spend and it can be more influenced by economic variables and confidence in the short term than is seen with convenience spend. Comparison goods are also more likely to be purchased online and to be sourced from non-shop locations.
19. The most recent Experian estimates and forecasts for UK comparison spend per head show that after the growth in 2021 and 2022 (+6.8% and +3.4%) which largely offset the impact of Covid in 2020 (-8.3%), there has been negative growth to 2024 (-3.2% in 2023 and -1.0% in 2024). The predicted (per capita) growth for

2025 is a nominal +0.1%, rising to +1.3% in 2026 and then around to +2.5% per annum to 2031 and +2.6% up to 2040.

Non-store Retail Sales (Special Forms of Trading)

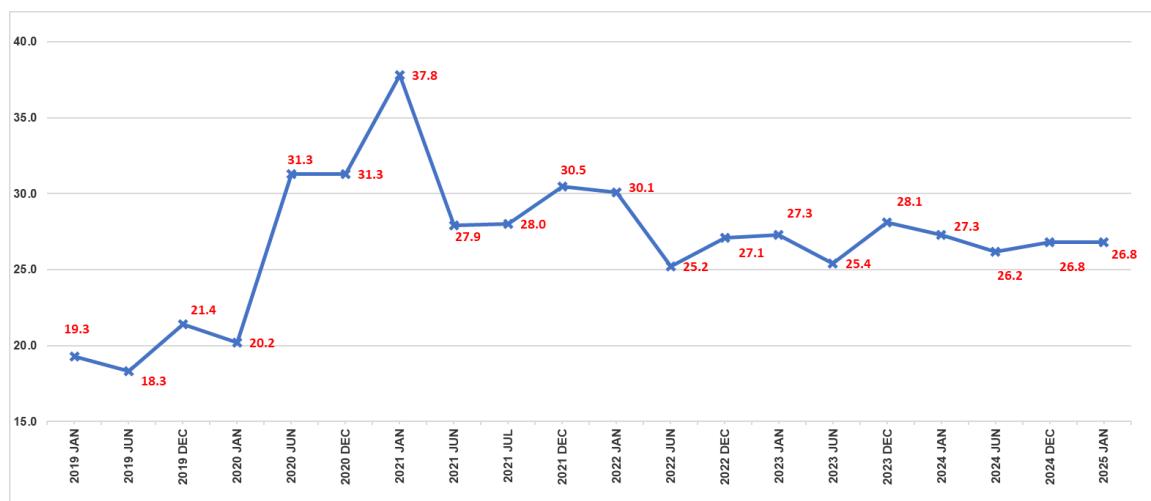
20. In addition to spending in shops, an increasing proportion of retail spend is made in other ways that do not require a visit to a physical shop. Historically this predominantly related to sales in street and temporary markets and mail order but now relates primarily to online spending. Collectively these are referred to as 'Special Forms of Trading' (SFT).

Online Spending

21. The growth in non-store retail sales through online purchases has had the most significant impact on consumer spend and behaviour over the last decade, and on our High Streets and traditional shops, although it should be recognised that the proportion of sales varies between different types of goods.

22. As the figure below shows, SFT which in 2006 had a market share of just 5.4% (as a proportion of total UK retail sales) increased to 21.4% at the end of 2019. During the pandemic this rose sharply to a maximum 37.8% in early 2021 but has decreased since then to around 26%. In other words, online spending now accounts for over one in every four pounds spent on retail goods.

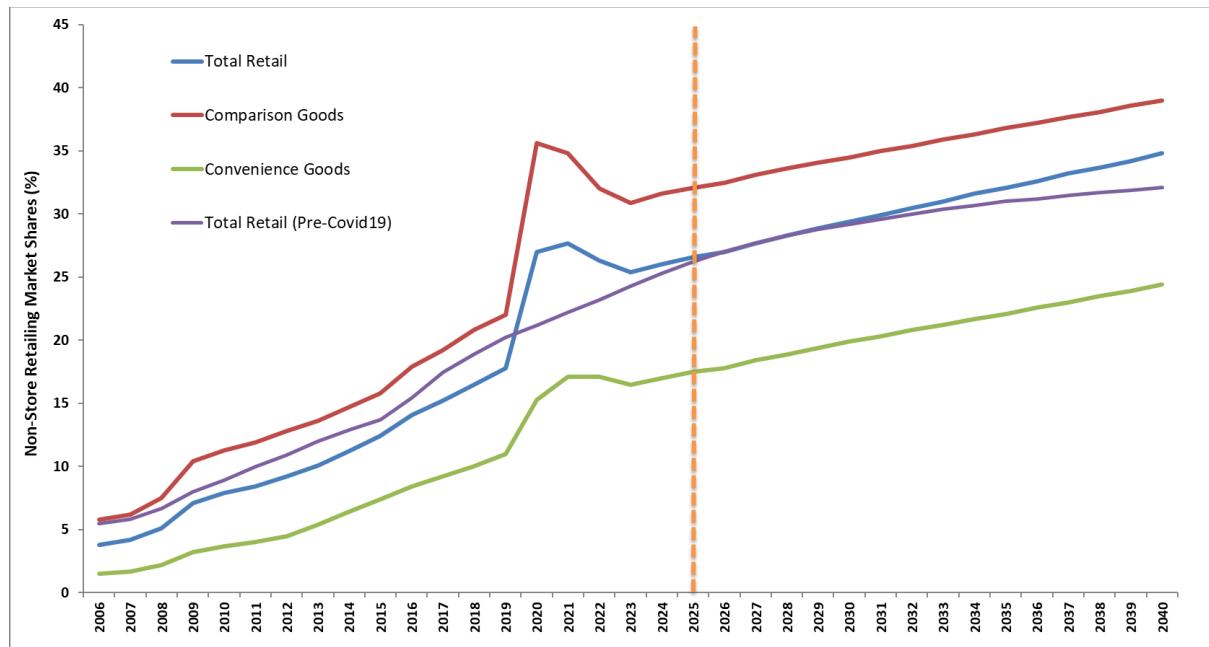
Table 2: Internet Sales as a Percentage of Total Sales (%) (to January 2025)



Source: ONS: Retail sales, Great Britain: March 2025

23. In terms of SFT's overall market share (as a proportion of total UK retail sales) Experian estimates that comparison and convenience goods retailing achieved market shares of 35.6% and 15.3% respectively in 2020. They further estimate that comparison and convenience goods retailing will attain market shares of 32.1% and 17.5% respectively in 2025.

Figure 1: Estimated and Projected Market Shares of Non-Store Retail Sales (SFT), 2006-2040 (Not Adjusted)



Source: Experian Retail Planner Briefing Note 22 (March 2025)

24. Looking forward Experian forecasts indicate that total SFT market shares will increase to 34.8% by 2040, with comparison and convenience goods non-store retail sales are reaching 39% and 24.4% respectively.
25. Experian attributes this to the rising share of internet sales. The ease of online purchasing has continued to improve rapidly, with technological advances, particularly around smartphones and connectivity. Faster delivery times, including same day delivery, and easier returns processes have also encouraged the trend. The expansion of 5G and fibre networks should ensure the momentum is maintained over the medium term. The proliferation of the buy now pay later business model and price tracker sites is also supporting growth.
26. With the growth predicted in online sales and market shares, it is clear that high streets, town centres and physical retailers will need to work even harder to retain their existing customer base and attract new customers over the short, medium and long term.
27. In terms of forecasting the potential capacity for new physical retail floorspace, Experian estimate that approximately 25% of all SFT sales for comparison goods and 70% for convenience goods are still sourced through traditional ('bricks-and-mortar') retail space, rather than through 'virtual' stores and/or 'dot com' distribution warehouses. On this basis, Experian adjust their SFT market shares downwards for total retail to 16.9% in 2025, 18.9% by 2030 and 22.9% by 2040.
28. In summary, both retailers and high streets will need to compete for shoppers and expenditure through a variety of means including creating experiences that will attract the interest and attention of potential consumers across all age and socio-economic groupings.

Street Markets

29. Street markets are another form of SFT and, although spend at such locations is small compared with online, the presence of a street market can be an important draw in a centre, adding to the variety and experience of visiting. As such markets can play a significant role in the success of town centres.
30. The National Association of British Market Authorities (NABMA) is the leading markets organisation in the UK and has been promoting the interests of its members for over 100 years. In 2022 it undertook a National Survey of Markets which indicated that:
 - Market numbers have not changed significantly since the early 2000s, with 1,150 reported in 2005, 1,124 in 2009 and 1,173 in 2017/18;
 - During the same period the number of traders has fallen from 45,000/46,000 in 2009 to 32,000 in 2018. Further, more of the traders are only working on a part-time basis and are going to market events rather than traditional markets;
 - The number of people working in retail markets has also declined from around 95,000 to 57,000 in the same period;
 - There are no figures for the numbers employed in 2022, but they are believed to have declined further;
 - Traders are generally older, with 88% of survey respondents aged between 41 and 60. Only 8% are under 40;
 - Nearly 85% of markets are operated by local authorities, up from around 60% in 2009. There has been a corresponding decline in those operated by the private sector;
 - Stall occupancy rates have declined from an average 77% in 2018 to 72% in 2022. The highest occupancy rates (78%) are seen in indoor markets, while the greatest decline has been in street and outdoor covered markets;
 - Many markets are operating at a loss and this has increased from 21% in 2018 to 27% in 2022; and
 - Some markets are benefitting from investment including 25 which have received a total of £127m from the Government through various funding initiatives.
31. This suggests markets are becoming smaller and have fewer operating stalls. More of the traders are also only operating on a part-time basis.
32. However, markets remain significant assets to town centre vitality and support local businesses. They can generate footfall increases of around 25% for town centres and increase retail sales, with significant numbers (55% to 71%) of market visitors spending money in other shops according to research in London.
33. Markets also provide affordable and flexible workspaces and provide a unique opportunity to trade, test business ideas, or showcase new products.
34. Markets can also:
 - create job opportunities for people to access, or return, to work;
 - help build the distinctive identity of a neighbourhood and community;
 - support social cohesion, helping break down stereotypes and bridge differences; and

- provide access to fresh and healthy food including for those on low incomes.

35. Indoor and street markets have also provided the basis for new businesses to become established for a considerable period. The first M&S famously opened in Newcastle's Grainger Market in 1895, for example. However, there has recently been a new emphasis on empowering younger people to start out in businesses as market traders.

36. One initiative, Teenage Markets, was created to give young people a free platform to showcase their creative talents. There is now a fast-growing network of traders and performers taking part in Teenage Market events across the UK. In October 2023, there were 56 UK locations being used for Teenage Markets, with venues including market halls, street markets and events.

37. The Teenage Market website summarises the benefits to young people and the wider community, noting “When combined, the creative fusion of specialist retail and live performance creates a thriving and bustling marketplace which succeeds in attracting a new generation of shoppers and visitors to our nation's local markets.”

38. Markets can therefore play an important part in supporting the local economy and community and assist small businesses, including those led by women, young people and minority groups.

39. However, just like other retail businesses, markets need to adapt to meet present day needs. Traditional markets need to be modernised to make them fit-for-purpose, including meeting the hygiene standards now required for food preparation and sale.

4. RETAILER BUSINESS MODELS AND REQUIREMENTS

40. The recent challenging economic conditions and growth in online sales have had a significant and permanent impact on consumer shopping and spending behaviour. Retailers in the recent past have faced challenges across the supply chain, inflationary pricing, economic uncertainty and geo-political factors.

41. This has created significant challenges for traditional “bricks-and-mortar” retailing and the high street. Consequently, national multiple retailers are having to constantly review and rapidly adapt their business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand. As retailers adjust to “new normal”, key trends shaping the future of retail, include:

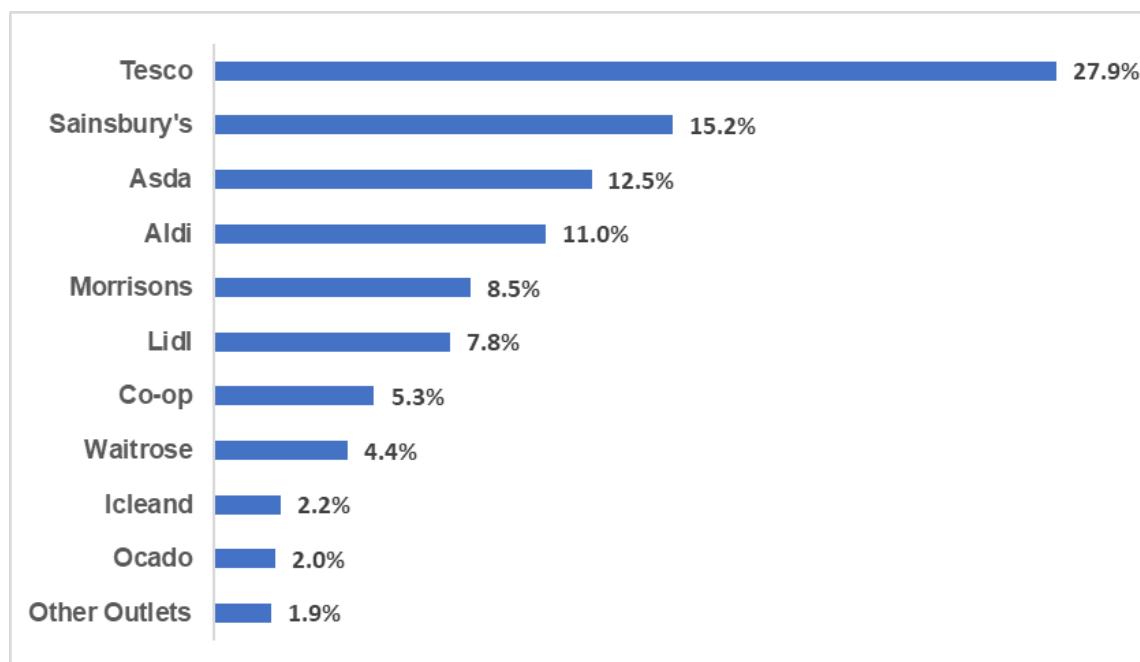
- **Hybrid ‘phygital’ shopping** - through seamless integration across online, in-store, mobile, social and virtual platforms is now essential;
- **AI driven personalisation** - increasingly retailers are using AI for smarter chat bots, personalised recommendations and data-driven promotions to enhance customer engagement;
- **Social commerce** - where social media is not just for marketing. Brands now sell directly through platforms leveraging influencer partnerships and sentiment analysis to drive sales conversions;
- **Monetising retail spaces** - where physical stores and websites are doubling as advertising channels and with services such as ‘Click-and-collect’ and ‘Buy Online, Pick Up In Store’ (BOPIS) improving consumer convenience; and
- **Sustainability and the circular economy** - eco-conscious consumers are embracing reuse, repair and recycling prompting retailers to prioritise green packaging, ethical sourcing and transparency.

42. The grocery market illustrates the shift vividly. Traditional giants like Tesco and Sainsbury's have focussed on online and convenience formats over the last decade while large store developments have all but halted.

43. At the same time the number of shops operated by the deep discounters ALDI and Lidl have surged. ALDI now ranks among the top four UK grocers overtaking Morrisons.

44. The discounter offer has also changed with the average store size gradually increasing from the 1,200 – 1,500 sqm net previously seen, as the range and offer within the shops also increases. This includes the introduction of bakery counters in Lidl and the development of specialist and high quality food ranges, especially during holiday periods.

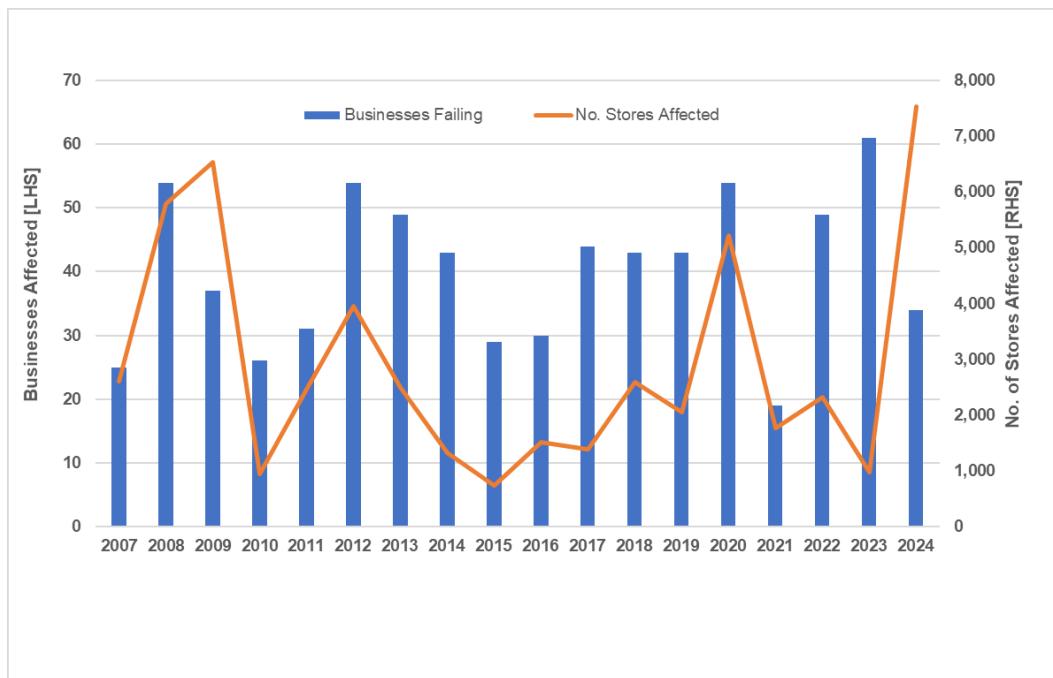
Figure 2: UK Grocery Market Share



Source: Kantar (April 2025)

- 45. The non-food retail sector is under intense pressure and the pandemic has accelerated the demise of a number of high profile retailers. National retailers/multiples with extensive high street store portfolios are struggling to maintain market shares and remain profitable in the increasingly competitive environment created by falling sales and increasing costs/debt.
- 46. Many well-known retailers have either closed or have significantly reduced their store portfolios in recent years, including Debenhams, Oasis, Warehouse, Laura Ashley, the Arcadia Group and Cath Kidston. John Lewis also announced the closure of four department stores and four 'At Home' stores and Marks & Spencer continues to rationalise their store portfolio. The first half of 2025 also saw the sale of WH Smith's high street store portfolio and announcements from Poundland regarding 25 store closures.
- 47. The challenges facing consumers, businesses and town centres have continued to intensify since 2020. The latest industry research shows that over 13,479 stores closed in 2024 due to businesses entering administration, with circa 169,400 jobs lost. Data for the first two months of 2025 identified 1,483 store closures and 6,689 job losses. These figures are predicted to jump to 17,349 store closures, with 14,660 expected to be independent retailers, and 201,953 job losses by the end of the year.
- 48. This continues the trend from 2024 which saw the highest number of store closures due to major retailer failures, at 7,537. This exceeded the losses seen after the 2008 recession and immediately after the pandemic (5,200). The number of business failures however was lower, reflecting the size of the companies affected.

Figure 3: Major Retail Failures (2007 – 2024 (June))



Source: Centre for Retail Research (April 2025)

49. According to Centres for Retail Research, the main drivers for store closures are linked to “changed customer shopping habits, inflation, rising energy costs, rents and business rates” (UK Retailing Outcomes 2024: Lost Stores and Lost Jobs, January 2025). In addition, and more specific to predicted closures in 2025 are factors such as the cost of crime (from shoplifting) and increased labour costs (increase in the national living wage, increase in the minimum wage for 18- to 20-year-olds, and increase in employers NIC).
50. Retailers are also grappling with reduced business rates relief down from 75% to 40% and an uneven playing field, where High Street trading is costlier than online or out of town alternatives.
51. However, while national retailers/ multiples account for the greatest proportion of job redundancies in the retail sector, independents (operators with one to 3 outlets) accounted for 65% of store closures in 2024, and 75% in 2023 according to Centres for Retail Research.
52. In addition ‘Bricks and mortar’ retailers are having to absorb higher than inflation increases in year-on-year occupancy costs (for example, rents, business rates, service charges, utility bills, staff costs, etc). This outpaces sales growth for many retailers, eroding profitability and resulting in more store closures.
53. However, technology adoption offers a lifeline especially for agile small and medium enterprises who are leveraging digital tools to expand their reach and track consumer trends, but challenges like digital skills gaps and technology affordability limit this potential, reinforcing the urgent need for transformation across the sector.
54. In summary, although some retailers are better positioned to cope with the growth in online shopping and the shifts in consumer behaviour and preferences, many

are now struggling to position themselves quickly enough to absorb rising costs and engineer the vital transition to a more technology-focussed business model.

5. LEISURE TRENDS AND EXPENDITURE

55. Having considered how retail and shopping in town centres has changed in recent years in the previous section, it is also important to consider how changing trends within the commercial leisure sector may affect the demand for new leisure uses and facilities, as vital and viable town centres can only be achieved by providing a wide mix of uses.

56. The main leisure, entertainment and cultural uses identified as town centre uses in the NPPF are:
“...leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); ... and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).” (NPPF, Annex 2).

57. The starting point for this assessment is a consideration of the relative importance of various types of activity in terms of likely spend and expected growth. We then consider the key town centre leisure uses in more depth.

Leisure Expenditure

58. Leisure spending is an important element of household expenditure and Experian suggests that the average spend per head in the UK equates to around £3,001 per annum, based on their definition of leisure which comprises:

- Recreational and sporting services (COICOP 9.4.1)
- Cultural services (COICOP 9.4.2)
- Games of chance (COICOP 9.4.3)
- Restaurants, cafes etc (COICOP 11.1.1)
- Accommodation services (COICOP 11.2)
- Hairdressing salons & personal grooming (COICOP 12.1.1)

59. This compares with the average UK spend per head on convenience and comparison goods of £2,913 and £4,152 respectively (with all figures inclusive of spending online and through other Special Forms of Trading).

Table 3: UK Leisure Spend per Person

UK Spend per Person (per annum)	Spend per Annum (£)	% of Total Leisure Spend
Accommodation services	£258	8.6%
Cultural services	£436	14.5%
Games of chance	£147	4.9%
Hairdressing salons and personal grooming establishments	£119	4.0%
Recreational and sporting services	£240	8.0%
Restaurants, cafés etc	£1,801	60.0%
Total Leisure per person	£3,001	100.0%

Source: Experian Location Analyst UK Leisure Spend

60. A number of these spend categories are particularly relevant to town centres and average UK spend for these is summarised below:

Table 4: Annual UK Expenditure per Head for Selected Leisure Activities

Expenditure Per Person	Category of Spend	Spend per Annum (£)	% of Total Leisure Spend
Restaurant and café meals	F&B	£859	28.6%
Take away meals eaten at home	F&B	£368	12.3%
Alcoholic drinks (away from home)	F&B	£337	11.2%
Other take-away and snack food	F&B	£219	7.3%
Hairdressing salons and personal grooming establishments	Personal Grooming	£119	4.0%
Lottery	Games of Chance	£110	3.7%
Leisure class fees	Recreational and Sporting Services	£81	2.7%
Participant sports (excluding subscriptions)	Recreational and Sporting Services	£57	1.9%
Live entertainment: theatre, concerts, shows	Cultural Services	£52	1.7%
Museums, zoological gardens, theme parks, houses and gardens	Cultural Services	£28	0.9%
Bookmaker, tote, other betting stakes	Games of Chance	£25	0.8%
Admissions to clubs, dances, discos, bingo	Cultural Services	£23	0.8%
Spectator sports: admission charges	Recreational and Sporting Services	£20	0.7%
Contract catering (food)	F&B	£17	0.6%
Cinemas	Cultural Services	£12	0.4%
Bingo stakes excluding admission	Games of Chance	£12	0.4%
Total Selected Leisure Spend per Person		£2,339	77.9%

Source: Experian Location Analyst UK Leisure Spend

61. This shows the significance of spend on Food & Beverage (F&B) activities, which accounts for around 60% of total leisure spend, albeit this expenditure will be split between a large number of locations and types of establishments.

62. Within this category meals out generates the highest overall spend accounting for 28.6% of all leisure spend. A further 11.2% is accounted for by the purchase of alcoholic drinks, some of which will be spent during restaurant visits. Takeaway meals eaten at home or elsewhere together account for a further 19.6% of spend.

63. The next highest spend is on hairdressers and personal grooming (£119 pa, 4.0% of leisure spend), followed by spending on leisure class fees (£81 pa or 2.7% of total expenditure) and participant sports (£57 or 1.9%) excluding lottery.

64. Spending on cultural activities is high at over £400 per annum, but much of this is spent on TV subscriptions or similar within the home. On average 1.7% of leisure spend is on live events such as the theatre, concerts and shows, whilst the average spend on cinema visits is just £12 pa, or 0.4% of overall spend.

65. Spending on Games of chance other than the lottery is also low.

66. Going forward, there is expected to be relatively little growth in spend on leisure activities overall, now that the period of significant fluctuation post-pandemic has settled down. This reflects the discretionary nature of much of the spend and the budget restrictions facing many households (outlined above).

67. The most recent leisure spend projections by Experian are set out in RPBN 22 and show that following a dramatic -36.3% fall in leisure spend per head in 2020 due to the pandemic, there was an upsurge in 2021 of 29.5% that continued into 2022, when spend increased by 20.9%. In 2023 however there was a reduction of -2.9% due to the cost of living crisis and rising inflation. Experian predict a continued reduction in 2024 (-1.6%) followed nil growth in 2025. From 2026 onwards, annual

growth will be minimal at 0.3% in 2026 followed by 0.6% pa to 2031 and then 0.7%pa to 2040.

Table 5: Leisure Spend and Projections (year-on-year growth %)

	2020	2021	2022	2023	2024	2025	2026	2027 -31	2032 -40
Annual Leisure expenditure growth	-36.3%	29.5%	20.9%	-2.9%	-1.6%	0.0%	0.3%	0.6%	0.7%

Source: Retail Planner Briefing Note 22 (March 2025)

68. However, these decreases/increases in available spend are unlikely to be distributed evenly across the leisure sector. When combined with concentrations of spending online and the specific locational requirements of some activities, it is clear that from the perspective of planning for town centres, the focus of commercial leisure activities is likely to be on:

- **Food & Beverage (F&B) Spend** – this is important for many reasons including the scale of expenditure and the importance of this landuse within centres at all levels of the retail hierarchy;
- **Hairdressing and Personal Grooming** – this sector is dominated by independents and is often strongly represented in lower order centres;
- **Cultural Services** – most relevant for the higher order centres; and
- **Leisure Classes**.

69. Spending on **Accommodation Services** is unlikely to be of relevance in terms of resident spend, as this is most likely to be spent outside of the home area. However, it will be relevant for locations with a strong tourism offer or visitor attractions.

70. Spending on **Games of Chance** other than the lottery is relatively small and much of the spend is made online. Therefore, whilst the proliferation of betting shops has been a planning concern in some locations in the past, it is unlikely to be a policy concern, given that such uses are now considered to be *Sui Generis*.

Food & Beverage (F&B)

71. As outlined above, spending on F&B is the highest of all the leisure categories and encompasses a range of different types of spend on food and drink. This spend is usually dispersed across a large range of outlets and locations with a high proportion linked to consumption within the home. A proportion of spend will also be made outside of the resident's home area, being linked to holiday and leisure activities, or at out of centre locations more locally.

72. Notwithstanding this, F&B outlets are an integral part of a town centre's wider offer and economy. Within larger centres a good choice and quality of F&B uses can help to complement other town centre uses, by generating trips, stretching 'dwell times' (i.e. the time people spend in centres), increasing 'linked' expenditure to other shops and businesses as part of the same trip, and strengthening both daytime and evening economies.

73. In lower order centres cafes can support daytime activities and footfall, whilst the evening economy is often linked to hot food takeaways and public houses if present.
74. Going forward the expected growth in leisure spend has the potential to assist the F&B sector, but the degree to which this will benefit town centre businesses and different centres in the retail hierarchy is unclear. The key trends that are driving changes in the sector are identified below.

Restaurants

75. Prior to the pandemic, the increase in popularity in 'eating out' and the growth of many casual dining and family-orientated restaurant chains had led to a confidence that restaurants and the F&B sector generally would be able to take up much of the town centre floorspace being vacated by retail uses. However, over-investment in some casual dining brands and competition in the market meant that stresses were obvious prior to the pandemic.
76. Just as in retail however, the pandemic accelerated these trends as well as presenting new challenges to the sector. The initial closure of businesses and subsequent requirements for social distancing meant business turnovers declined sharply making those with debts particularly vulnerable. The economic challenges since have seen rising business costs including utility costs, wages and NI contributions and difficulties in attracting staff, at the same time as the cost of living crisis has reduced many people's spending.
77. The introduction of home delivery services which assisted many businesses during the pandemic has also accelerated the popularity of 'dining at home' and this continues to present both benefits and challenges for the sector. Restaurants have been able to enter the home delivery market using online third-party delivery companies, such as Just Eat, Deliveroo and Uber Eats, increasing their potential market and appeal. However, balancing the needs of dine-in and delivery customers can be a challenge and 'dining at home' reduces the potential for higher margin sales to customers, whilst retaining many of the fixed business costs.
78. The short-term response for many restaurants, particularly in the independent sector has been to reduce operating hours, with some closing completely on quieter days of the week, allowing them to operate with a smaller number of staff. Others have reduced their menu ranges. However, with inflation increasing the costs of raw ingredients and business costs continuing to rise, challenges remain across the sector.
79. The industry is also seeing increased competition from out of centre locations, with the many chain restaurants seeking representation in out of centre locations including existing retail and leisure parks, where property costs are usually lower and it can be easier to provide delivery or 'click & collect' options. Such locations have also seen an increase in the demand for 'drive thru' restaurants.

Coffee Shops & Cafés

80. Coffee shops have been one of the key success stories on UK high streets over the last two decades and the sector continues to be resilient and innovative.

- 81. With more than 11,450 branded outlets at the beginning of 2025 and annual sales of more than £6.1bn, the UK branded coffee chain segment has achieved over 20 years of outlet growth – only briefly interrupted by the pandemic.
- 82. However, competition in the sector is high and many operators are currently focusing on value-for-money to attract price-conscious consumers amid an increasing range of coffee shop choices. This includes the expanding portfolio of the major brands such as Costa, Greggs and Starbucks, increasing boutique branded chains, a strong independent sector and value-driven non-specialist operators.
- 83. The drive-thru coffee sector is also growing with 51 new sites added in 2024 bringing the total to 855 sites. This includes 373 operated by Costa.
- 84. The non-specialist operators include the likes of McDonalds and major supermarkets which continue to expand their network and the likes of Wetherspoons.
- 85. The return to the office, after the Working from Home (WfH) boom immediately after the pandemic has increased activity for many operators and the overall picture has been one of growth with 199 UK-based chains increasing their store footprint in 2024.
- 86. This reflects positive sales growth in 2024, but there are on-going concerns regarding the impact of high operational costs, and 40 operators saw a decline in store numbers.
- 87. The overall market is expected to continue to grow over the next 3-5 years, increasing the number of branded outlets to 11,800 by January 2026 and to over 13,200 by January 2030, with the most growth likely in the boutique operators and drive-thrus².
- 88. However, some rationalisation of company portfolios can be expected where demand may have fallen as a result of WfH or other changes in footfall.

Public Houses and Bars

- 89. Public houses and bars are a traditional part of the UK F&B sector, with representation in many town, district and local centres as well as an extensive network of free-standing units in both urban and rural areas.
- 90. The number of public houses in the UK has been in decline for decades but recent shocks, such as the pandemic and the energy crisis, have put them under more pressure and closures totalling around 1,350 have been seen in the period since 2020³, reducing the total number of outlets to around 45,000. This compares to 50,800 in 2015 and over 60,000 at the beginning of the millennium.
- 91. Like other operators in the F&B sector, pubs have faced the challenges arising from higher costs (energy, commodity inputs, labour, and interest payments) and

² <https://www.teaandcoffee.net/blog/36125/the-uk-branded-coffee-shop-market-continues-to-rebound/>

³ <https://beerandpub.com/data-statistics>

weaker consumer demand due to the cost of living crisis. However, the diverse nature of the sector results in particular challenges.

92. Overall half of pubs are independent, with around 30% of the remainder owned by pub companies and the remaining 20% by brewers. In total 80% of pubs are SMEs and are either independent or 'leased and tenanted'. These businesses are less likely to have financial reserves to draw on and have been particularly reliant on the support from government. They are also less likely to be able to invest in efficiency saving equipment, making it harder to mitigate the cost increases that have been experienced⁴.
93. As a result, closures in the sector are expected to continue although the potential to increase the food offer and potentially offer additional forms of leisure activities may assist in supporting larger premises in defined centres.

Hot and Cold Food Takeaways

94. As outlined above, the takeaway sector is currently worth over £600 per person per annum and comprises both takeaway meals eaten at home and hot and cold food purchased during the day. Spending is therefore made in the types of outlets outlined above or at specialist sandwich/lunch outlets and hot food takeaways.
95. The importance of these types of outlets varies between centres, with daytime purchases often linked to work locations or transport hubs, whilst hot food outlets tend to be located closer to residential areas or centres with a strong evening/night-time economy.
96. The premises occupied are generally smaller than for other types of F&B offer and will include a high proportion of independent businesses. As such changes within the sector are common, with success likely to be linked to the popularity of offer and business acumen of the owner.

Hairdressing and Personal Grooming

97. With increasing retail sales online, the retail service sector and specifically services linked to hairdressing and personal grooming have the potential to become increasingly important for town centres and high streets, given the physical presence they require.
98. Independent businesses serving local communities have been regular features of smaller centres serving local needs for decades, with specialist/larger chains more likely to be found in larger centres. However, as disposable incomes increase the demand for personal grooming services is growing as evidenced by the increasing numbers of barbers and nail bars trading alongside or within hairdressers and tanning salons.
99. These services will therefore be important draws for our town centres and high streets in the future but, independent traders, are most likely to be interested in occupying small amounts of floorspace in existing premises. Future requirements are therefore most likely to be met through the reoccupation of existing space with

⁴ Impact of recent economic trends on pubs and breweries A report produced for the BBPA (Frontier Economics, October 2023)

the benefits of high footfall having to be offset against higher business costs. Such uses are therefore likely to be attracted to smaller secondary premises or slightly off-pitch locations rather than prime retail space.

Cultural Services

100. Cultural services such as theatres and cinemas are a major contributor to the evening and night time economy, particularly in broadening the appeal to a wider demographic and increasing the draw of a particular centre. In turn this can also support the F&B sector. However spend is rarely restricted to a local area, with higher spend most likely to be associated with visits to regional or sub-regional centres or, in the case of live music, to specific specialist venues.
101. This means that centres providing such higher order facilities are likely to benefit from a more extensive draw and wider catchment than would be expected based on retail provision alone. However, making changes to local provision will rarely be within the remit of planning, instead being linked to maintaining or improving existing facilities through commercial or arts funding sources.

Theatres

102. Although the provision of new theatre space is a relatively rare occurrence, existing theatre provision is generally an important visitor attraction and a key aspect of the evening/night-time economy in a local area.
103. In 2024, members of the Society of London Theatre and UK Theatre welcomed over 37 million audience members, with the West End surpassing 17.1 million attendees, and generating more than £1 billion in revenue for the first time in history.
104. Across the UK, regional theatres reported a 4% increase in occupancy since 2019 - evidence not just of recovery, but of renewed and sustained growth despite a fall in the number of total performances of 8%. This points to a leaner and more efficient operating model⁵.
105. Data also highlights the seasonality of UK theatre, with weekly attendance and performance numbers peaking in December reflecting the importance of festive programming to the annual cycle.
106. There is also evidence of increasing numbers of theatre visitors, including those in younger age groups. According to YouGov surveys, the proportion of respondents visiting the theatre in the preceding three months increased from 22% in July 2019 to 24% in June 2025. However, in the same period the proportion of respondents in the 25-49 age group increased from 20% to 25%. Attendance by 18-24 year olds is also showing positive improvements.
107. Despite this the theatre sector is facing mounting challenges as operating and building maintenance costs increase but the ability of patrons to pay higher ticket prices reduces.

⁵ <https://uktheatre.org/wp-content/uploads/sites/2/2025/05/SOLTUKT-State-Of-British-Theatre.pdf>

Music Venues

108. Music venues provide a wide range of facilities and experiences for visitors and range considerably in size, from a room within a different form of venue to large purpose-built concert halls or the occasional use of a large sporting or other venue. However, whilst the biggest artists and venues are attracting sellout crowds and profitable events, the grassroots music venue (GMV) circuit is continuing to face many challenges, despite their integral role within the live music sector.
109. GMVs are also important for local communities. In 2022 they hosted approximately 21.9 million audience visits across 176,000 events with over 1.6 million individual performers. They are a key fixture of high streets and town centres and support both the night-time and wider economy. They also provide the starting point for many artists, technicians and other industry professionals⁶.
110. Despite this the sector ha been in decline for many years. Since 2005 70% of Britain's late-night venues have closed and in 2023 125 GMVs closed representing a 13% decline⁷. In 2024 a further 25 closures occurred while around 40% of the remaining venues operated at a loss⁸.
111. This is due to the some of the same issues facing retail and other small businesses, relating to rising energy, staffing and business rate costs. However, the sector is also facing competition from changing consumer behaviour with money instead being spent on the occasional 'big venue' or festival event. Businesses also have the added challenge relating to licencing, sometimes due to an increase in the residential population in a centre. Artists costs are also increasing, reducing the numbers able to tour and overseas acts can face visa and work permits problems.
112. As pressure for more housing in town centres also increases, the venues themselves can face closure as a result of redevelopment plans, given many operate in secondary locations or within a multi-use building. The future of live music therefore depends in part on the planning system and an appreciation of the need for suitable and often flexible accommodation,

Cinemas

113. Like the retail sector, the UK cinema sector is also seeing considerable change, both in terms of consumer expectations and the physical offer.
114. In the late twentieth century many of the national multiple cinema operators such as Odeon and Cineworld sought to replace their aging town centre properties with new, multi-screen developments often in out or edge of centre locations. These allowed a greater variety of films to be shown, increasing the potential audience, whilst staffing and operating costs were lower. In many cases such developments also allowed the co-location of a varied F&B offer, adding to the overall attraction of the location from a customer point of view and increasing footfall.
115. However, the increase in streaming services has been an increasing challenge for the sector for a number of years and the Covid-19 pandemic led to significant and

⁶ House of Commons Grassroots music venues – Report of Session 2023-24

⁷ <https://www.economicsobservatory.com/live-music-in-the-uk-whats-the-state-of-the-industry>

⁸ <https://www.artspersonal.co.uk/news/four-in-10-grassroots-music-venues-operating-at-a-loss>

rapid changes to customer behaviour. Unable to visit the cinema during lockdown and facing restrictions on the household budget in the period since, subscriptions to streaming services have increased dramatically since 2019.

116. The availability of streaming services has also changed audience expectations. An increasing number of major releases are funded by these services and are now routinely released online first, with just a short cinema release.
117. The result is that many of the major cinema operators are facing financial pressures and are having to work hard to attract customers. However, there continues to be a demand for cinemas and those providing a more personalised or luxurious customer experience, such as Everyman and Curzon and other boutique operators have sought to capitalise on this, being able to operate from smaller properties, often repurposed from a different use. Easier access to films for community groups also means occasional screening are being carried out in a wide range of venues, often in smaller centres and settlements.

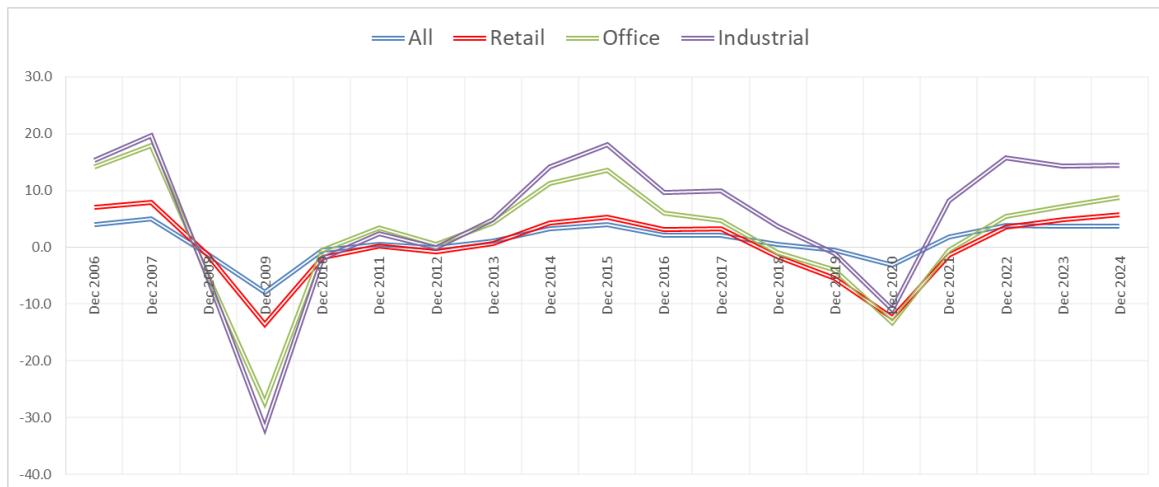
Leisure Classes / Health and Fitness

118. The end of the twentieth century saw increasing leisure time and disposable incomes and with it, with the development of a number of private sector gyms and health club chains. These have developed extensive property portfolios over the last 20+ years and, whilst the State of the UK Fitness Industry Report 2024 indicates that the number of gyms has not recovered to the pre-pandemic levels achieved in 2019, numbers have increased since 2023 and member numbers were up by 4.1% in 2024 from 2023. Even more encouraging for the sector is that the number of gym memberships indicate that 15.9% of the UK's population have a gym membership which is higher than for 2019 (15.6%).
119. The increases in member numbers were greater in the private sector than in the public sector, with budget chains, PureGym and The Gym Group, the two leading operators in terms of new gym openings. There is also increasing demand for niche fitness and well-being related facilities, which are particularly popular with younger generations (Gen Z and Millennials). This includes themed fitness venues such as F45, Crossfit, and yoga studio chains such as HotPod. The increasing emphasis on wellbeing, good health and preventative healthcare remain a positive sign of the sector's longer term resilience.

6. THE PROPERTY MARKET

120. The changes in the retail and leisure sectors has had a knock-on effect on the property market, both within town centres and in out of centre locations.
121. Retail demand across UK centres has plummeted to historic lows dragging down rents, property values and investor confidence. Since the 2007/8 financial crisis the retail sector has consistently underperformed compared to other property sectors and this has been further exacerbated more recently by the pandemic and cost of living crisis, as shown below.

Figure 4: Property: Average Rental Growth (2006-2024) (%)



Source: MSCI UK Quarterly Property Index (April 2025)

122. Retailers are leveraging this downturn to secure more favourable lease terms, including turnover based rents, capped service charges, shorter leases, pandemic clauses and generous incentives. However, with a relatively limited number of potential occupiers, many UK retail centres suffer from an oversupply of outdated or the 'wrong type' of spaces unable to meet modern retailer demands for larger flexible units.
123. LSH's research together with REVO titled '**Shaping Tomorrow's Places**' (June 2025) provides a barometer of the main issues and challenges facing our centres, and the opportunities and potential interventions available (and/or needed) to support their future recovery, reinvention and renaissance.
124. This research indicated that business rates have consistently been identified as one of the main challenges impacting on the viability of our centres alongside an oversupply of retail space and the growth of online retail spend.

Vacancy Rates

125. At the end of 2024, the GB national average 'All Vacancy Rate' (retail and leisure combined) stood at 13.8% (a decrease from 14% in 2023). The current rate is still higher than the pre-pandemic (Q4 2019) level of 12.1%, so the sector has yet to fully recover.
126. Over the past five years, retail parks and shopping centres have shown an overall decline in vacancy rates, while high streets have experienced an increase. From a

vacancy high of 19.4% in the second quarter of 2021, shopping centres dropped to 17.2% by the final quarter of 2024.

127. The LSH/Revo survey has consistently identified there is too much retail floorspace in the UK. As a result, centres and locations are competing to attract limited occupier interest.
128. This over-supply of retail floorspace and limited market demand is also placing pressures on the viability of existing stores and shopping centres. In turn, this makes it difficult for landlords, investors and retailers to justify additional capital expenditure. There is also competition to secure public and private sector investment to help deliver critical redevelopment and regeneration projects.

Out-Of-Centre Retailing

129. The development and take-up of retail and leisure out-of-centre space has also slowed over recent years, in line with the trends impacting on high streets and town centres. The main grocery retailers have pulled back from new larger format superstore openings in edge and out of centre locations to focus on maintaining and increasing market shares through online sales and opening smaller convenience outlets, often in smaller centres. The exception to this is the discounters, Aldi and Lidl, who continue to seek new sites in mainly edge and out-of-centre locations.
130. Vacancy levels in out-of-centre retail warehouses and parks have also increased over the last decade following the closure of major operators, such as Carpetright, Toys R Us, and a reduction in the store portfolios of other major out-of-centre retailers, including B&Q and Homebase. There are likely to be further increases in closures, particularly in the poorly performing "first generation" and secondary shopping locations, as leases come up for renewal and more retailers go into administration. As a result, a number of out-of-centre foodstore and retail warehouse sites are being repurposed and/or redeveloped for alternative uses, including leisure, logistics and residential uses.
131. Notwithstanding this, most out-of-centre shopping locations retain their significant competitive advantages over town centres and high streets in terms of their supply of larger format modern outlets, ease of access, their lower occupancy costs and extensive free parking as well as their ability to serve as last-mile delivery hubs. This remains an attractive proposition for those retailers that are still seeking space in the current market. For example, as part of its revised business model Marks & Spencer has closed a number of its traditional high street stores and "replaced" these with 'Simply Food/Food Hall' branded stores in out-of-centre locations.
132. According to the investment property forum (May 2025), modest rental growth is expected in 2025; 1.5% for shopping centres, 2.3% for retail warehouses and 2.5% for standard retail indicating cautious optimism in a still-rebalancing market.

Retail Productivity

133. For those 'Bricks and mortar' retailers that continue to trade, occupancy costs such as rents, rates, utilities and wages are rising faster than inflation and outpace

sales growth. This squeezes margins and accelerates store closures. The competitive imbalance between bricks and mortar stores and online or out of centre retailers makes survival even tougher. To stay viable, retailers must therefore maximise efficiency and productivity from existing space.

134. It is standard practice to make allowance for such changes in retail planning assessments and the latest RPBN 22 provides forecasts of annual floorspace productivity growth rates based on two different scenarios: (i) the 'constant floorspace scenario', based on limited potential for new retail development, resulting in greater efficiency of existing floorspace; and (ii) the 'changing floorspace scenario', which takes account of the impact of new retail development on average retailer sales performance. The table below sets out the differences between the two scenarios.

Table 6: Floorspace Productivity Growth Rates (year-on-year growth %)

	2023	2024	2025	2026	2027-2031	2032-2040
CONSTANT FLOORSPACE						
Convenience Goods	-2.4%	-2.3%	0.0%	0.1%	0.1%	0.1%
Comparison Goods	-0.5%	-0.1%	0.5%	1.7%	2.5%	2.5%
CHANGING FLOORSPACE						
Convenience Goods	-2.4%	-2.3%	-0.1%	0.0%	0.0%	-0.1%
Comparison Goods	-0.5%	-0.2%	0.4%	1.6%	2.3%	2.3%

Source: Experian Retail Planner Briefing Note 22 (March 2025); Figures 3a/3b and 4a/4b

135. As Experian explains, sales density growth rates have been volatile in recent years given sharp swings in retail spending due to temporary closures in businesses during the pandemic, and subsequently the impact of high inflation. There is anticipated growth in sales densities in 2025 as retail sales volumes rebound, driven by the comparison component and aided by mildly improving consumer affordability. However over the medium and longer term, budgetary challenges from rising costs and tight margins will be a key factor underpinning floorspace efficiencies over the coming years. These results reflect national trends and there will be marked differences between local areas.

136. On this basis, budgetary pressures mean that retailers will have to increase efficiencies from current floorspace including through redevelopment/repurposing of existing floorspace; adoption of modern technology and innovations; more effective marketing strategies; and adopting an 'omni-channel' strategy (refers to the integration of different methods of shopping available to consumers e.g. via the internet, in a physical shop, or by phone) that uses internet sales to increase the sales performance of physical shops. This is against a backdrop of weak demand for retail property, high vacancy levels and a significant fall in new retail-led development in centres across the UK.

137. For these reasons we prefer to test higher '**constant floorspace productivity**' growth rates for retail planning assessments, as they better reflect national trends and the need for existing retailers to increase their sales potential and profit margins to remain viable.

7. THE FUTURE FOR OUR TOWN CENTRES AND HIGH STREETS

139. Town centres and our traditional high streets have always been dynamic, adapting and evolving to meet the emerging needs of their customer base but the significant and fast-moving structural changes seen during the last 10-15 years have made it difficult for centres to adapt quickly enough, resulting in increased vacancies and under-utilised retail space.
140. Our towns, traditional high streets and shopping centres have been challenged for more than a decade by falling market demand, rising occupancy costs and increasing competition from online and out-of-centre shopping. These trends have been further accelerated and compounded by the COVID-19 pandemic and have resulted in an increase in vacant shop units, often in primary shopping areas, as retailers and occupiers either choose to downsize and/or close stores in some locations (e.g., Marks & Spencer, John Lewis), or they are forced out of business altogether due to failing business models and unmanageable debts (e.g., the Arcadia Group).
141. The commercial leisure industry is also facing considerable challenges and pressures.
142. Going forward, small increases in expenditure per head for both retail and leisure activities are expected, but much of this will be offset by higher levels of online sales and the improved productivity required by existing businesses if they are to remain profitable and viable. As a result the over-provision of retail floorspace is likely to persist both in town centres and out-of-centre locations, with a corresponding impact on rental levels.
143. The critical challenge over the short, medium and long term will be how to retain existing businesses, fill/replace the voids and attract new investment. The danger is that an increase in long-term vacancies in centres will lead to a 'spiral of decline', which will further engender feelings of neglect and lack of investment confidence in town centres, and "push" more people to shop online.
144. The repurposing of existing retail space and increased diversity of uses will therefore be key to ensuring that town centres at all levels of the retail hierarchy are able to continue to evolve to meet the changing needs of their catchment.
145. As town centres evolve, residential provision in centres is already being encouraged, including by previous national planning changes (such as office to residential conversions through prior approval, and permitted development for two flats above a shop).
146. In those cases where retail vacancies are long-term and more often than not concentrated in secondary shopping streets/pitches, it will be necessary to plan for alternative uses and/or consider options for redevelopment. As a result of the increasing drive towards more flexible planning through changes to the Use Classes Order and Permitted Development Rights, there will inevitably be more mixed-uses within centres.
147. It will also be important to maximise intergenerational residential provision in the most sustainable locations, particularly in centres, as part of a balanced mix of

uses. The LSH / REVO research mentioned previously also indicated that providing mixed tenure homes in and on the edge of centres is recognised as key to delivering more viable and resilient town centres. Consideration also needs to be given to enabling the growth of other uses, such as education, leisure and recreation within centres, which, along with residential, are particularly positive in terms of enhancing the vitality of centres.

148. The extent to which change is needed and the urgency for action will vary depending on the individual location and the role and function of the centre. Some areas are seeing a decline in footfall and retail demand as a result of increasing online sales, more Working from Home or the national trends, but others are continuing to maintain their retail draw. This includes locations where the offer is attractive to local residents, as WfH and more online shopping for larger items increases the potential for local purchases of day-to-day items. Centres with a strong tourist draw or providing a unique offer and/or attractive environment are also more likely to perform well.

Isle of Anglesey Retail Study

Appendix B – Shopping & Leisure Patterns and Retail Capacity Assessment

Prepared for:

Isle of Anglesey County Council

December 2025

ish.co.uk

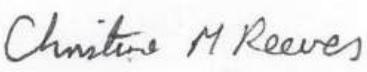


This document has been prepared and checked in accordance with the Lambert Smith Hampton Quality Assurance procedures and authorised for release. If not signed off by a Director in the Planning, Regeneration + Infrastructure (PR+I) division at LSH then this document should be treated as a draft, and as being Private and Confidential. It should not be for wider distribution without the sign-off and permission of Lambert Smith Hampton.

This report meets the PDF/UA (Universal Accessibility) standard, which is equivalent to the WCAG 'AA' digital standard.

Prepared by:

Christine Reeves

Signed: 

For and on behalf of Lambert Smith Hampton

Issued: December 2025

Contents

1. INTRODUCTION.....	4
2. THE STUDY AREA AND DATA SOURCES.....	5
3. RETAIL AND LEISURE SPENDING PATTERNS	9
4. RETAIL CAPACITY ASSESSMENTS	12

1. INTRODUCTION

1. This Appendix report provides information on existing retail and leisure activity in the study area and sets out the methodology and results of the economic capacity ("need") assessments for new retail (convenience and comparison goods) floorspace.
2. The report is structured as follows:
 - **Section 2** provides details of the study area and the expenditure data source;
 - **Section 3** looks at retail and leisure spending patterns in the study area; and
 - **Section 4** provides the retail capacity assessment for convenience and comparison floorspace.

2. THE STUDY AREA AND DATA SOURCES

Experian Insights Data

3. To provide the necessary information on expenditure patterns in the adopted Study Area, data has been obtained from Experian Insights as an alternative to undertaking a household survey of a sample of local residents.
4. Experian Insights uses actual transaction data from 4 million customers across the UK. This information can be used to identify how much money is spent in specified locations and the origin of that spend (i.e. customer home location), using different levels of geography and against typical retail and leisure categories. This allows a detailed understanding of actual customer behaviour.
5. For this study, the data has been provided for the following areas and spend categories.

Study Area

6. The study area is focused on the Isle of Anglesey and divided into two zones namely:
 - Zone 1- Island of Holyhead
 - Zone 2 – Rest of Anglesey
7. To better understand expenditure inflows and outflows from the Council area, we have also defined two areas covering the adjoining populations and a 'Rest of UK' zone:
 - Zone 3 comprises the area of Gwynedd County Borough
 - Zone 4 covers the area of Conwy County Borough and
 - Zone 5 (Outside the Study area) comprises the Rest of the UK.
8. A map showing the study area is provided at Appendix B1 to this report.

Spend Locations

9. Within each zone the key town centres and out of centre retail and leisure destinations have been identified, with the rest of the spending in a zone grouped as appropriate.
10. The table below sets out the settlements, including town centres, local centres and other locations identified in the Experian Insights Analysis.

Table 1: Identified Retail & Leisure Spend Locations in Isle of Anglesey

Merchant location	Retail Location
Zone 1 - Holyhead	Holyhead Town Centre Holyhead Retail Park Penrhos Retail Park Elsewhere in Holyhead Town Trearddur Bay Zone 1 - Elsewhere in Holyhead
Zone 2 - Rest of Anglesey	Llangefni Town Centre Elsewhere in Llangefni Amlwch Local Centre Elsewhere in Amlwch Beaumaris Local Centre Elsewhere in Beaumaris Benllech Local Centre Elsewhere in Benllech Llanfairpwll Local Centre Elsewhere in Llanfairpwll Menai Bridge Local Centre Elsewhere in Menai Bridge Valley Local Centre Elsewhere in Valley Cemaes Local Centre Elsewhere in Cemaes Gaerwen Local Centre Rhosneigr Local Centre Elsewhere in Rhosneigr Zone 2 - Elsewhere In Anglesey

11. In addition, spend from Anglesey leaking to other areas identifies the following specific locations:

- Bangor Town Centre
- Elsewhere in Bangor
- Elsewhere in Gwynedd
- Anywhere in Conwy County
- Elsewhere in Wales
- Chester City Centre
- Cheshire Oaks
- Elsewhere in Chester
- Liverpool City Centre
- Elsewhere in Liverpool
- Elsewhere in UK

Expenditure Categories

12. Given the purpose of this study is to determine the capacity / need for additional retail floorspace and other town centre uses/ facilities and to examine commercial

leisure trends, the expenditure data provided by Experian Insights relates to the following expenditure categories:

Table 2: Experian Insights Retail and Leisure Food & Beverage Categories

Category Name	Sub Sector Name
Supermarket (Convenience)	Alcoholic Beverages Confectionary Convenience Corner Shops and Newsagents Health and Nutrition Non-Alcoholic Beverages Specialist Grocery Supermarkets
Comparison Retail	Baby and Childrenswear Bags and Accessories Beauty Products Books and Stationery Cards and Gifts Department Stores Discount Retailers DIY and Interior Design Electronics and Appliances Florists Furniture Garden Healthcare Providers High Street Household Products Jewellery and Watches Lingerie Luxury Fashion Menswear Other - General Retail Pets Shoes Sports Equipment & Clubs Sportswear Toys and Gaming Unisex Womenswear
Leisure Food & Drink	Cafes and Coffee Shops Fast Food Chains Food Delivery Services Mid-Tier Restaurants Pubs and Bars Restaurants
Entertainment Leisure	Attractions and Experiences Entertainment - Other Live Shows and Events

13. Experian Insights transaction data is provided for a 12-month period ending 31st December 2024. As such, the data provides a good baseline for understanding how residents and visitors spend money on retail goods and leisure activities, taking account of variances that typically occur over a given year (e.g. seasonal activity).
14. The base data is provided in Appendix B2 as follows:
 - Table B2.1 Supermarket (Convenience) Spend
 - Table B2.2 Non-Food (Comparison) Spend
 - Table B2.3 Leisure Food & Drink Spend
 - Table B2.4 Leisure Entertainment Spend

3. RETAIL AND LEISURE SPENDING PATTERNS

15. To inform our understanding of spending patterns in the area the Experian data has been used to calculate the market shares for the centres and zones, providing information both on where residents in a zone spend their money and how reliant a particular centre is on local or visitor trade. The information is presented in Appendix B3 and discussed below in more detail.

Convenience Retail Spending

16. Spending on convenience goods is usually undertaken on a fairly localised basis with 'convenience to home' being a key determinant in the choice of shopping destination.

17. The spending patterns in Anglesey are set out in Tables B3.1 and B3.2, with Table B3.1 showing where spend in a zone is directed and Table B3.2 showing how spend from different areas contributes to the overall turnover of a location.

18. This shows that most convenience expenditure is retained within Anglesey, with 82.2% of Zone 1 spend and 58.2% of Zone 2 spend going to stores and centres on the Island. As would be expected, retention is higher in Zone 1 (Holyhead), whilst Zone 2 (rest of Anglesey) sees 20.5% of spend going to Gwynedd, mainly to the out-of-centre stores in Bangor (18.4%).

19. Within Anglesey the destinations attracting the most convenience spend are the out of centre stores in Llangefni (13.4% - Aldi, Asda and Lidl) and the Penrhos Retail Park in Holyhead (13.1%). The latter includes Tesco Extra and Aldi. The neighbouring Holyhead Retail Park (Morrisons) attracts 5.2% of spend, whilst the Asda in Holyhead would attract much of the 3.1% of trade going to locations 'Elsewhere in Holyhead Town'.

20. Very little convenience spend is made within the defined centres.

21. The use of online shopping is lower across the Study Area than in the UK as a whole where 17.0% of spending is forecast to be spent online or via other types of Special Forms of Trading (SFT). In Zone 1 only 8.8% of spend is online, whilst in Zone 2 it is 14.4%.

22. In terms of where centres and convenience stores draw their trade (Table B3.2) the importance of visitor spend is very clear for some locations including:

- Trearddur Bay (78% of spend from visitors from the Rest of the UK);
- Elsewhere in Holyhead (52% from visitors), with a further 3.5% from residents in Gwynedd;
- Beaumaris Local Centre (49% from visitors and 5% from Gwynedd and Conwy residents);
- Elsewhere in Beaumaris (32% from visitors and 5% from Gwynedd and Conwy residents);
- Elsewhere in Benllech (40% from visitors);
- Llanfairpwll Local Centre (16% from visitors and 11% from Gwynedd residents);

- Menai Bridge Local Centre (21% from visitors and 10% from Gwynedd residents);
- Elsewhere in Menai Bridge (21% from visitors, 15% from Gwynedd residents and 4% from Conwy residents);
- Valley Local Centre (27% from visitors);
- Cemaes Local Centre (37% from visitors);
- Elsewhere in Cemaes (62% from visitors);
- Rhosneigr Local Centre (70% from visitors); and
- Elsewhere in Rhosneigr (54% from visitors).

23. In contrast the convenience stores in Llangefni, Amlwch and Gaerwen primarily serve their local communities.

Comparison Retail Spending

24. The destinations for spending on non-food items tend to be more varied than for convenience purchases, reflecting the greater range of the types of goods that may be purchased, the frequency of purchase and their value. The information for Anglesey, presented in Table B3.3, shows the importance of on-line sales, with an average 43.2% of all comparison spend going online across Zones 1 and 2. This compares with a UK average of around 31.6%.

25. The remaining spend is distributed across a wide range of centres and locations, but only 19% of spend generated on the Isle of Anglesey is spent locally. Around 15% of spend goes to outlets in Gwynedd, mainly the out-of-centre retail units in Bangor and a further 5% to locations in Conwy. There is also leakage of 10.6% to a range of locations further afield.

26. Table B3.4 also shows the reliance of some comparison locations on visitor spend, in a similar way to visitor spend on convenience goods. Of particular note:

- Other than Holyhead Town Centre, all locations on Holyhead draw more than half of their trade from areas beyond Holyhead (Zone 1). This includes trade inflow from the Rest of Anglesey (Zone 2) and visitors;
- Visitors account for around 43% of comparison spend in Treaddur Bay and around 15% of spend in Holyhead;
- Comparison retailers in Beaumaris get between 62% and 68% of spend from visitors;
- In Rhosneigr visitor spend accounts for 71% - 81% of comparison spend;
- Comparison retailers in Cemaes and Llanfairpwll local centres get around 40% of trade from visitors, while Benllech gets around 31%;
- Retailers in Menai Bridge attract trade from Gwynedd residents as well as visitors; and
- Locations in Llanfairpwll but outside the centre are popular with Gwynedd residents.

27. Only Amlwch, Valley and Gaerwen local centres and out-of-centre locations in Llangefni rely primarily on locally generated comparison trade.

Leisure Food & Drink Spend

28. Spending on food and drink encompasses a range of activities from purchasing takeaways for consumption in the home to dining out. As a result any individual is likely to spend money in a large number of outlets, including some when on holiday or away from home. This is reflected in the Anglesey data (Table B3.5) which shows around 17% of all Anglesey spend being made in more distant parts of the UK, in addition to around 11% spent online.
29. The nature of the spend also means that much of the spend is likely to be made outside of defined centres, as possible destinations include pubs, many of which are free-standing. Destinations will also include cafes and takeaways in small parades of shops and cafes and restaurants linked to transport termini etc.
30. Again this is reflected in the Anglesey data with 'Elsewhere' locations in the zones attracting relatively high proportions of spend.
31. The data also confirms that spending locally is important with 42% of Zone 1 expenditure spent in the Zone and 36% of Zone 2 spend. However, spend on visits to Gwynedd and Conwy are also important attracting 19% of Anglesey trade overall.
32. Table B3.6 again shows the importance of visitor trade with many locations attracting more spend from visitors than from local residents including Trearddur Bay, Beaumaris, Benllech, Cemaes and Rhosneigr. Menai Bridge and Llanfairpwll also attract significant spend from Gwynedd.

Leisure Entertainment

33. The Experian data on entertainment spend is of more limited assistance in understanding the use of leisure facilities within Anglesey, as nearly two-thirds of recorded spend is now made online (63.7% across Zones 1 and 2), reflecting the way most cinema, theatre and live music tickets are now sold (Table B3.7).
34. Key findings from the data however include:
 - Locations in Holyhead but outside the defined centre attract 17.7% of local (Zone 1) spend, compared with just 2.9% within the centre;
 - Llangefni town centre attracts 11% of Zone 2 spend; and
 - There is leakage of over 18% of Zones 1 and 2 spend going outside of the County Borough, although a proportion of this is likely to be linked to spending on vacation.
35. As with the other types of spend, spending by visitors is often of greater importance for Anglesey locations, especially in Trearddur Bay, Beaumaris, Llangefni, Menai Bridge and Rhosneigr.

4. RETAIL CAPACITY ASSESSMENTS

36. Having used the Experian Insights transaction data to inform our understanding of shopping spending across the Study Area, the next stage is to undertake the economic retail capacity ('need') assessment for new retail (convenience and comparison goods) floorspace in the Isle of Anglesey County Borough.
37. The capacity forecasts take account of the lifetime of the plan starting from 2024 (base year) up to 2039, although findings beyond 2035 should be treated with caution on the basis that forecasts become less reliable after a 10-year period.
38. The detailed economic capacity tabulations for convenience and comparison floorspace are set out in Appendices B5 and B6 respectively, with the base population and expenditure figures provided in Appendix B4.

The CREAT^e Model

39. The assessment utilises the CREAT^e economic model which has been specifically designed, developed and tested by the LSH team over more than 25 years to assess the capacity for and impact of new retail (convenience and comparison goods) floorspace development. The evidence-based model has helped to inform and guide plan-making and decision-taking at the local, sub-regional and regional level throughout this period. In brief, the CREAT^e (Excel-based) model adopts a transparent 'step-by-step' approach in which all the key assumptions and forecasts can be easily tested.
40. The Experian Insights data provides the basis for the retail capacity assessment which uses the CREAT^e model to forecast capacity for convenience and comparison goods.
41. At the outset it has been assumed for the purpose of the capacity assessment that the local retail market in Anglesey is in 'equilibrium' at the base year. In other words, all existing centres/stores are broadly assumed to be trading in line with expected average ('benchmark') turnover levels. This is a reasonable approach as it reflects the impact of the economic downturn and the significant growth in online sales on the trading levels and performance of retailers and stores across the UK. As a result any latent demand could normally be expected to have been met by the occupation of available vacant floorspace.
42. In simple terms, this means that any residual expenditure available to support new retail floorspace over the forecast period will be generated by the difference between the forecast growth in 'current' (study-derived) expenditure levels and the growth in 'benchmark' turnovers of existing floorspace, based on applying robust year-on-year 'productivity' ('turnover efficiency') growth rates to all existing and new retail floorspace.
43. It is important to restate that medium to long term forecasts should be treated with caution, as they will be influenced by the dynamic changes in economic, demographic and market trends.

44. The updated capacity forecasts set out in this section provide the Council with a broad indication of the (quantitative) need for new retail (comparison and convenience goods) floorspace in Anglesey.
45. The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the CREAT^e Model are described below.

Base Year Population And Projections

46. The population estimates and projections for Anglesey over the study period (to 2039) are based on the most recent information available from Experian Location Analyst. These provide a base year estimate for 2023, and these are projected forward by Experian using ONS data.
47. The resulting population levels for the Study Zones are set out in Table B4.1 and show that the total Study Area population is forecast to decrease by around 333 persons (-0.5%) between 2024 and 2034 and by a similar amount (340 or -0.5%) over the whole study period from 2024 to 2039.

Expenditure Per Capita Levels And Forecasts

48. The baseline expenditure per capita ('per person') figures and forecasts are presented in Table B4.2 for convenience goods and Table B4.5 for comparison goods. The baseline average expenditure per capita figures derived from our in-house Experian Location Analyst GIS are 2023 based and all expenditure and turnover figures are expressed in 2023 prices.
49. The growth in the expenditure per capita figures by zone is informed by the forecasts published in the latest Experian Retail Planner Briefing Note 22 (RPBN22), released in March 2025. Experian is currently forecasting more limited year-on-year growth in retail expenditure than in previous years reflecting the impact of long-term economic and market trends, which have been further accelerated by the impact of the pandemic.
50. This is particularly the case for convenience spend, where spend per head is expected to decline during the Plan period.

Special Forms Of Trading and other Adjustments

51. Special Forms of Trading (SFT) is deducted from the forecast retail (convenience and comparison) expenditure levels over the forecast period to reflect that proportion of retail spend that is not available to physical shops.
52. The base rate for 2024 is informed by the proportions of spend recorded by the Experian Insights data which relates to that year. This has then been adjusted to reflect the fact that a proportion of online convenience and comparison retail sales are sourced from traditional ('physical') stores rather than from dedicated ('dot com') warehouses. Experian assume 25% of SFT's market share for comparison goods and 70% for convenience goods are sales sourced from "physical" stores.
53. The expected annual growth in online sales/SFT is then applied to the forecast expenditure per head for future years, in line with the RPBN22 figures.

54. The available spend per head has also been adjusted to reflect that not all convenience spend is spent in foodstores and not all comparison purchases are made in non-food stores.

Available Expenditure

55. The resulting expenditure per head is then presented in Tables B4.3 (convenience) and B4.6 (comparison), with the total available expenditure figures presented in Tables B4.4 and B4.7 respectively. These show that over the study period available convenience spend will decrease by between 4.8% (2024 – 2034) and 6.1% (2024 – 2039). Comparison expenditure is expected to increase by 14.2% between 2024 and 2034 and (indicatively) by around 25% between 2024 and 2039.

56. The difference in expenditure growth between convenience and comparison goods should be viewed in the context of the fluctuating levels of spend over the past 5 years. For example, comparison retail spend dipped significantly in the first year of the Covid pandemic before recovering in 2021 as restrictions eased. However, this was followed by a three-year decline in spend to 2024 as consumers held back on spending due to the cost-of-living crisis. Growth in comparison sales is only expected to occur from 2025 (+0.1%) before stabilising at 2.5% per annum from 2027 and at 2.6% per annum from 2032.

57. By contrast spending on convenience goods is generally more static. The uplift as a result of the pandemic was noticeable in 2020 at +6.8% when eating out was curtailed, but spending has since declined year on year. This trend is expected to continue to 2040, although the rate of decline has reduced significantly to around -0.2% to -0.3% per annum from 2027 onwards.

Market Shares and Centre Turnover Analysis

58. The next stage in the capacity assessment involves allocating the available spend to the transaction-based market shares identified from the Experian Insights data. From this we can identify the expected turnover of centres in the Study Area and the monetary value of Study Area and zonal expenditure diverted to competing centres.

59. The market share information for convenience and comparison spend is set out in Tables B3.1 and B3.2 (Appendix B3) using Zones 1 and 2 which together cover the Isle of Anglesey County Borough. The inflow of trade from the mainland has also been calculated from the Experian Insights data.

60. For the retail capacity assessment, and in line with accepted approaches, the market shares have then been adjusted for both convenience and comparison goods to exclude SFT. The adjusted market shares are set out in Table B5.1 convenience (Appendix B5) and Table B6.1 for comparison (Appendix B6).

61. Forecast turnover for retail centres and destinations in 2024 – 2039 is then provided in Tables B5.2 – B5.5 for convenience and Tables B6.2 – B6.5 for comparison, with the results summarised in Tables B5.6 and B6.6 respectively.

62. These forecast turnovers are based on constant market shares, i.e. assuming no change in where people currently shop. This 'constant market share approach' is

standard practice for strategic retail capacity assessments but does not take account of the potential impact that new retail investment and development (both within and outside the study area) or variances in visitor numbers may have on market shares and turnover performance over time.

Retail Capacity Assessment

63. The final stage is to assess the retail capacity in the area going forward looking at how much of the increased expenditure (if present) is likely to be available to support new floorspace.

Floorspace Productivity

64. A key input to this is the application of a year-on-year floorspace '*productivity*' growth rate to all existing and new retail floorspace. This represents the expected increase in store turnover over and above inflation that existing retailers are expected to achieve. This is required to cover their increasing costs (including, for example, rising rents, business rates and wages). Achieving these higher annual '*productivity*' growth rates is essential if businesses are to remain profitable and viable over the short, medium and long term. This is particularly the case as the competition from online retailing increases, a trend that has been significantly accelerated by the impact of the pandemic.

65. Experian provides forecasts for productivity growth rates in the form of expected changes to retail sales densities (RPBN22, Figures 3 and 4), with two scenarios tested, assuming (i) constant floorspace and (ii) changing floorspace. For the purposes of assessing capacity we have used the 'constant' floorspace assumptions.

Convenience Capacity

66. The convenience capacity assessment for Isle of Anglesey is set out in Table B5.7 which is reproduced below.

Table 3: Convenience Expenditure and Floorspace Capacity (sqm net)

	2024	2029	2035	2039
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£180.7	£175.1	£172.0	£169.9
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£180.7	£181.4	£182.3	£183.2
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£6.3	-£10.3	-£13.4
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		Considered Separately		
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£6.3	-£10.3	-£13.4
STEP 6: CAPACITY FOR CONVENIENCE FLOORSPACE:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,537	£12,600	£12,663
(ii) Net Floorspace Capacity (sq m):	-	-503	-818	-1,055
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-719	-1,168	-1,507	

Source: Appendix B5, Table B5.7

67. As would be expected given the forecast decline in available convenience expenditure, the capacity assessment indicates that there will be a small oversupply of convenience floorspace in Anglesey during the Plan period, rising from around 500 sqm net in 2029 to 1,055 sqm net in 2039.

68. The overall quantum of surplus spend and estimated floorspace is however small in the context of the area as a whole. It is likely to result in an incremental change to the quantum of convenience floorspace provided in a variety of outlets, or a number of stores failing to achieve the anticipated levels of productivity growth.

Whilst store closures cannot be ruled out, these would be more likely to be as a result of company trading decisions than local store performance, given the amount of surplus space in any single location will be very small.

Comparison Capacity

69. The comparison capacity assessment for Anglesey is set out in Table B6.7 which is reproduced below.

Table 4: Comparison Expenditure and Floorspace Capacity (sqm net)

		2024	2029	2035	2039
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£98.8	£103.1	£112.9	£123.7
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£98.8	£108.8	£123.1	£139.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£5.7	-£10.1	-£15.5
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)				Considered Separately
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£5.7	-£10.1	-£15.5
STEP 6:	CAPACITY FOR COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq	£6,000	£6,604	£7,472	£8,454
	(ii) Net Floorspace Capacity (sq m):	-	-858	-1,356	-1,834
	(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
	(iv) Gross Floorspace Capacity (sq m):		1,073	1,695	2,292

Source: Appendix B6, Table B6.7

70. For comparison floorspace, the assessment is again indicating an oversupply of floorspace in Anglesey in the future, with the uplift in expenditure per head and population increases insufficient to support the existing quantum of floorspace in the Council area.

71. However, again the over-supply of space is small in the context of overall provision and is the equivalent of the loss of a single medium-sized retail warehouse unit over the period to 2039. Alternatively if the existing quantum of floorspace were to be retained, existing businesses would be expected to see a slightly slower improvement in floorspace productivity.

Committed Retail Floorspace

72. It is also important to note that the convenience and comparison capacity assessments do not make any allowance for committed developments, which have been granted planning permission but which were not trading during 2024 when the Experian Insights expenditure data was collected.

73. This would suggest that there is now no quantitative need for the approved schemes, even if this had been demonstrated when permission was approved.

74. In practice however, whatever the overall quantitative assessment of need indicates in a local planning authority area, there is likely to be a continuing demand for new provision either as a result of identified gaps in retail provision, or commercial operator requirements. There may also be some 'churn' in space, as outdated floorspace no longer meets retailer needs and is replaced by other uses, with retailers seeking new space. There will therefore remain qualitative or localised requirements for additional retail provision, although at the present time we are not aware of any major retail commitments.

Retail Capacity Summary

75. PPW requires planning authorities to assess quantitative need in their area but recognises that this does not inevitably lead to a need being identified, and

therefore the allocation of site for new retail development is only required where capacity has been identified.

76. In this case there is no quantitative need for additional convenience or comparison retail floorspace in the Isle of Anglesey and therefore there is no requirement to allocate development sites to accommodate future retail developments.
77. It is also the case that the forecast 'surplus' of floorspace that is expected to arise over the plan period 2024 – 2039 is relatively small and as such, in itself does not suggest that there is a policy requirement to adjust centre boundaries or reallocate areas currently in retail use. However, this is considered in more detail when assessing the health of individual centres and considering an appropriate strategy for their future.

Appendices:

B1: DEFINED STUDY AREA & ZONES

B2: EXPERIAN INSIGHTS BASE DATA

B3: MARKET SHARES AND EXPENDITURE INFLOWS

B4: POPULATION AND RETAIL EXPENDITURE

B5: CONVENIENCE CAPACITY TABLES

B6: COMPARISON CAPACITY TABLES

APPENDIX B1: DEFINED STUDY AREA & ZONES



- Zone 1 - Island of Holyhead
- Zone 2 - Rest of Anglesey
- Zone 3 - Gwynedd County Borough
- Zone 4 - Conwy County Borough
- Zone 5 - Rest of the UK



APPENDIX B2: EXPERIAN INSIGHTS BASE DATA

TABLE B2.1 EXPERIAN INSIGHTS BASE DATA FOR 2024 - SUPERMARKET (CONVENIENCE) SPEND

Merchant location	Retail Location	Customer Location						Total Expenditure
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey	County (Zones 1 & 2)	Zone 3 - Gwynedd	Zone 4 - Conwy	
Zone 1 - Holyhead	Holyhead Town Centre	64,711	13,926	78,637	1,449	663	12,468	93,217
	Holyhead Retail Park	362,683	599,528	962,211	27,295	10,822	268,916	1,269,244
	Penrhos Retail Park	969,110	1,468,678	2,437,788	41,084	13,691	577,706	3,070,269
	Elsewhere in Holyhead Town	404,289	176,995	581,284	6,456	5,465	75,175	668,380
	Trearddur Bay	10,196	3,783	13,979	272	363	52,036	66,650
	Zone 1 - Elsewhere in Holyhead	1,261	1,311	2,572	204	27	2,997	5,800
Zone 1	Total	1,812,250	2,264,221	4,076,471	76,760	31,031	989,298	5,173,560
Zone 2 - Rest of Anglesey	Llangefni Town Centre	1,176	99,922	101,098	3,788	508	4,873	110,267
	Elsewhere in Llangefni	36,410	2,458,350	2,494,760	90,500	19,706	247,445	2,852,411
	Amlwch Local Centre	1,120	24,872	25,992	351	25	1,622	27,990
	Elsewhere in Amlwch	820	631,988	632,808	3,220	1,137	74,332	711,497
	Beaumaris Local Centre	72	26,816	26,888	797	741	26,970	55,396
	Elsewhere in Beaumaris	2,105	137,070	139,175	6,578	4,077	70,738	220,568
	Benllech Local Centre	295	73,670	73,965	1,165	150	14,903	90,183
	Elsewhere in Benllech	510	416,688	417,198	5,414	3,481	288,761	714,854
	Llanfairpwll Local Centre	1,260	17,412	18,672	2,986	335	4,319	26,312
	Elsewhere in Llanfairpwll	1,210	365,826	367,036	23,194	3,595	47,377	441,202
	Menai Bridge Local Centre	457	45,745	46,202	6,461	793	14,111	67,567
	Elsewhere in Menai Bridge	13,207	797,710	810,917	196,686	49,056	274,360	1,331,019
	Valley Local Centre	27,354	121,366	148,720	4,175	1,132	57,057	211,084
	Elsewhere in Valley	0	0	0	0	0	0	0
	Cemaes Local Centre	342	49,763	50,105	371	620	30,467	81,563
	Elsewhere in Cemaes	0	137	137	6	0	233	376
	Gaerwen Local Centre	489	42,289	42,778	3,974	175	1,523	48,450
	Rhosneigr Local Centre	927	26,728	27,655	477	263	66,495	94,890
	Elsewhere in Rhosneigr	30	1,949	1,979	19	15	2,389	4,402
	Zone 2 - Elsewhere In Anglesey	68,399	1,853,971	1,922,370	51,380	14,183	350,787	2,338,720
Zone 2	Total	156,183	7,192,272	7,348,455	401,542	99,992	1,578,762	9,428,751
Zone 3 - Gwynedd	Bangor Town Centre	1,922	29,859	31,781	63,456	11,790	17,414	124,441
	Elsewhere in Bangor	72,865	2,987,998	3,060,863	4,299,884	455,387	758,272	8,574,406
	Zone 3 - Elsewhere in Gwynedd	17,207	315,202	332,409	12,050,895	211,577	4,753,938	17,348,819
Zone 3	Total	91,994	3,333,059	3,425,053	16,414,235	678,754	5,529,624	26,047,666
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	24,046	256,321	280,367	454,443	13,484,095	3,231,107	17,450,012
Zone 4	Total	24,046	256,321	280,367	454,443	13,484,095	3,231,107	17,450,012
Out of Area	Elsewhere in Wales	14,235	145,515	159,750	854,128	1,666,397	390,954,057	393,634,332
	Chester City Centre	570	6,600	7,170	9,119	12,038	2,216,770	2,245,097
	Cheshire Oaks	476	9,874	10,350	19,813	21,821	4,151,421	4,203,405
	Elsewhere in Chester	2,986	20,779	23,765	46,989	68,463	21,913,573	22,052,790
	Liverpool City Centre	804	9,021	9,825	12,905	10,813	5,685,696	5,719,239
	Elsewhere in Liverpool	1,053	16,763	17,816	31,631	18,597	54,669,632	54,737,676
	Elsewhere in UK	78,147	665,549	743,696	992,995	805,591		2,542,282
Out of Area	Total	98,271	874,101	972,372	1,967,580	2,603,720	479,591,149	485,134,821
Online Expenditure		211,635	2,332,272	2,543,907	3,531,759	3,300,142		9,375,808
Total Expenditure		2,394,379	16,252,246	18,646,625	22,846,319	20,197,734	490,919,940	552,610,618

TABLE B2.2 EXPERIAN INSIGHTS BASE DATA FOR 2024 -NON-FOOD (COMPARISON) SPEND

Merchant location	Retail Location	Customer Location						Total Expenditure
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)	Zone 3 - Gwynedd	Zone 4 - Conwy	Rest of the UK	
Zone 1 - Holyhead	Holyhead Town Centre	30,181	16,081	46,262	547	95	10,197	57,101
	Holyhead Retail Park	167,469	319,283	486,752	21,572	3,973	79,341	591,638
	Penrhos Retail Park	110,032	180,616	290,648	11,520	3,329	59,264	364,761
	Elsewhere in Holyhead Town	115,410	89,953	205,363	6,651	3,675	35,452	251,141
	Trearddur Bay	15,471	8,040	23,511	500	464	18,506	42,981
	Zone 1 - Elsewhere in Holyhead	8,798	10,670	19,468	2,064	1,946	111,304	134,782
Zone 1	Total	447,361	624,643	1,072,004	42,854	13,482	314,064	1,442,404
Zone 2 - Rest of Anglesey	Llangefni Town Centre	6,650	83,194	89,844	7,895	918	16,875	115,532
	Elsewhere in Llangefni	32,105	1,134,543	1,166,648	61,804	12,405	93,899	1,334,756
	Amlwch Local Centre	384	50,174	50,558	671	179	3,930	55,338
	Elsewhere in Amlwch	25	82,127	82,152	564	8	7,027	89,751
	Beaumaris Local Centre	1,299	44,338	45,637	9,008	3,710	123,076	181,431
	Elsewhere in Beaumaris	1,269	46,693	47,962	7,435	4,039	100,758	160,194
	Benllech Local Centre	0	9,907	9,907	63	19	4,661	14,650
	Elsewhere in Benllech	9	44,962	44,971	1,772	257	11,921	58,921
	Llanfairpwll Local Centre	11,689	118,695	130,384	32,850	8,159	111,867	283,260
	Elsewhere in Llanfairpwll	410	58,627	59,037	17,974	83	879	77,973
	Menai Bridge Local Centre	1,343	58,043	59,386	28,315	2,374	23,158	113,233
	Elsewhere in Menai Bridge	4,646	65,897	70,543	37,673	2,792	14,256	125,264
	Valley Local Centre	11,555	50,320	61,875	1,940	726	1,598	66,139
	Elsewhere in Valley	125	405	530	0	0	116	646
	Cemaes Local Centre	61	5,690	5,751	79	38	4,677	10,545
	Elsewhere in Cemaes	38	9,369	9,407	133	181	666	10,387
	Gaerwen Local Centre	5,310	325,530	330,840	24,786	20,422	25,309	401,357
	Rhosneigr Local Centre	2,162	12,652	14,814	1,080	828	71,625	88,347
	Elsewhere in Rhosneigr	998	11,441	12,439	880	192	33,579	47,090
	Zone 2 - Elsewhere In Anglesey	83,049	743,233	826,282	80,863	22,689	198,072	1,127,906
Zone 2	Total	163,127	2,955,840	3,118,967	315,785	80,019	847,949	4,362,720
Zone 3 - Gwynedd	Bangor Town Centre	18,683	287,909	306,592	393,661	30,666	64,950	795,869
	Elsewhere in Bangor	113,813	1,664,013	1,777,826	1,896,971	288,631	446,816	4,410,244
	Zone 3 - Elsewhere in Gwynedd	15,360	415,971	431,331	4,701,153	150,265	2,587,896	7,870,645
Zone 3	Total	147,856	2,367,893	2,515,749	6,991,785	469,562	3,099,662	13,076,758
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	75,904	795,867	871,771	1,099,949	8,317,486	4,412,616	14,701,822
Zone 4	Total	75,904	795,867	871,771	1,099,949	8,317,486	4,412,616	14,701,822
Out of Area	Elsewhere in Wales	13,565	226,098	239,663	859,104	1,567,151	224,545,634	227,211,552
	Chester City Centre	9,399	74,111	83,510	145,153	174,955	9,885,289	10,288,907
	Cheshire Oaks	11,215	147,435	158,650	171,777	238,301	20,494,635	21,063,363
	Elsewhere in Chester	4,760	21,600	26,360	74,130	82,607	9,781,986	9,965,083
	Liverpool City Centre	10,765	119,511	130,276	176,492	108,548	28,104,839	28,520,155
	Elsewhere in Liverpool	2,722	44,088	46,810	45,853	32,899	33,136,767	33,262,329
	Elsewhere in UK	119,070	936,969	1,056,039	1,373,815	1,374,960		3,804,814
Out of Area	Total	171,496	1,569,812	1,741,308	2,846,324	3,579,421	325,949,150	334,116,203
Online Expenditure		847,259	6,241,682	7,088,941	9,295,501	8,667,516		25,051,958
Total Expenditure		1,853,003	14,555,737	16,408,740	20,592,198	21,127,486	334,623,441	392,751,865

TABLE B2.3 EXPERIAN INSIGHTS BASE DATA FOR 2024 - FOOD & DRINK LEISURE SPEND

Merchant location	Retail Location	Customer Location						Total Expenditure
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)	Zone 3 - Gwynedd	Zone 4 - Conwy	Rest of the UK	
Zone 1 - Holyhead	Holyhead Town Centre	50,331	26,626	76,957	2,135	1,363	23,888	104,343
	Holyhead Retail Park	34,482	54,107	88,589	4,601	1,345	28,395	122,930
	Penrhos Retail Park	2,789	1,878	4,667	509	73	3,083	8,332
	Elsewhere in Holyhead Town	124,797	110,976	235,773	7,424	4,287	71,978	319,462
	Trearddur Bay	81,179	98,625	179,804	12,976	7,322	474,698	674,800
	Zone 1 - Elsewhere in Holyhead	7,272	12,370	19,642	1,857	1,840	113,148	136,487
Zone 1	Total	300,850	304,582	605,432	29,502	16,230	715,190	1,366,354
Zone 2 - Rest of Anglesey	Llangefni Town Centre	1,065	47,389	48,454	2,043	533	7,145	58,175
	Elsewhere in Llangefni	1,910	65,749	67,659	6,757	2,431	7,420	84,267
	Amlwch Local Centre	377	41,472	41,849	506	217	6,591	49,163
	Elsewhere in Amlwch	1,264	70,801	72,065	1,765	916	22,287	97,033
	Beaumaris Local Centre	432	40,382	40,814	2,235	2,327	97,602	142,978
	Elsewhere in Beaumaris	1,568	86,071	87,639	11,960	5,111	227,389	332,099
	Benllech Local Centre	35	1,098	1,133	7	54	1,877	3,071
	Elsewhere in Benllech	736	73,722	74,458	2,548	3,024	182,672	262,702
	Llanfairpwll Local Centre	161	15,425	15,586	1,563	595	7,019	24,763
	Elsewhere in Llanfairpwll	413	23,959	24,372	7,914	1,519	10,743	44,548
	Menai Bridge Local Centre	2,656	144,738	147,394	41,978	7,223	80,994	277,589
	Elsewhere in Menai Bridge	7,290	261,052	268,342	100,972	23,332	331,434	724,080
	Valley Local Centre	22,334	73,806	96,140	8,600	3,334	90,350	198,424
	Elsewhere in Valley	109	3,073	3,182	370	70	1,187	4,809
	Cemaes Local Centre	101	16,735	16,836	237	300	16,236	33,609
	Elsewhere in Cemaes	167	9,662	9,829	319	284	21,767	32,199
	Gaerwen Local Centre	89	1,064	1,153	85	34	406	1,678
	Rhosneigr Local Centre	2,077	34,951	37,028	4,098	2,098	141,468	184,692
	Elsewhere in Rhosneigr	1,750	51,061	52,811	3,432	1,683	183,409	241,335
	Zone 2 - Elsewhere In Anglesey	17,910	581,114	599,024	80,469	36,512	1,172,875	1,888,880
Zone 2	Total	62,444	1,643,324	1,705,768	277,858	91,597	2,610,871	4,686,094
Zone 3 - Gwynedd	Bangor Town Centre	7,406	85,549	92,955	127,898	15,913	76,779	313,545
	Elsewhere in Bangor	11,918	249,504	261,422	292,511	26,621	128,375	708,929
	Zone 3 - Elsewhere in Gwynedd	21,542	292,747	314,289	3,287,320	184,599	6,517,547	10,303,755
Zone 3	Total	40,866	627,800	668,666	3,707,729	227,133	6,722,701	11,326,229
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	34,705	308,416	343,121	398,637	3,793,695	5,341,884	9,877,337
Zone 4	Total	34,705	308,416	343,121	398,637	3,793,695	5,341,884	9,877,337
Out of Area	Elsewhere in Wales	21,355	218,864	240,219	510,999	695,966	138,467,518	139,914,702
	Chester City Centre	9,427	64,522	73,949	100,550	144,977	8,333,733	8,653,209
	Cheshire Oaks	3,276	32,902	36,178	39,343	58,240	3,297,466	3,431,227
	Elsewhere in Chester	2,296	14,153	16,449	17,308	33,921	3,762,668	3,830,346
	Liverpool City Centre	9,677	89,047	98,724	124,721	103,682	24,188,590	24,515,717
	Elsewhere in Liverpool	3,627	30,785	34,412	40,612	42,470	18,800,528	18,918,022
	Elsewhere in UK	120,703	794,478	915,181	1,122,074	1,198,374		3,235,629
Out of Area	Total	170,361	1,244,751	1,415,112	1,955,607	2,277,630	196,850,503	202,498,852
Online Expenditure		109,677	472,473	582,150	733,359	1,136,909		2,452,418
Total Expenditure		718,903	4,601,346	5,320,249	7,102,692	7,543,194	212,241,149	232,207,284

TABLE B2.4 EXPERIAN INSIGHTS BASE DATA FOR 2024 - ENTERTAINMENT LEISURE SPEND

Merchant location	Retail Location	Customer Location						Total Expenditure
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)	Zone 3 - Gwynedd	Zone 4 - Conwy	Rest of the UK	
Zone 1 - Holyhead	Holyhead Town Centre	4,752	6,518	11,270	510	97	1,172	13,049
	Holyhead Retail Park	0	0	0	0	0	0	0
	Penrhos Retail Park	0	0	0	0	0	0	0
	Elsewhere in Holyhead Town	29,213	2,765	31,978	108	286	1,511	33,883
	Trearddur Bay	103	660	763	5	0	829	1,597
Zone 1	Zone 1 - Elsewhere in Holyhead	105	314	419	21	16	1,032	1,488
	Total	34,173	10,257	44,430	644	399	4,544	50,017
Zone 2 - Rest of Anglesey	Llangefni Town Centre	561	96,114	96,675	3,036	307	2,990	103,008
	Elsewhere in Llangefni	8	280	288	316	96	2,796	3,496
	Amlwch Local Centre	0	0	0	0	0	0	0
	Elsewhere in Amlwch	0	0	0	0	0	0	0
	Beaumaris Local Centre	350	3,685	4,035	1,176	1,608	48,195	55,014
	Elsewhere in Beaumaris	72	556	628	106	214	3,654	4,602
	Benllech Local Centre	0	0	0	0	0	0	0
	Elsewhere in Benllech	0	0	0	0	0	0	0
	Llanfairpwll Local Centre	0	0	0	0	0	0	0
	Elsewhere in Llanfairpwll	0	0	0	0	0	0	0
	Menai Bridge Local Centre	0	0	0	0	0	0	0
	Elsewhere in Menai Bridge	0	91	91	83	19	6	199
	Valley Local Centre	0	0	0	0	0	0	0
	Elsewhere in Valley	0	0	0	0	0	0	0
	Cemaes Local Centre	0	0	0	0	0	0	0
	Elsewhere in Cemaes	0	0	0	0	0	0	0
	Gaerwen Local Centre	0	0	0	0	0	0	0
	Rhosneigr Local Centre	0	0	0	0	0	0	0
Zone 2	Elsewhere in Rhosneigr	0	33	33	0	0	29	62
	Zone 2 - Elsewhere In Anglesey	3,098	39,378	42,476	13,632	7,267	117,605	180,980
Zone 2	Total	4,089	140,137	144,226	18,349	9,511	175,275	347,361
Zone 3 - Gwynedd	Bangor Town Centre	141	622	763	852	7	582	2,204
	Elsewhere in Bangor	14	499	513	1,802	110	1,540	3,965
	Zone 3 - Elsewhere in Gwynedd	3,664	30,642	34,306	185,790	23,088	929,977	1,173,161
Zone 3	Total	3,819	31,763	35,582	188,444	23,205	932,099	1,179,330
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	3,383	28,006	31,389	33,649	254,272	538,129	857,439
Zone 4	Total	3,383	28,006	31,389	33,649	254,272	538,129	857,439
Out of Area	Elsewhere in Wales	2,358	15,146	17,504	38,868	39,233	10,331,467	10,427,072
	Chester City Centre	75	487	562	1,031	1,116	117,287	119,996
	Cheshire Oaks	595	4,946	5,541	6,077	8,378	413,765	433,761
	Elsewhere in Chester	513	3,816	4,329	5,272	11,274	838,888	859,763
	Liverpool City Centre	260	2,702	2,962	4,696	4,005	921,317	932,980
	Elsewhere in Liverpool	316	1,141	1,457	3,028	2,154	1,388,289	1,394,928
	Elsewhere in UK	12,077	77,980	90,057	100,164	116,243		306,464
Out of Area	Total	16,194	106,218	122,412	159,136	182,403	14,011,013	14,474,964
Online Expenditure		103,390	559,303	662,693	712,443	876,206		2,251,342
Total Expenditure		165,048	875,684	1,040,732	1,112,665	1,345,996	15,661,060	19,160,453

APPENDIX B3: MARKET SHARES AND EXPENDITURE INFLOWS

TABLE B3.1: CONVENIENCE RETAIL MARKET SHARES AND INFLOWS 2024 (INC SFT)

Merchant location	Retail Location	Customer Location		% Inflow Total
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	
Zone 1 - Holyhead	Holyhead Town Centre	2.7%	0.1%	0.4%
	Holyhead Retail Park	15.1%	3.7%	5.2%
	Penrhos Retail Park	40.5%	9.0%	13.1%
	Elsewhere in Holyhead Town	16.9%	1.1%	3.1%
	Trearddur Bay	0.4%	0.0%	0.1%
	Zone 1 - Elsewhere in Holyhead	0.1%	0.0%	0.0%
Zone 1	Total	75.7%	13.9%	21.9%
Zone 2 - Rest of Anglesey	Llangefni Town Centre	0.0%	0.6%	0.5%
	Elsewhere in Llangefni	1.5%	15.1%	13.4%
	Amlwch Local Centre	0.0%	0.2%	0.1%
	Elsewhere in Amlwch	0.0%	3.9%	3.4%
	Beaumaris Local Centre	0.0%	0.2%	0.1%
	Elsewhere in Beaumaris	0.1%	0.8%	0.7%
	Benllech Local Centre	0.0%	0.5%	0.4%
	Elsewhere in Benllech	0.0%	2.6%	2.2%
	Llanfairpwll Local Centre	0.1%	0.1%	0.1%
	Elsewhere in Llanfairpwll	0.1%	2.3%	2.0%
	Menai Bridge Local Centre	0.0%	0.3%	0.2%
	Elsewhere in Menai Bridge	0.6%	4.9%	4.3%
	Valley Local Centre	1.1%	0.7%	0.8%
	Elsewhere in Valley	0.0%	0.0%	0.0%
	Cemaes Local Centre	0.0%	0.3%	0.3%
	Elsewhere in Cemaes	0.0%	0.0%	0.0%
	Gaerwen Local Centre	0.0%	0.3%	0.2%
	Rhosneigr Local Centre	0.0%	0.2%	0.1%
	Elsewhere in Rhosneigr	0.0%	0.0%	0.0%
	Zone 2 - Elsewhere In Anglesey	2.9%	11.4%	10.3%
Zone 2	Total	6.5%	44.3%	39.4%
Zone 3 - Gwynedd	Bangor Town Centre	0.1%	0.2%	0.2%
	Elsewhere in Bangor	3.0%	18.4%	16.4%
	Zone 3 - Elsewhere in Gwynedd	0.7%	1.9%	1.8%
Zone 3	Total	3.8%	20.5%	18.4%
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	1.0%	1.6%	1.5%
Zone 4	Total	1.0%	1.6%	1.5%
Out of Area	Elsewhere in Wales	0.6%	0.9%	0.9%
	Chester City Centre	0.0%	0.0%	0.0%
	Cheshire Oaks	0.0%	0.1%	0.1%
	Elsewhere in Chester	0.1%	0.1%	0.1%
	Liverpool City Centre	0.0%	0.1%	0.1%
	Elsewhere in Liverpool	0.0%	0.1%	0.1%
	Elsewhere in UK	3.3%	4.1%	4.0%
Out of Area	Total	4.1%	5.4%	5.2%
Online Expenditure		8.8%	14.4%	13.6%
Total Expenditure		100.0%	100.0%	100.0%

Notes: Derived from Table B2.1

TABLE B3.2: CONVENIENCE RETAIL TRADE DRAW BY CENTRE

Merchant Zone	Retail Location	Isle of Anglesey			Rest of UK			Grand Total
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)	Zone 3 - Gwynedd	Zone 4 - Conwy	Rest of the UK	
Zone 1 - Holyhead	Holyhead Town Centre	69.4%	14.9%	84.4%	1.6%	0.7%	13.4%	100.0%
	Holyhead Retail Park	28.6%	47.2%	75.8%	2.2%	0.9%	21.2%	100.0%
	Penrhos Retail Park	31.6%	47.8%	79.4%	1.3%	0.4%	18.8%	100.0%
	Elsewhere in Holyhead Town	60.5%	26.5%	87.0%	1.0%	0.8%	11.2%	100.0%
	Trearddur Bay	15.3%	5.7%	21.0%	0.4%	0.5%	78.1%	100.0%
	Zone 1 - Elsewhere in Holyhead	21.7%	22.6%	44.3%	3.5%	0.5%	51.7%	100.0%
Zone 2 - Rest of Anglesey	Llangefni Town Centre	1.1%	90.6%	91.7%	3.4%	0.5%	4.4%	100.0%
	Elsewhere in Llangefni	1.3%	86.2%	87.5%	3.2%	0.7%	8.7%	100.0%
	Amlwch Local Centre	4.0%	88.9%	92.9%	1.3%	0.1%	5.8%	100.0%
	Elsewhere in Amlwch	0.1%	88.8%	88.9%	0.5%	0.2%	10.4%	100.0%
	Beaumaris Local Centre	0.1%	48.4%	48.5%	1.4%	1.3%	48.7%	100.0%
	Elsewhere in Beaumaris	1.0%	62.1%	63.1%	3.0%	1.8%	32.1%	100.0%
	Benllech Local Centre	0.3%	81.7%	82.0%	1.3%	0.2%	16.5%	100.0%
	Elsewhere in Benllech	0.1%	58.3%	58.4%	0.8%	0.5%	40.4%	100.0%
	Llanfairpwll Local Centre	4.8%	66.2%	71.0%	11.3%	1.3%	16.4%	100.0%
	Elsewhere in Llanfairpwll	0.3%	82.9%	83.2%	5.3%	0.8%	10.7%	100.0%
	Menai Bridge Local Centre	0.7%	67.7%	68.4%	9.6%	1.2%	20.9%	100.0%
	Elsewhere in Menai Bridge	1.0%	59.9%	60.9%	14.8%	3.7%	20.6%	100.0%
	Valley Local Centre	13.0%	57.5%	70.5%	2.0%	0.5%	27.0%	100.0%
	Elsewhere in Valley	0.4%	61.0%	61.4%	0.5%	0.8%	37.4%	100.0%
	Cemaes Local Centre	0.0%	36.4%	36.4%	1.6%	0.0%	62.0%	100.0%
	Elsewhere in Cemaes	1.0%	87.3%	88.3%	8.2%	0.4%	3.1%	100.0%
	Gaerwen Local Centre	1.0%	28.2%	29.1%	0.5%	0.3%	70.1%	100.0%
	Rhosneigr Local Centre	0.7%	44.3%	45.0%	0.4%	0.3%	54.3%	100.0%
	Elsewhere in Rhosneigr	2.9%	79.3%	82.2%	2.2%	0.6%	15.0%	100.0%
	Zone 2 - Elsewhere in Anglesey							

Notes: Derived from Table B2.1

TABLE B3.3: COMPARISON RETAIL MARKET SHARES AND INFLOWS 2024 (INC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)	
Zone 1 - Holyhead	Holyhead Town Centre	1.6%	0.1%	0.3%	19.0%
	Holyhead Retail Park	9.0%	2.2%	3.0%	17.7%
	Penrhos Retail Park	5.9%	1.2%	1.8%	20.3%
	Elsewhere in Holyhead Town	6.2%	0.6%	1.3%	18.2%
	Trearddur Bay	0.8%	0.1%	0.1%	45.3%
	Zone 1 - Elsewhere in Holyhead	0.5%	0.1%	0.1%	85.6%
Zone 1	Total	24.1%	4.3%	6.5%	25.7%
Zone 2 - Rest of Anglesey	Llangefni Town Centre	0.4%	0.6%	0.5%	22.2%
	Elsewhere in Llangefni	1.7%	7.8%	7.1%	12.6%
	Amlwch Local Centre	0.0%	0.3%	0.3%	8.6%
	Elsewhere in Amlwch	0.0%	0.6%	0.5%	8.5%
	Beaumaris Local Centre	0.1%	0.3%	0.3%	74.8%
	Elsewhere in Beaumaris	0.1%	0.3%	0.3%	70.1%
	Benllech Local Centre	0.0%	0.1%	0.1%	32.4%
	Elsewhere in Benllech	0.0%	0.3%	0.3%	23.7%
	Llanfairpwll Local Centre	0.6%	0.8%	0.8%	54.0%
	Elsewhere in Llanfairpwll	0.0%	0.4%	0.4%	24.3%
	Menai Bridge Local Centre	0.1%	0.4%	0.4%	47.6%
	Elsewhere in Menai Bridge	0.3%	0.5%	0.4%	43.7%
	Valley Local Centre	0.6%	0.3%	0.4%	6.4%
	Elsewhere in Valley	0.0%	0.0%	0.0%	18.0%
	Cemaes Local Centre	0.0%	0.0%	0.0%	45.5%
	Elsewhere in Cemaes	0.0%	0.1%	0.1%	9.4%
	Gaerwen Local Centre	0.3%	2.2%	2.0%	17.6%
	Rhosneigr Local Centre	0.1%	0.1%	0.1%	83.2%
	Elsewhere in Rhosneigr	0.1%	0.1%	0.1%	73.6%
	Zone 2 - Elsewhere In Anglesey	4.5%	5.1%	5.0%	26.7%
Zone 2	Total	8.8%	20.3%	19.0%	28.5%
Zone 3 - Gwynedd	Bangor Town Centre	1.0%	2.0%	1.9%	
	Elsewhere in Bangor	6.1%	11.4%	10.8%	
	Zone 3 - Elsewhere in Gwynedd	0.8%	2.9%	2.6%	
Zone 3	Total	8.0%	16.3%	15.3%	
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	4.1%	5.5%	5.3%	
Zone 4	Total	4.1%	5.5%	5.3%	
Out of Area	Elsewhere in Wales	0.7%	1.6%	1.5%	
	Chester City Centre	0.5%	0.5%	0.5%	
	Cheshire Oaks	0.6%	1.0%	1.0%	
	Elsewhere in Chester	0.3%	0.1%	0.2%	
	Liverpool City Centre	0.6%	0.8%	0.8%	
	Elsewhere in Liverpool	0.1%	0.3%	0.3%	
	Elsewhere in UK	6.4%	6.4%	6.4%	
Out of Area	Total	9.3%	10.8%	10.6%	
Online Expenditure		45.7%	42.9%	43.2%	
Total Expenditure		100.0%	100.0%	100.0%	

TABLE B3.4: COMPARISON RETAIL TRADE DRAW BY CENTRE

Merchant Zone	Retail Location	Isle of Anglesey			Rest of UK			Grand Total
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)	Zone 3 - Gwynedd	Zone 4 - Conwy	Rest of the UK	
Zone 1 - Holyhead	Holyhead Town Centre	52.9%	28.2%	81.0%	1.0%	0.2%	17.9%	100.0%
	Holyhead Retail Park	28.3%	54.0%	82.3%	3.6%	0.7%	13.4%	100.0%
	Penrhos Retail Park	30.2%	49.5%	79.7%	3.2%	0.9%	16.2%	100.0%
	Elsewhere in Holyhead Town	46.0%	35.8%	81.8%	2.6%	1.5%	14.1%	100.0%
	Trearddur Bay	36.0%	18.7%	54.7%	1.2%	1.1%	43.1%	100.0%
	Zone 1 - Elsewhere in Holyhead	6.5%	7.9%	14.4%	1.5%	1.4%	82.6%	100.0%
Zone 2 - Rest of Anglesey	Llangefni Town Centre	5.8%	72.0%	77.8%	6.8%	0.8%	14.6%	100.0%
	Elsewhere in Llangefni	2.4%	85.0%	87.4%	4.6%	0.9%	7.0%	100.0%
	Amlwch Local Centre	0.7%	90.7%	91.4%	1.2%	0.3%	7.1%	100.0%
	Elsewhere in Amlwch	0.0%	91.5%	91.5%	0.6%	0.0%	7.8%	100.0%
	Beaumaris Local Centre	0.7%	24.4%	25.2%	5.0%	2.0%	67.8%	100.0%
	Elsewhere in Beaumaris	0.8%	29.1%	29.9%	4.6%	2.5%	62.9%	100.0%
	Benllech Local Centre	0.0%	67.6%	67.6%	0.4%	0.1%	31.8%	100.0%
	Elsewhere in Benllech	0.0%	76.3%	76.3%	3.0%	0.4%	20.2%	100.0%
	Llanfairpwll Local Centre	4.1%	41.9%	46.0%	11.6%	2.9%	39.5%	100.0%
	Elsewhere in Llanfairpwll	0.5%	75.2%	75.7%	23.1%	0.1%	1.1%	100.0%
	Menai Bridge Local Centre	1.2%	51.3%	52.4%	25.0%	2.1%	20.5%	100.0%
	Elsewhere in Menai Bridge	3.7%	52.6%	56.3%	30.1%	2.2%	11.4%	100.0%
	Valley Local Centre	17.5%	76.1%	93.6%	2.9%	1.1%	2.4%	100.0%
	Elsewhere in Valley							
	Cemaes Local Centre	0.6%	54.0%	54.5%	0.7%	0.4%	44.4%	100.0%
	Elsewhere in Cemaes	0.4%	90.2%	90.6%	1.3%	1.7%	6.4%	100.0%
	Gaerwen Local Centre	1.3%	81.1%	82.4%	6.2%	5.1%	6.3%	100.0%
	Rhosneigr Local Centre	2.4%	14.3%	16.8%	1.2%	0.9%	81.1%	100.0%
	Elsewhere in Rhosneigr	2.1%	24.3%	26.4%	1.9%	0.4%	71.3%	100.0%
	Zone 2 - Elsewhere In Anglesey	7.4%	65.9%	73.3%	7.2%	2.0%	17.6%	100.0%

TABLE B3.5: LEISURE FOOD & DRINK MARKET SHARES AND INFLOWS 2024 (INC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)	
Zone 1 - Holyhead	Holyhead Town Centre	7.0%	0.6%	1.4%	26.2%
	Holyhead Retail Park	4.8%	1.2%	1.7%	27.9%
	Penrhos Retail Park	0.4%	0.0%	0.1%	44.0%
	Elsewhere in Holyhead Town	17.4%	2.4%	4.4%	26.2%
	Trearddur Bay	11.3%	2.1%	3.4%	73.4%
	Zone 1 - Elsewhere in Holyhead	1.0%	0.3%	0.4%	85.6%
Zone 1	Total	41.8%	6.6%	11.4%	55.7%
Zone 2 - Rest of Anglesey	Llangefni Town Centre	0.1%	1.0%	0.9%	16.7%
	Elsewhere in Llangefni	0.3%	1.4%	1.3%	19.7%
	Amlwch Local Centre	0.1%	0.9%	0.8%	14.9%
	Elsewhere in Amlwch	0.2%	1.5%	1.4%	25.7%
	Beaumaris Local Centre	0.1%	0.9%	0.8%	71.5%
	Elsewhere in Beaumaris	0.2%	1.9%	1.6%	73.6%
	Benllech Local Centre	0.0%	0.0%	0.0%	63.1%
	Elsewhere in Benllech	0.1%	1.6%	1.4%	71.7%
	Llanfairpwll Local Centre	0.0%	0.3%	0.3%	37.1%
	Elsewhere in Llanfairpwll	0.1%	0.5%	0.5%	45.3%
	Menai Bridge Local Centre	0.4%	3.1%	2.8%	46.9%
	Elsewhere in Menai Bridge	1.0%	5.7%	5.0%	62.9%
	Valley Local Centre	3.1%	1.6%	1.8%	51.5%
	Elsewhere in Valley	0.0%	0.1%	0.1%	33.8%
	Cemaes Local Centre	0.0%	0.4%	0.3%	49.9%
	Elsewhere in Cemaes	0.0%	0.2%	0.2%	69.5%
	Gaerwen Local Centre	0.0%	0.0%	0.0%	31.3%
	Rhosneigr Local Centre	0.3%	0.8%	0.7%	80.0%
	Elsewhere in Rhosneigr	0.2%	1.1%	1.0%	78.1%
	Zone 2 - Elsewhere In Anglesey	2.5%	12.6%	11.3%	68.3%
Zone 2	Total	8.7%	35.7%	32.1%	63.6%
Zone 3 - Gwynedd	Bangor Town Centre	1.0%	1.9%	1.7%	
	Elsewhere in Bangor	1.7%	5.4%	4.9%	
	Zone 3 - Elsewhere in Gwynedd	3.0%	6.4%	5.9%	
Zone 3	Total	5.7%	13.6%	12.6%	
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	4.8%	6.7%	6.4%	
Zone 4	Total	4.8%	6.7%	6.4%	
Out of Area	Elsewhere in Wales	3.0%	4.8%	4.5%	
	Chester City Centre	1.3%	1.4%	1.4%	
	Cheshire Oaks	0.5%	0.7%	0.7%	
	Elsewhere in Chester	0.3%	0.3%	0.3%	
	Liverpool City Centre	1.3%	1.9%	1.9%	
	Elsewhere in Liverpool	0.5%	0.7%	0.6%	
Out of Area	Elsewhere in UK	16.8%	17.3%	17.2%	
	Total	23.7%	27.1%	26.6%	
Online Expenditure		15.3%	10.3%	10.9%	
Total Expenditure		100.0%	100.0%	100.0%	

TABLE B3.6: LEISURE FOOD AND DRINK TRADE DRAW BY CENTRE

Merchant Zone	Retail Location	Isle of Anglesey			Rest of UK			Grand Total
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)	Zone 3 - Gwynedd	Zone 4 - Conwy	Rest of the UK	
Zone 1 - Holyhead	Holyhead Town Centre	48.2%	25.5%	73.8%	2.0%	1.3%	22.9%	100.0%
	Holyhead Retail Park	28.1%	44.0%	72.1%	3.7%	1.1%	23.1%	100.0%
	Penrhos Retail Park	33.5%	22.5%	56.0%	6.1%	0.9%	37.0%	100.0%
	Elsewhere in Holyhead Town	39.1%	34.7%	73.8%	2.3%	1.3%	22.5%	100.0%
	Trearddur Bay	12.0%	14.6%	26.6%	1.9%	1.1%	70.3%	100.0%
	Zone 1 - Elsewhere in Holyhead	5.3%	9.1%	14.4%	1.4%	1.3%	82.9%	100.0%
Zone 2 - Rest of Anglesey	Llangefni Town Centre	1.8%	81.5%	83.3%	3.5%	0.9%	12.3%	100.0%
	Elsewhere in Llangefni	2.3%	78.0%	80.3%	8.0%	2.9%	8.8%	100.0%
	Amlwch Local Centre	0.8%	84.4%	85.1%	1.0%	0.4%	13.4%	100.0%
	Elsewhere in Amlwch	1.3%	73.0%	74.3%	1.8%	0.9%	23.0%	100.0%
	Beaumaris Local Centre	0.3%	28.2%	28.5%	1.6%	1.6%	68.3%	100.0%
	Elsewhere in Beaumaris	0.5%	25.9%	26.4%	3.6%	1.5%	68.5%	100.0%
	Benllech Local Centre	1.1%	35.8%	36.9%	0.2%	1.8%	61.1%	100.0%
	Elsewhere in Benllech	0.3%	28.1%	28.3%	1.0%	1.2%	69.5%	100.0%
	Llanfairpwll Local Centre	0.7%	62.3%	62.9%	6.3%	2.4%	28.3%	100.0%
	Elsewhere in Llanfairpwll	0.9%	53.8%	54.7%	17.8%	3.4%	24.1%	100.0%
	Menai Bridge Local Centre	1.0%	52.1%	53.1%	15.1%	2.6%	29.2%	100.0%
	Elsewhere in Menai Bridge	1.0%	36.1%	37.1%	13.9%	3.2%	45.8%	100.0%
	Valley Local Centre	11.3%	37.2%	48.5%	4.3%	1.7%	45.5%	100.0%
	Elsewhere in Valley							
	Cemaes Local Centre	0.3%	49.8%	50.1%	0.7%	0.9%	48.3%	100.0%
	Elsewhere in Cemaes	0.5%	30.0%	30.5%	1.0%	0.9%	67.6%	100.0%
	Gaerwen Local Centre	5.3%	63.4%	68.7%	5.1%	2.0%	24.2%	100.0%
	Rhosneigr Local Centre	1.1%	18.9%	20.0%	2.2%	1.1%	76.6%	100.0%
	Elsewhere in Rhosneigr	0.7%	21.2%	21.9%	1.4%	0.7%	76.0%	100.0%
	Zone 2 - Elsewhere In Anglesey	0.9%	30.8%	31.7%	4.3%	1.9%	62.1%	100.0%

TABLE B3.7: ENTERTAINMENT LEISURE MARKET SHARES AND INFLOWS 2024 (INC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)	
Zone 1 - Holyhead	Holyhead Town Centre	2.9%	0.7%	1.1%	13.6%
	Holyhead Retail Park	0.0%	0.0%	0.0%	0.0%
	Penrhos Retail Park	0.0%	0.0%	0.0%	0.0%
	Elsewhere in Holyhead Town	17.7%	0.3%	3.1%	5.6%
	Trearddur Bay	0.1%	0.1%	0.1%	52.2%
Zone 1 - Elsewhere in Holyhead		0.1%	0.0%	0.0%	71.8%
Zone 1	Total	20.7%	1.2%	4.3%	11.2%
Zone 2 - Rest of Anglesey	Llangefni Town Centre	0.3%	11.0%	9.3%	6.1%
	Elsewhere in Llangefni	0.0%	0.0%	0.0%	91.8%
	Amlwch Local Centre	0.0%	0.0%	0.0%	0.0%
	Elsewhere in Amlwch	0.0%	0.0%	0.0%	0.0%
	Beaumaris Local Centre	0.2%	0.4%	0.4%	92.7%
	Elsewhere in Beaumaris	0.0%	0.1%	0.1%	86.4%
	Benllech Local Centre	0.0%	0.0%	0.0%	0.0%
	Elsewhere in Benllech	0.0%	0.0%	0.0%	0.0%
	Llanfairpwll Local Centre	0.0%	0.0%	0.0%	0.0%
	Elsewhere in Llanfairpwll	0.0%	0.0%	0.0%	0.0%
	Menai Bridge Local Centre	0.0%	0.0%	0.0%	0.0%
	Elsewhere in Menai Bridge	0.0%	0.0%	0.0%	54.3%
	Valley Local Centre	0.0%	0.0%	0.0%	0.0%
	Elsewhere in Valley	0.0%	0.0%	0.0%	0.0%
	Cemaes Local Centre	0.0%	0.0%	0.0%	0.0%
	Elsewhere in Cemaes	0.0%	0.0%	0.0%	0.0%
	Gaerwen Local Centre	0.0%	0.0%	0.0%	0.0%
	Rhosneigr Local Centre	0.0%	0.0%	0.0%	0.0%
	Elsewhere in Rhosneigr	0.0%	0.0%	0.0%	46.8%
Zone 2 - Elsewhere In Anglesey		1.9%	4.5%	4.1%	76.5%
Zone 2	Total	2.5%	16.0%	13.9%	58.5%
Zone 3 - Gwynedd	Bangor Town Centre	0.1%	0.1%	0.1%	
	Elsewhere in Bangor	0.0%	0.1%	0.0%	
	Zone 3 - Elsewhere in Gwynedd	2.2%	3.5%	3.3%	
Zone 3	Total	2.3%	3.6%	3.4%	
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	2.0%	3.2%	3.0%	
Zone 4	Total	2.0%	3.2%	3.0%	
Out of Area	Elsewhere in Wales	1.4%	1.7%	1.7%	
	Chester City Centre	0.0%	0.1%	0.1%	
	Cheshire Oaks	0.4%	0.6%	0.5%	
	Elsewhere in Chester	0.3%	0.4%	0.4%	
	Liverpool City Centre	0.2%	0.3%	0.3%	
	Elsewhere in Liverpool	0.2%	0.1%	0.1%	
	Elsewhere in UK	7.3%	8.9%	8.7%	
Out of Area	Total	9.8%	12.1%	11.8%	
Online Expenditure		62.6%	63.9%	63.7%	
Total Expenditure		100.0%	100.0%	100.0%	

APPENDIX B4: POPULATION AND RETAIL EXPENDITURE

TABLE B4.1: BASE YEAR POPULATION & PROJECTIONS (2023 - 2039)

	2023	2024	2029	2034	2039	Growth 2024 to 2034:	Growth 2024 to 2039:			
						%	No.	%	No.	
Zone 1	Holyhead	14,161	14,311	14,294	14,366	14,508	0.4%	55	1.4%	197
Zone 2	Rest of Anglesey	55,130	55,228	55,068	54,840	54,691	-0.7%	-388	-1.0%	-537
Total Study Area (Isle of Anglesey):		69,291	69,539	69,362	69,206	69,199	-0.5%	-333	-0.5%	-340

Notes Population Projections from Experian Location Analyst (based on ONS)

TABLE B4.2: CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (2023 to 2039)

	Including SFT					
	2023	2024	2029	2034	2039	
Zone 1	Holyhead	£3,146	£3,089	£3,019	£2,989	£2,968
Zone 2	Rest of Anglesey	£3,312	£3,252	£3,178	£3,147	£3,125
Total Study Area (Isle of Anglesey):		£3,278	£3,219	£3,146	£3,114	£3,093

Notes: Average spend per capita estimates (2023 prices) are derived from Experian 'Location Analyst' Reports. The year-on-year expenditure growth forecasts have been informed by Experian's Retail Planner Briefing Note 22 (March 2025).

Forecast growth in available spend is informed by the year-on-year national growth forecasts as published in Experian's Retail Planner Briefing Note 22 (March 2025).

TABLE B4.3: CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (2024 to 2039) ADJUSTED FOR SFT AND SALES IN NON-FOOD OUTLETS

	Excluding SFT				
	2024	2029	2034	2039	
Zone 1	Holyhead	£2,868	£2,787	£2,743	£2,708
Zone 2	Rest of Anglesey	£3,020	£2,934	£2,887	£2,850
Total Study Area (Isle of Anglesey):		£2,989	£2,904	£2,858	£2,821

Notes: For 2024 an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) using the data from Experian Insights (Tables B3.1)

For 2025 - 2039 the growth in SFT is based on estimates provided in Experian's Retail Planner Briefing Note 22 (March 2025)

Available convenience spend is decreased by LSH estimate of sales in non-food and variety stores

TABLE B4.4: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE (£million) (2024 to 2039)

	Excluding Special Forms of Trading (SFT) (£m)				Growth 2024 to 2034:	Growth 2024 to 2039:			
	2024	2029	2034	2039	%	No.	%	No.	
Zone 1	Holyhead	£41.05	£39.83	£39.40	£39.28	-4.0%	-£1.65	-4.3%	-£1.77
Zone 2	Rest of Anglesey	£166.78	£161.56	£158.35	£155.89	-5.1%	-£8.43	-6.5%	-£10.89
Total Study Area (Isle of Anglesey):		£207.83	£201.39	£197.75	£195.17	-4.8%	-£10.08	-6.1%	-£12.66

Notes: Derived from Tables B4.1 & B4.3

TABLE B4.5: COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (2023 to 2039)

		Including SFT			
		2024	2029	2034	2039
Zone 1	Holyhead	£3,814	£3,776	£4,107	£4,674
Zone 2	Rest of Anglesey	£4,177	£4,135	£4,498	£5,119
Total Study Area (Isle of Anglesey):		£4,102	£4,061	£4,417	£5,027
					£5,704

Notes: Average spend per capita estimates (2023 prices) are derived from Experian 'Location Analyst' Reports. The year-on-year expenditure growth forecasts have been informed by Experian's Retail Planner Briefing Note 22 (March 2025).

Forecast growth in available spend is informed by the year-on-year national growth forecasts as published in Experian's Retail Planner Briefing Note 22 (March 2025).

TABLE B4.6: COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (2024 to 2039) ADJUSTED FOR SFT AND SALES IN FOOD OUTLETS

		Excluding SFT			
		2024	2029	2034	2039
Zone 1	Holyhead	£2,328	£2,435	£2,672	£2,926
Zone 2	Rest of Anglesey	£2,549	£2,666	£2,926	£3,204
Total Study Area (Isle of Anglesey):		£2,504	£2,619	£2,874	£3,147

Notes: For 2024 an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) using the data from Experian Insights (Tables B3.1)

For 2025 - 2039 the growth in SFT is based on estimates provided in Experian's Retail Planner Briefing Note 22 (March 2025)

Available comparison spend is decreased by LSH estimate of sales in food and grocery stores

TABLE B4.7: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE (£million) (2024 to 2039)

		Excluding Special Forms of Trading (SFT) (£m)				Growth 2024 to 2034:	Growth 2024 to 2039:
		2024	2029	2034	2039	%	No.
Zone 1	Holyhead	£33.31	£34.80	£38.38	£42.45	15.2%	£5.07
Zone 2	Rest of Anglesey	£140.80	£146.84	£160.47	£175.25	14.0%	£19.67
Total Study Area (Isle of Anglesey):		£174.11	£181.64	£198.85	£217.70	14.2%	£24.74

Notes: Derived from Tables B4.1 & B4.6

APPENDIX B5: CONVENIENCE CAPACITY TABLES

TABLE B5.1: CONVENIENCE MARKET SHARES 2024 (EXC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)	
Zone 1 - Holyhead	Holyhead Town Centre	3.0%	0.1%	0.5%	15.6%
	Holyhead Retail Park	16.6%	4.3%	6.0%	24.2%
	Penrhos Retail Park	44.4%	10.6%	15.1%	20.6%
	Elsewhere in Holyhead Town	18.5%	1.3%	3.6%	13.0%
	Trearddur Bay	0.5%	0.0%	0.1%	79.0%
	Zone 1 - Elsewhere in Holyhead	0.1%	0.0%	0.0%	55.7%
Zone 1	Total	83.0%	16.3%	25.3%	21.2%
Zone 2 - Rest of Anglesey	Llangefni Town Centre	0.1%	0.7%	0.6%	8.3%
	Elsewhere in Llangefni	1.7%	17.7%	15.5%	12.5%
	Amlwch Local Centre	0.1%	0.2%	0.2%	7.1%
	Elsewhere in Amlwch	0.0%	4.5%	3.9%	11.1%
	Beaumaris Local Centre	0.0%	0.2%	0.2%	51.5%
	Elsewhere in Beaumaris	0.1%	1.0%	0.9%	36.9%
	Benllech Local Centre	0.0%	0.5%	0.5%	18.0%
	Elsewhere in Benllech	0.0%	3.0%	2.6%	41.6%
	Llanfairpwll Local Centre	0.1%	0.1%	0.1%	29.0%
	Elsewhere in Llanfairpwll	0.1%	2.6%	2.3%	16.8%
	Menai Bridge Local Centre	0.0%	0.3%	0.3%	31.6%
	Elsewhere in Menai Bridge	0.6%	5.7%	5.0%	39.1%
	Valley Local Centre	1.3%	0.9%	0.9%	29.5%
	Elsewhere in Valley	0.0%	0.0%	0.0%	#DIV/0!
	Cemaes Local Centre	0.0%	0.4%	0.3%	38.6%
	Elsewhere in Cemaes	0.0%	0.0%	0.0%	63.6%
	Gaerwen Local Centre	0.0%	0.3%	0.3%	11.7%
	Rhosneigr Local Centre	0.0%	0.2%	0.2%	70.9%
	Elsewhere in Rhosneigr	0.0%	0.0%	0.0%	55.0%
	Zone 2 - Elsewhere In Anglesey	3.1%	13.3%	11.9%	17.8%
Zone 2	Total	7.2%	51.7%	45.6%	22.1%
Zone 3 - Gwynedd	Bangor Town Centre	0.1%	0.2%	0.2%	
	Elsewhere in Bangor	3.3%	21.5%	19.0%	
	Zone 3 - Elsewhere in Gwynedd	0.8%	2.3%	2.1%	
Zone 3	Total	4.2%	23.9%	21.3%	
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	1.1%	1.8%	1.7%	
Zone 4	Total	1.1%	1.8%	1.7%	
Out of Area	Elsewhere in Wales	0.7%	1.0%	1.0%	
	Chester City Centre	0.0%	0.0%	0.0%	
	Cheshire Oaks	0.0%	0.1%	0.1%	
	Elsewhere in Chester	0.1%	0.1%	0.1%	
	Liverpool City Centre	0.0%	0.1%	0.1%	
	Elsewhere in Liverpool	0.0%	0.1%	0.1%	
	Elsewhere in UK	3.6%	4.8%	4.6%	
Out of Area	Total	4.5%	6.3%	6.0%	
Online Expenditure					
Total Expenditure		100.0%	100.0%	100.0%	

Notes

Calculated from Table B3.1

TABLE B5.2: AVAILABLE CONVENIENCE SPEND 2024 (EXC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total	Total Convenience Spend (£m)
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)		
Available Convenience Spend 2024		£41.05	£166.78	£207.83		
Zone 1 - Holyhead	Holyhead Town Centre	£1.22	£0.17	£1.38	15.6%	£1.60
	Holyhead Retail Park	£6.82	£7.18	£14.00	24.2%	£17.39
	Penrhos Retail Park	£18.23	£17.60	£35.82	20.6%	£43.20
	Elsewhere in Holyhead Town	£7.60	£2.12	£9.72	13.0%	£10.99
	Trearddur Bay	£0.19	£0.05	£0.24	79.0%	£0.42
	Zone 1 - Elsewhere in Holyhead	£0.02	£0.02	£0.04	55.7%	£0.06
Zone 1	Total	£34.08	£27.13	£61.21		£73.67
Zone 2 - Rest of Anglesey	Llangefni Town Centre	£0.02	£1.20	£1.22	8.3%	£1.32
	Elsewhere in Llangefni	£0.68	£29.45	£30.14	12.5%	£33.92
	Amlwch Local Centre	£0.02	£0.30	£0.32	7.1%	£0.34
	Elsewhere in Amlwch	£0.02	£7.57	£7.59	11.1%	£8.43
	Beaumaris Local Centre	£0.00	£0.32	£0.32	51.5%	£0.49
	Elsewhere in Beaumaris	£0.04	£1.64	£1.68	36.9%	£2.30
	Benllech Local Centre	£0.01	£0.88	£0.89	18.0%	£1.05
	Elsewhere in Benllech	£0.01	£4.99	£5.00	41.6%	£7.08
	Llanfairpwll Local Centre	£0.02	£0.21	£0.23	29.0%	£0.30
	Elsewhere in Llanfairpwll	£0.02	£4.38	£4.41	16.8%	£5.15
	Menai Bridge Local Centre	£0.01	£0.55	£0.56	31.6%	£0.73
	Elsewhere in Menai Bridge	£0.25	£9.56	£9.81	39.1%	£13.64
	Valley Local Centre	£0.51	£1.45	£1.97	29.5%	£2.55
	Elsewhere in Valley	£0.00	£0.00	£0.00	0.0%	£0.00
	Cemaes Local Centre	£0.01	£0.60	£0.60	38.6%	£0.84
	Elsewhere in Cemaes	£0.00	£0.00	£0.00	63.6%	£0.00
	Gaerwen Local Centre	£0.01	£0.51	£0.52	11.7%	£0.58
	Rhosneigr Local Centre	£0.02	£0.32	£0.34	70.9%	£0.58
	Elsewhere in Rhosneigr	£0.00	£0.02	£0.02	55.0%	£0.04
	Zone 2 - Elsewhere In Anglesey	£1.29	£22.21	£23.50	17.8%	£27.68
Zone 2	Total	£2.94	£86.17	£89.11		£107.01
Zone 3 - Gwynedd	Bangor Town Centre	£0.04	£0.36	£0.39		
	Elsewhere in Bangor	£1.37	£35.80	£37.17		
	Zone 3 - Elsewhere in Gwynedd	£0.32	£3.78	£4.10		
Zone 3	Total	£1.73	£39.93	£41.66		
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	£0.45	£3.07	£3.52		
Zone 4	Total	£0.45	£3.07	£3.52		
Out of Area	Elsewhere in Wales	£0.27	£1.74	£2.01		
	Chester City Centre	£0.01	£0.08	£0.09		
	Cheshire Oaks	£0.01	£0.12	£0.13		
	Elsewhere in Chester	£0.06	£0.25	£0.31		
	Liverpool City Centre	£0.02	£0.11	£0.12		
	Elsewhere in Liverpool	£0.02	£0.20	£0.22		
	Elsewhere in UK	£1.47	£7.97	£9.44		
Out of Area	Total	£1.85	£10.47	£12.32		
Total Expenditure		£41.05	£166.78	£207.83		

Notes

Calculated from Tables B5.1 & B4.4

TABLE B5.3: AVAILABLE CONVENIENCE SPEND 2029 (EXC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total	Total Convenience Spend (£m)
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)		
Available Convenience Spend 2029		£39.83	£161.56	£201.39		
Zone 1 - Holyhead	Holyhead Town Centre	£1.18	£0.16	£1.34	15.6%	£1.55
	Holyhead Retail Park	£6.62	£6.96	£13.58	24.2%	£16.86
	Penrhos Retail Park	£17.69	£17.05	£34.73	20.6%	£41.89
	Elsewhere in Holyhead Town	£7.38	£2.05	£9.43	13.0%	£10.66
	Trearddur Bay	£0.19	£0.04	£0.23	79.0%	£0.41
	Zone 1 - Elsewhere in Holyhead	£0.02	£0.02	£0.04	55.7%	£0.06
Zone 1	Total	£33.07	£26.28	£59.35		£71.43
Zone 2 - Rest of Anglesey	Llangefni Town Centre	£0.02	£1.16	£1.18	8.3%	£1.28
	Elsewhere in Llangefni	£0.66	£28.53	£29.20	12.5%	£32.86
	Amlwch Local Centre	£0.02	£0.29	£0.31	7.1%	£0.33
	Elsewhere in Amlwch	£0.01	£7.33	£7.35	11.1%	£8.16
	Beaumaris Local Centre	£0.00	£0.31	£0.31	51.5%	£0.47
	Elsewhere in Beaumaris	£0.04	£1.59	£1.63	36.9%	£2.23
	Benllech Local Centre	£0.01	£0.86	£0.86	18.0%	£1.02
	Elsewhere in Benllech	£0.01	£4.84	£4.85	41.6%	£6.86
	Llanfairpwll Local Centre	£0.02	£0.20	£0.23	29.0%	£0.29
	Elsewhere in Llanfairpwll	£0.02	£4.25	£4.27	16.8%	£4.99
	Menai Bridge Local Centre	£0.01	£0.53	£0.54	31.6%	£0.71
	Elsewhere in Menai Bridge	£0.24	£9.26	£9.50	39.1%	£13.21
	Valley Local Centre	£0.50	£1.41	£1.91	29.5%	£2.47
	Elsewhere in Valley	£0.00	£0.00	£0.00	0.0%	£0.00
	Cemaes Local Centre	£0.01	£0.58	£0.58	38.6%	£0.81
	Elsewhere in Cemaes	£0.00	£0.00	£0.00	63.6%	£0.00
	Gaerwen Local Centre	£0.01	£0.49	£0.50	11.7%	£0.56
	Rhosneigr Local Centre	£0.02	£0.31	£0.33	70.9%	£0.56
	Elsewhere in Rhosneigr	£0.00	£0.02	£0.02	55.0%	£0.04
	Zone 2 - Elsewhere In Anglesey	£1.25	£21.52	£22.77	17.8%	£26.82
Zone 2	Total	£2.85	£83.47	£86.32		£103.66
Zone 3 - Gwynedd	Bangor Town Centre	£0.04	£0.35	£0.38		
	Elsewhere in Bangor	£1.33	£34.68	£36.01		
	Zone 3 - Elsewhere in Gwynedd	£0.31	£3.66	£3.97		
Zone 3	Total	£1.68	£38.68	£40.36		
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	£0.44	£2.97	£3.41		
Zone 4	Total	£0.44	£2.97	£3.41		
Out of Area	Elsewhere in Wales	£0.26	£1.69	£1.95		
	Chester City Centre	£0.01	£0.08	£0.09		
	Cheshire Oaks	£0.01	£0.11	£0.12		
	Elsewhere in Chester	£0.05	£0.24	£0.30		
	Liverpool City Centre	£0.01	£0.10	£0.12		
	Elsewhere in Liverpool	£0.02	£0.19	£0.21		
	Elsewhere in UK	£1.43	£7.72	£9.15		
Out of Area	Total	£1.79	£10.14	£11.94		
Total Expenditure		£39.83	£161.56	£201.39		

Notes

Calculated from Tables B5.1 & B4.4

TABLE B5.4: AVAILABLE CONVENIENCE SPEND 2034 (EXC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total	Total Convenience Spend (£m)
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)		
Available Convenience Spend 2034		£39.40	£158.35	£197.75		
Zone 1 - Holyhead	Holyhead Town Centre	£1.17	£0.16	£1.33	15.6%	£1.53
	Holyhead Retail Park	£6.55	£6.82	£13.37	24.2%	£16.60
	Penrhos Retail Park	£17.49	£16.71	£34.20	20.6%	£41.25
	Elsewhere in Holyhead Town	£7.30	£2.01	£9.31	13.0%	£10.53
	Trearddur Bay	£0.18	£0.04	£0.23	79.0%	£0.41
	Zone 1 - Elsewhere in Holyhead	£0.02	£0.01	£0.04	55.7%	£0.06
Zone 1	Total	£32.71	£25.76	£58.47		£70.37
Zone 2 - Rest of Anglesey	Llangefni Town Centre	£0.02	£1.14	£1.16	8.3%	£1.25
	Elsewhere in Llangefni	£0.66	£27.97	£28.62	12.5%	£32.21
	Amlwch Local Centre	£0.02	£0.28	£0.30	7.1%	£0.32
	Elsewhere in Amlwch	£0.01	£7.19	£7.20	11.1%	£8.00
	Beaumaris Local Centre	£0.00	£0.31	£0.31	51.5%	£0.46
	Elsewhere in Beaumaris	£0.04	£1.56	£1.60	36.9%	£2.19
	Benllech Local Centre	£0.01	£0.84	£0.84	18.0%	£1.00
	Elsewhere in Benllech	£0.01	£4.74	£4.75	41.6%	£6.73
	Llanfairpwll Local Centre	£0.02	£0.20	£0.22	29.0%	£0.28
	Elsewhere in Llanfairpwll	£0.02	£4.16	£4.18	16.8%	£4.89
	Menai Bridge Local Centre	£0.01	£0.52	£0.53	31.6%	£0.70
	Elsewhere in Menai Bridge	£0.24	£9.07	£9.31	39.1%	£12.95
	Valley Local Centre	£0.49	£1.38	£1.87	29.5%	£2.43
	Elsewhere in Valley	£0.00	£0.00	£0.00	0.0%	£0.00
	Cemaes Local Centre	£0.01	£0.57	£0.57	38.6%	£0.79
	Elsewhere in Cemaes	£0.00	£0.00	£0.00	63.6%	£0.00
	Gaerwen Local Centre	£0.01	£0.48	£0.49	11.7%	£0.55
	Rhosneigr Local Centre	£0.02	£0.30	£0.32	70.9%	£0.55
	Elsewhere in Rhosneigr	£0.00	£0.02	£0.02	55.0%	£0.04
	Zone 2 - Elsewhere In Anglesey	£1.23	£21.09	£22.33	17.8%	£26.30
Zone 2	Total	£2.82	£81.82	£84.64		£101.64
Zone 3 - Gwynedd	Bangor Town Centre	£0.03	£0.34	£0.37		
	Elsewhere in Bangor	£1.32	£33.99	£35.31		
	Zone 3 - Elsewhere in Gwynedd	£0.31	£3.59	£3.90		
Zone 3	Total	£1.66	£37.92	£39.58		
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	£0.43	£2.92	£3.35		
Zone 4	Total	£0.43	£2.92	£3.35		
Out of Area	Elsewhere in Wales	£0.26	£1.66	£1.91		
	Chester City Centre	£0.01	£0.08	£0.09		
	Cheshire Oaks	£0.01	£0.11	£0.12		
	Elsewhere in Chester	£0.05	£0.24	£0.29		
	Liverpool City Centre	£0.01	£0.10	£0.12		
	Elsewhere in Liverpool	£0.02	£0.19	£0.21		
	Elsewhere in UK	£1.41	£7.57	£8.98		
Out of Area	Total	£1.77	£9.94	£11.72		
Total Expenditure		£39.40	£158.35	£197.75		

Notes

Calculated from Tables B5.1 & B4.4

TABLE B5.5: AVAILABLE CONVENIENCE SPEND 2039 (EXC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total	Total Convenience Spend (£m)
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)		
Available Convenience Spend 2039		£39.28	£155.89	£195.17		
Zone 1 - Holyhead	Holyhead Town Centre	£1.16	£0.16	£1.32	15.6%	£1.53
	Holyhead Retail Park	£6.53	£6.71	£13.24	24.2%	£16.44
	Penrhos Retail Park	£17.44	£16.45	£33.89	20.6%	£40.87
	Elsewhere in Holyhead Town	£7.28	£1.98	£9.26	13.0%	£10.46
	Trearddur Bay	£0.18	£0.04	£0.23	79.0%	£0.40
	Zone 1 - Elsewhere in Holyhead	£0.02	£0.01	£0.04	55.7%	£0.06
Zone 1	Total	£32.61	£25.36	£57.97		£69.77
Zone 2 - Rest of Anglesey	Llangefni Town Centre	£0.02	£1.12	£1.14	8.3%	£1.24
	Elsewhere in Llangefni	£0.66	£27.53	£28.19	12.5%	£31.72
	Amlwch Local Centre	£0.02	£0.28	£0.30	7.1%	£0.32
	Elsewhere in Amlwch	£0.01	£7.08	£7.09	11.1%	£7.88
	Beaumaris Local Centre	£0.00	£0.30	£0.30	51.5%	£0.46
	Elsewhere in Beaumaris	£0.04	£1.54	£1.57	36.9%	£2.15
	Benllech Local Centre	£0.01	£0.83	£0.83	18.0%	£0.98
	Elsewhere in Benllech	£0.01	£4.67	£4.68	41.6%	£6.62
	Llanfairpwll Local Centre	£0.02	£0.19	£0.22	29.0%	£0.28
	Elsewhere in Llanfairpwll	£0.02	£4.10	£4.12	16.8%	£4.81
	Menai Bridge Local Centre	£0.01	£0.51	£0.52	31.6%	£0.69
	Elsewhere in Menai Bridge	£0.24	£8.93	£9.17	39.1%	£12.76
	Valley Local Centre	£0.49	£1.36	£1.85	29.5%	£2.40
	Elsewhere in Valley	£0.00	£0.00	£0.00	0.0%	£0.00
	Cemaes Local Centre	£0.01	£0.56	£0.56	38.6%	£0.78
	Elsewhere in Cemaes	£0.00	£0.00	£0.00	63.6%	£0.00
	Gaerwen Local Centre	£0.01	£0.47	£0.48	11.7%	£0.54
	Rhosneigr Local Centre	£0.02	£0.30	£0.32	70.9%	£0.54
	Elsewhere in Rhosneigr	£0.00	£0.02	£0.02	55.0%	£0.03
	Zone 2 - Elsewhere In Anglesey	£1.23	£20.76	£21.99	17.8%	£25.91
Zone 2	Total	£2.81	£80.55	£83.36		£100.10
Zone 3 - Gwynedd	Bangor Town Centre	£0.03	£0.33	£0.37		
	Elsewhere in Bangor	£1.31	£33.46	£34.77		
	Zone 3 - Elsewhere in Gwynedd	£0.31	£3.53	£3.84		
Zone 3	Total	£1.66	£37.33	£38.98		
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	£0.43	£2.87	£3.30		
Zone 4	Total	£0.43	£2.87	£3.30		
Out of Area	Elsewhere in Wales	£0.26	£1.63	£1.89		
	Chester City Centre	£0.01	£0.07	£0.08		
	Cheshire Oaks	£0.01	£0.11	£0.12		
	Elsewhere in Chester	£0.05	£0.23	£0.29		
	Liverpool City Centre	£0.01	£0.10	£0.12		
	Elsewhere in Liverpool	£0.02	£0.19	£0.21		
	Elsewhere in UK	£1.41	£7.45	£8.86		
Out of Area	Total	£1.77	£9.79	£11.56		
Total Expenditure		£39.28	£155.89	£195.17		

Notes

Calculated from Tables B5.1 & B4.4

TABLE B5.6: SUMMARY OF AVAILABLE CONVENIENCE SPEND 2025 - 2043 (EXC SFT)

SUPERMARKETS (CONVENIENCE) SPEND		2024	2029	2034	2039
Merchant Zone	Retail Location				
Zone 1 - Holyhead	Holyhead Town Centre	£1.60	£1.55	£1.53	£1.53
	Holyhead Retail Park	£17.39	£16.86	£16.60	£16.44
	Penrhos Retail Park	£43.20	£41.89	£41.25	£40.87
	Elsewhere in Holyhead Town	£10.99	£10.66	£10.53	£10.46
	Trearddur Bay	£0.42	£0.41	£0.41	£0.40
	Zone 1 - Elsewhere in Holyhead	£0.06	£0.06	£0.06	£0.06
Zone 1	Total	£73.67	£71.43	£70.37	£69.77
Zone 2 - Rest of Anglesey	Llangefni Town Centre	£1.32	£1.28	£1.25	£1.24
	Elsewhere in Llangefni	£33.92	£32.86	£32.21	£31.72
	Amlwch Local Centre	£0.34	£0.33	£0.32	£0.32
	Elsewhere in Amlwch	£8.43	£8.16	£8.00	£7.88
	Beaumaris Local Centre	£0.49	£0.47	£0.46	£0.46
	Elsewhere in Beaumaris	£2.30	£2.23	£2.19	£2.15
	Benllech Local Centre	£1.05	£1.02	£1.00	£0.98
	Elsewhere in Benllech	£7.08	£6.86	£6.73	£6.62
	Llanfairpwll Local Centre	£0.30	£0.29	£0.28	£0.28
	Elsewhere in Llanfairpwll	£5.15	£4.99	£4.89	£4.81
	Menai Bridge Local Centre	£0.73	£0.71	£0.70	£0.69
	Elsewhere in Menai Bridge	£13.64	£13.21	£12.95	£12.76
	Valley Local Centre	£2.55	£2.47	£2.43	£2.40
	Elsewhere in Valley	£0.00	£0.00	£0.00	£0.00
	Cemaes Local Centre	£0.84	£0.81	£0.79	£0.78
	Elsewhere in Cemaes	£0.00	£0.00	£0.00	£0.00
	Gaerwen Local Centre	£0.58	£0.56	£0.55	£0.54
	Rhosneigr Local Centre	£0.58	£0.56	£0.55	£0.54
	Elsewhere in Rhosneigr	£0.04	£0.04	£0.04	£0.03
	Zone 2 - Elsewhere In Anglesey	£27.68	£26.82	£26.30	£25.91
Zone 2	Total	£107.01	£103.66	£101.64	£100.10
Total Expenditure		£180.68	£175.10	£172.01	£169.87

TABLE B5.7: ISLE OF ANGLESEY - CONVENIENCE GOODS CAPACITY

		2024	2029	2035	2039
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£180.7	£175.1	£172.0	£169.9
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£180.7	£181.4	£182.3	£183.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£6.3	-£10.3	-£13.4
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)			Considered Separately	
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£6.3	-£10.3	-£13.4
STEP 6:	CAPACITY FOR CONVENIENCE FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,537	£12,600	£12,663
	(ii) Net Floorspace Capacity (sq m):	-	-503	-818	-1,055
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	
	(iv) Gross Floorspace Capacity (sq m):	-719	-1,168	-1,507	

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table B5.6).

STEP 2: It has been assumed for the purpose of this assessment that Dorset's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels) with future turnover levels uplifted to reflect expected productivity improvements

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2030.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEPS 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the average sales performance of supermarket operators (i.e. Tesco, Asda, Sainsbury's, and Morrisons), supermarket (e.g. Co-op, Waitrose, Marks & Spencer, etc) and limited assortment discount (LAD) operators (e.g. Aldi and Lidl).

APPENDIX B6: COMPARISON CAPACITY TABLES

TABLE B6.1: COMPARISON MARKET SHARES 2024 (EXC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)	
Zone 1 - Holyhead	Holyhead Town Centre	3.0%	0.2%	0.5%	19.0%
	Holyhead Retail Park	16.7%	3.8%	5.2%	17.7%
	Penrhos Retail Park	10.9%	2.2%	3.1%	20.3%
	Elsewhere in Holyhead Town	11.5%	1.1%	2.2%	18.2%
	Trearddur Bay	1.5%	0.1%	0.3%	45.3%
	Zone 1 - Elsewhere in Holyhead	0.9%	0.1%	0.2%	85.6%
Zone 1	Total	44.5%	7.5%	11.5%	25.7%
Zone 2 - Rest of Anglesey	Llangefni Town Centre	0.7%	1.0%	1.0%	22.2%
	Elsewhere in Llangefni	3.2%	13.6%	12.5%	12.6%
	Amlwch Local Centre	0.0%	0.6%	0.5%	8.6%
	Elsewhere in Amlwch	0.0%	1.0%	0.9%	8.5%
	Beaumaris Local Centre	0.1%	0.5%	0.5%	74.8%
	Elsewhere in Beaumaris	0.1%	0.6%	0.5%	70.1%
	Benllech Local Centre	0.0%	0.1%	0.1%	32.4%
	Elsewhere in Benllech	0.0%	0.5%	0.5%	23.7%
	Llanfairpwll Local Centre	1.2%	1.4%	1.4%	54.0%
	Elsewhere in Llanfairpwll	0.0%	0.7%	0.6%	24.3%
	Menai Bridge Local Centre	0.1%	0.7%	0.6%	47.6%
	Elsewhere in Menai Bridge	0.5%	0.8%	0.8%	43.7%
	Valley Local Centre	1.1%	0.6%	0.7%	6.4%
	Elsewhere in Valley	0.0%	0.0%	0.0%	18.0%
	Cemaes Local Centre	0.0%	0.1%	0.1%	45.5%
	Elsewhere in Cemaes	0.0%	0.1%	0.1%	9.4%
	Gaerwen Local Centre	0.5%	3.9%	3.5%	17.6%
	Rhosneigr Local Centre	0.2%	0.2%	0.2%	83.2%
	Elsewhere in Rhosneigr	0.1%	0.1%	0.1%	73.6%
	Zone 2 - Elsewhere In Anglesey	8.3%	8.9%	8.9%	26.7%
Zone 2	Total	16.2%	35.6%	33.5%	28.5%
Zone 3 - Gwynedd	Bangor Town Centre	1.9%	3.5%	3.3%	
	Elsewhere in Bangor	11.3%	20.0%	19.1%	
	Zone 3 - Elsewhere in Gwynedd	1.5%	5.0%	4.6%	
Zone 3	Total	14.7%	28.5%	27.0%	
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	7.5%	9.6%	9.4%	
Zone 4	Total	7.5%	9.6%	9.4%	
Out of Area	Elsewhere in Wales	1.3%	2.7%	2.6%	
	Chester City Centre	0.9%	0.9%	0.9%	
	Cheshire Oaks	1.1%	1.8%	1.7%	
	Elsewhere in Chester	0.5%	0.3%	0.3%	
	Liverpool City Centre	1.1%	1.4%	1.4%	
	Elsewhere in Liverpool	0.3%	0.5%	0.5%	
	Elsewhere in UK	11.8%	11.3%	11.3%	
Out of Area	Total	17.1%	18.9%	18.7%	
Online Expenditure					
Total Expenditure		100.0%	100.0%	100.0%	

Notes

Calculated from Table B3.2

TABLE B6.2: AVAILABLE COMPARISON SPEND 2024 (EXC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total	Total COMPARISON Spend (£m)
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)		
Available Comparison Spend 2024		£33.31	£140.80	£174.11		
Zone 1 - Holyhead	Holyhead Town Centre	£1.00	£0.27	£1.27	19.0%	£1.51
	Holyhead Retail Park	£5.55	£5.41	£10.95	17.7%	£12.90
	Penrhos Retail Park	£3.64	£3.06	£6.70	20.3%	£8.07
	Elsewhere in Holyhead Town	£3.82	£1.52	£5.35	18.2%	£6.32
	Trearddur Bay	£0.51	£0.14	£0.65	45.3%	£0.94
	Zone 1 - Elsewhere in Holyhead	£0.29	£0.18	£0.47	85.6%	£0.88
Zone 1	Total	£14.82	£10.58	£25.40		£30.61
Zone 2 - Rest of Anglesey	Llangefni Town Centre	£0.22	£1.41	£1.63	22.2%	£1.99
	Elsewhere in Llangefni	£1.06	£19.21	£20.28	12.6%	£22.83
	Amlwch Local Centre	£0.01	£0.85	£0.86	8.6%	£0.94
	Elsewhere in Amlwch	£0.00	£1.39	£1.39	8.5%	£1.51
	Beaumaris Local Centre	£0.04	£0.75	£0.79	74.8%	£1.39
	Elsewhere in Beaumaris	£0.04	£0.79	£0.83	70.1%	£1.42
	Benllech Local Centre	£0.00	£0.17	£0.17	32.4%	£0.22
	Elsewhere in Benllech	£0.00	£0.76	£0.76	23.7%	£0.94
	Llanfairpwll Local Centre	£0.39	£2.01	£2.40	54.0%	£3.69
	Elsewhere in Llanfairpwll	£0.01	£0.99	£1.01	24.3%	£1.25
	Menai Bridge Local Centre	£0.04	£0.98	£1.03	47.6%	£1.52
	Elsewhere in Menai Bridge	£0.15	£1.12	£1.27	43.7%	£1.82
	Valley Local Centre	£0.38	£0.85	£1.23	6.4%	£1.31
	Elsewhere in Valley	£0.00	£0.01	£0.01	18.0%	£0.01
	Cemaes Local Centre	£0.00	£0.10	£0.10	45.5%	£0.14
	Elsewhere in Cemaes	£0.00	£0.16	£0.16	9.4%	£0.18
	Gaerwen Local Centre	£0.18	£5.51	£5.69	17.6%	£6.69
	Rhosneigr Local Centre	£0.07	£0.21	£0.29	83.2%	£0.52
	Elsewhere in Rhosneigr	£0.03	£0.19	£0.23	73.6%	£0.39
	Zone 2 - Elsewhere In Anglesey	£2.75	£12.59	£15.34	26.7%	£19.44
Zone 2	Total	£5.40	£50.06	£55.46		£68.21
Zone 3 - Gwynedd	Bangor Town Centre	£0.62	£4.88	£5.49		
	Elsewhere in Bangor	£3.77	£28.18	£31.95		
	Zone 3 - Elsewhere in Gwynedd	£0.51	£7.04	£7.55		
Zone 3	Total	£4.90	£40.10	£45.00		
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	£2.51	£13.48	£15.99		
Zone 4	Total	£2.51	£13.48	£15.99		
Out of Area	Elsewhere in Wales	£0.45	£3.83	£4.28		
	Chester City Centre	£0.31	£1.26	£1.57		
	Cheshire Oaks	£0.37	£2.50	£2.87		
	Elsewhere in Chester	£0.16	£0.37	£0.52		
	Liverpool City Centre	£0.36	£2.02	£2.38		
	Elsewhere in Liverpool	£0.09	£0.75	£0.84		
	Elsewhere in UK	£3.94	£15.87	£19.81		
Out of Area	Total	£5.68	£26.58	£32.27		
Total Expenditure		£33.31	£140.80	£174.11		

Notes

Calculated from Tables B5.1 & B4.4

TABLE B6.3: AVAILABLE COMPARISON SPEND 2029 (EXC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total	Total COMPARISON Spend (£m)
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)		
Available Comparison Spend 2029		£34.80	£146.84	£181.64		
Zone 1 - Holyhead	Holyhead Town Centre	£1.04	£0.28	£1.33	19.0%	£1.58
	Holyhead Retail Park	£5.80	£5.64	£11.43	17.7%	£13.46
	Penrhos Retail Park	£3.81	£3.19	£7.00	20.3%	£8.42
	Elsewhere in Holyhead Town	£3.99	£1.59	£5.58	18.2%	£6.60
	Trearddur Bay	£0.54	£0.14	£0.68	45.3%	£0.98
	Zone 1 - Elsewhere in Holyhead	£0.30	£0.19	£0.49	85.6%	£0.91
Zone 1	Total	£15.48	£11.03	£26.51		£31.96
Zone 2 - Rest of Anglesey	Llangefni Town Centre	£0.23	£1.47	£1.70	22.2%	£2.08
	Elsewhere in Llangefni	£1.11	£20.04	£21.15	12.6%	£23.81
	Amlwch Local Centre	£0.01	£0.89	£0.90	8.6%	£0.98
	Elsewhere in Amlwch	£0.00	£1.45	£1.45	8.5%	£1.57
	Beaumaris Local Centre	£0.04	£0.78	£0.83	74.8%	£1.45
	Elsewhere in Beaumaris	£0.04	£0.82	£0.87	70.1%	£1.48
	Benllech Local Centre	£0.00	£0.17	£0.17	32.4%	£0.23
	Elsewhere in Benllech	£0.00	£0.79	£0.79	23.7%	£0.98
	Llanfairpwll Local Centre	£0.40	£2.10	£2.50	54.0%	£3.85
	Elsewhere in Llanfairpwll	£0.01	£1.04	£1.05	24.3%	£1.30
	Menai Bridge Local Centre	£0.05	£1.03	£1.07	47.6%	£1.58
	Elsewhere in Menai Bridge	£0.16	£1.16	£1.32	43.7%	£1.90
	Valley Local Centre	£0.40	£0.89	£1.29	6.4%	£1.37
	Elsewhere in Valley	£0.00	£0.01	£0.01	18.0%	£0.01
	Cemaes Local Centre	£0.00	£0.10	£0.10	45.5%	£0.15
	Elsewhere in Cemaes	£0.00	£0.17	£0.17	9.4%	£0.18
	Gaerwen Local Centre	£0.18	£5.75	£5.93	17.6%	£6.98
	Rhosneigr Local Centre	£0.07	£0.22	£0.30	83.2%	£0.55
	Elsewhere in Rhosneigr	£0.03	£0.20	£0.24	73.6%	£0.41
	Zone 2 - Elsewhere In Anglesey	£2.87	£13.13	£16.00	26.7%	£20.28
Zone 2	Total	£5.64	£52.20	£57.85		£71.15
Zone 3 - Gwynedd	Bangor Town Centre	£0.65	£5.08	£5.73		
	Elsewhere in Bangor	£3.94	£29.39	£33.33		
	Zone 3 - Elsewhere in Gwynedd	£0.53	£7.35	£7.88		
Zone 3	Total	£5.12	£41.82	£46.94		
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	£2.63	£14.06	£16.68		
Zone 4	Total	£2.63	£14.06	£16.68		
Out of Area	Elsewhere in Wales	£0.47	£3.99	£4.46		
	Chester City Centre	£0.33	£1.31	£1.63		
	Cheshire Oaks	£0.39	£2.60	£2.99		
	Elsewhere in Chester	£0.16	£0.38	£0.55		
	Liverpool City Centre	£0.37	£2.11	£2.48		
	Elsewhere in Liverpool	£0.09	£0.78	£0.87		
	Elsewhere in UK	£4.12	£16.55	£20.67		
Out of Area	Total	£5.93	£27.72	£33.66		
Total Expenditure		£34.80	£146.84	£181.64		

Notes

Calculated from Tables B5.1 & B4.4

TABLE B6.4: AVAILABLE COMPARISON SPEND 2034 (EXC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total	Total COMPARISON Spend (£m)
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)		
Available Comparison Spend 2034		£38.38	£160.47	£198.85		
Zone 1 - Holyhead	Holyhead Town Centre	£1.15	£0.31	£1.46	19.0%	£1.74
	Holyhead Retail Park	£6.39	£6.16	£12.55	17.7%	£14.78
	Penrhos Retail Park	£4.20	£3.49	£7.69	20.3%	£9.25
	Elsewhere in Holyhead Town	£4.40	£1.74	£6.14	18.2%	£7.26
	Trearddur Bay	£0.59	£0.16	£0.75	45.3%	£1.08
	Zone 1 - Elsewhere in Holyhead	£0.34	£0.21	£0.54	85.6%	£1.01
Zone 1	Total	£17.07	£12.06	£29.13		£35.11
Zone 2 - Rest of Anglesey	Llangefni Town Centre	£0.25	£1.61	£1.86	22.2%	£2.27
	Elsewhere in Llangefni	£1.23	£21.90	£23.12	12.6%	£26.03
	Amlwch Local Centre	£0.01	£0.97	£0.98	8.6%	£1.07
	Elsewhere in Amlwch	£0.00	£1.59	£1.59	8.5%	£1.72
	Beaumaris Local Centre	£0.05	£0.86	£0.91	74.8%	£1.58
	Elsewhere in Beaumaris	£0.05	£0.90	£0.95	70.1%	£1.61
	Benllech Local Centre	£0.00	£0.19	£0.19	32.4%	£0.25
	Elsewhere in Benllech	£0.00	£0.87	£0.87	23.7%	£1.07
	Llanfairpwll Local Centre	£0.45	£2.29	£2.74	54.0%	£4.21
	Elsewhere in Llanfairpwll	£0.02	£1.13	£1.15	24.3%	£1.43
	Menai Bridge Local Centre	£0.05	£1.12	£1.17	47.6%	£1.73
	Elsewhere in Menai Bridge	£0.18	£1.27	£1.45	43.7%	£2.08
	Valley Local Centre	£0.44	£0.97	£1.41	6.4%	£1.50
	Elsewhere in Valley	£0.00	£0.01	£0.01	18.0%	£0.01
	Cemaes Local Centre	£0.00	£0.11	£0.11	45.5%	£0.16
	Elsewhere in Cemaes	£0.00	£0.18	£0.18	9.4%	£0.20
	Gaerwen Local Centre	£0.20	£6.28	£6.49	17.6%	£7.63
	Rhosneigr Local Centre	£0.08	£0.24	£0.33	83.2%	£0.60
	Elsewhere in Rhosneigr	£0.04	£0.22	£0.26	73.6%	£0.45
	Zone 2 - Elsewhere In Anglesey	£3.17	£14.34	£17.51	26.7%	£22.20
Zone 2	Total	£6.23	£57.05	£63.27		£77.82
Zone 3 - Gwynedd	Bangor Town Centre	£0.71	£5.56	£6.27		
	Elsewhere in Bangor	£4.34	£32.12	£36.46		
	Zone 3 - Elsewhere in Gwynedd	£0.59	£8.03	£8.61		
Zone 3	Total	£5.64	£45.70	£51.34		
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	£2.90	£15.36	£18.26		
Zone 4	Total	£2.90	£15.36	£18.26		
Out of Area	Elsewhere in Wales	£0.52	£4.36	£4.88		
	Chester City Centre	£0.36	£1.43	£1.79		
	Cheshire Oaks	£0.43	£2.85	£3.27		
	Elsewhere in Chester	£0.18	£0.42	£0.60		
	Liverpool City Centre	£0.41	£2.31	£2.72		
	Elsewhere in Liverpool	£0.10	£0.85	£0.95		
	Elsewhere in UK	£4.54	£18.08	£22.63		
Out of Area	Total	£6.54	£30.30	£36.84		
Total Expenditure		£38.38	£160.47	£198.85		

Notes

Calculated from Tables B5.1 & B4.4

TABLE B6.5: AVAILABLE COMPARISON SPEND 2039 (EXC SFT)

Merchant location	Retail Location	Customer Location			% Inflow Total	Total COMPARISON Spend (£m)
		Zone 1 Holyhead	Zone 2 - Rest of Anglesey	Isle of Anglesey County (Zones 1 & 2)		
Available Comparison Spend 2039		£42.45	£175.25	£217.70		
Zone 1 - Holyhead	Holyhead Town Centre	£1.27	£0.34	£1.61	19.0%	£1.92
	Holyhead Retail Park	£7.07	£6.73	£13.80	17.7%	£16.24
	Penrhos Retail Park	£4.64	£3.81	£8.45	20.3%	£10.17
	Elsewhere in Holyhead Town	£4.87	£1.90	£6.77	18.2%	£8.00
	Trearddur Bay	£0.65	£0.17	£0.82	45.3%	£1.20
	Zone 1 - Elsewhere in Holyhead	£0.37	£0.22	£0.60	85.6%	£1.11
Zone 1	Total	£18.88	£13.17	£32.05		£38.63
Zone 2 - Rest of Anglesey	Llangefni Town Centre	£0.28	£1.75	£2.03	22.2%	£2.49
	Elsewhere in Llangefni	£1.36	£23.92	£25.27	12.6%	£28.45
	Amlwch Local Centre	£0.02	£1.06	£1.07	8.6%	£1.17
	Elsewhere in Amlwch	£0.00	£1.73	£1.73	8.5%	£1.88
	Beaumaris Local Centre	£0.05	£0.93	£0.99	74.8%	£1.73
	Elsewhere in Beaumaris	£0.05	£0.98	£1.04	70.1%	£1.76
	Benllech Local Centre	£0.00	£0.21	£0.21	32.4%	£0.28
	Elsewhere in Benllech	£0.00	£0.95	£0.95	23.7%	£1.17
	Llanfairpwll Local Centre	£0.49	£2.50	£3.00	54.0%	£4.61
	Elsewhere in Llanfairpwll	£0.02	£1.24	£1.25	24.3%	£1.56
	Menai Bridge Local Centre	£0.06	£1.22	£1.28	47.6%	£1.89
	Elsewhere in Menai Bridge	£0.20	£1.39	£1.59	43.7%	£2.28
	Valley Local Centre	£0.49	£1.06	£1.55	6.4%	£1.65
	Elsewhere in Valley	£0.01	£0.01	£0.01	18.0%	£0.02
	Cemaes Local Centre	£0.00	£0.12	£0.12	45.5%	£0.18
	Elsewhere in Cemaes	£0.00	£0.20	£0.20	9.4%	£0.22
	Gaerwen Local Centre	£0.22	£6.86	£7.09	17.6%	£8.33
	Rhosneigr Local Centre	£0.09	£0.27	£0.36	83.2%	£0.66
	Elsewhere in Rhosneigr	£0.04	£0.24	£0.28	73.6%	£0.49
	Zone 2 - Elsewhere In Anglesey	£3.51	£15.67	£19.17	26.7%	£24.30
Zone 2	Total	£6.89	£62.31	£69.19		£85.10
Zone 3 - Gwynedd	Bangor Town Centre	£0.79	£6.07	£6.86		
	Elsewhere in Bangor	£4.80	£35.08	£39.88		
	Zone 3 - Elsewhere in Gwynedd	£0.65	£8.77	£9.42		
Zone 3	Total	£6.24	£49.91	£56.15		
Zone 4 - Conwy	Zone 4 - Anywhere in Conwy	£3.20	£16.78	£19.98		
Zone 4	Total	£3.20	£16.78	£19.98		
Out of Area	Elsewhere in Wales	£0.57	£4.77	£5.34		
	Chester City Centre	£0.40	£1.56	£1.96		
	Cheshire Oaks	£0.47	£3.11	£3.58		
	Elsewhere in Chester	£0.20	£0.46	£0.66		
	Liverpool City Centre	£0.45	£2.52	£2.97		
	Elsewhere in Liverpool	£0.11	£0.93	£1.04		
	Elsewhere in UK	£5.03	£19.75	£24.78		
Out of Area	Total	£7.24	£33.09	£40.33		
Total Expenditure		£42.45	£175.25	£217.70		

Notes

Calculated from Tables B5.1 & B4.4

TABLE B6.6: SUMMARY OF AVAILABLE COMPARISON SPEND 2024 - 2039 (EXC SFT)

SUPERMARKETS (COMPARISON) SPEND		2024	2029	2034	2039
Merchant Zone		Retail Location			
Zone 1 - Holyhead	Holyhead Town Centre	£1.51	£1.58	£1.74	£1.92
	Holyhead Retail Park	£12.90	£13.46	£14.78	£16.24
	Penrhos Retail Park	£8.07	£8.42	£9.25	£10.17
	Elsewhere in Holyhead Town	£6.32	£6.60	£7.26	£8.00
	Trearddur Bay	£0.94	£0.98	£1.08	£1.20
	Zone 1 - Elsewhere in Holyhead	£0.88	£0.91	£1.01	£1.11
Zone 1	Total	£30.61	£31.96	£35.11	£38.63
Zone 2 - Rest of Anglesey	Llangefni Town Centre	£1.99	£2.08	£2.27	£2.49
	Elsewhere in Llangefni	£22.83	£23.81	£26.03	£28.45
	Amlwch Local Centre	£0.94	£0.98	£1.07	£1.17
	Elsewhere in Amlwch	£1.51	£1.57	£1.72	£1.88
	Beaumaris Local Centre	£1.39	£1.45	£1.58	£1.73
	Elsewhere in Beaumaris	£1.42	£1.48	£1.61	£1.76
	Benllech Local Centre	£0.22	£0.23	£0.25	£0.28
	Elsewhere in Benllech	£0.94	£0.98	£1.07	£1.17
	Llanfairpwll Local Centre	£3.69	£3.85	£4.21	£4.61
	Elsewhere in Llanfairpwll	£1.25	£1.30	£1.43	£1.56
	Menai Bridge Local Centre	£1.52	£1.58	£1.73	£1.89
	Elsewhere in Menai Bridge	£1.82	£1.90	£2.08	£2.28
	Valley Local Centre	£1.31	£1.37	£1.50	£1.65
	Elsewhere in Valley	£0.01	£0.01	£0.01	£0.02
	Cemaes Local Centre	£0.14	£0.15	£0.16	£0.18
	Elsewhere in Cemaes	£0.18	£0.18	£0.20	£0.22
	Gaerwen Local Centre	£6.69	£6.98	£7.63	£8.33
	Rhosneigr Local Centre	£0.52	£0.55	£0.60	£0.66
	Elsewhere in Rhosneigr	£0.39	£0.41	£0.45	£0.49
	Zone 2 - Elsewhere In Anglesey	£19.44	£20.28	£22.20	£24.30
Zone 2	Total	£68.21	£71.15	£77.82	£85.10
Total Expenditure		£98.82	£103.11	£112.94	£123.74

TABLE B6.7: ISLE OF ANGLESEY - COMPARISON GOODS CAPACITY

		2024	2029	2035	2039
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£98.8	£103.1	£112.9	£123.7
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£98.8	£108.8	£123.1	£139.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£5.7	-£10.1	-£15.5
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)			Considered Separately	
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£5.7	-£10.1	-£15.5
STEP 6:	CAPACITY FOR COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,604	£7,472	£8,454
	(ii) Net Floorspace Capacity (sq m):	-	-858	-1,356	-1,834
	(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
	(iv) Gross Floorspace Capacity (sq m):		-1,073	-1,695	-2,292

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table B6.6).

STEP 2: It has been assumed for the purpose of this assessment that Isle of Anglesey's comparison retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels) with future turnover levels uplifted to reflect expected productivity improvements

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2030.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEPS 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the average sales performance for comparison operators

Isle of Anglesey Retail Study

Appendix C - Health Checks

Prepared for:

Isle of Anglesey County Council

December 2025

lsh.co.uk



This document has been prepared and checked in accordance with the Lambert Smith Hampton Quality Assurance procedures and authorised for release. If not signed off by a Director in the Planning, Regeneration + Infrastructure (PR+I) division at LSH then this document should be treated as a draft, and as being Private and Confidential. It should not be for wider distribution without the sign-off and permission of Lambert Smith Hampton.

This report meets the PDF/UA (Universal Accessibility) standard, which is equivalent to the WCAG 'AA' digital standard.

Prepared by:

Callum Clements

Signed:

For and on behalf of Lambert Smith Hampton

Issued: December 2025

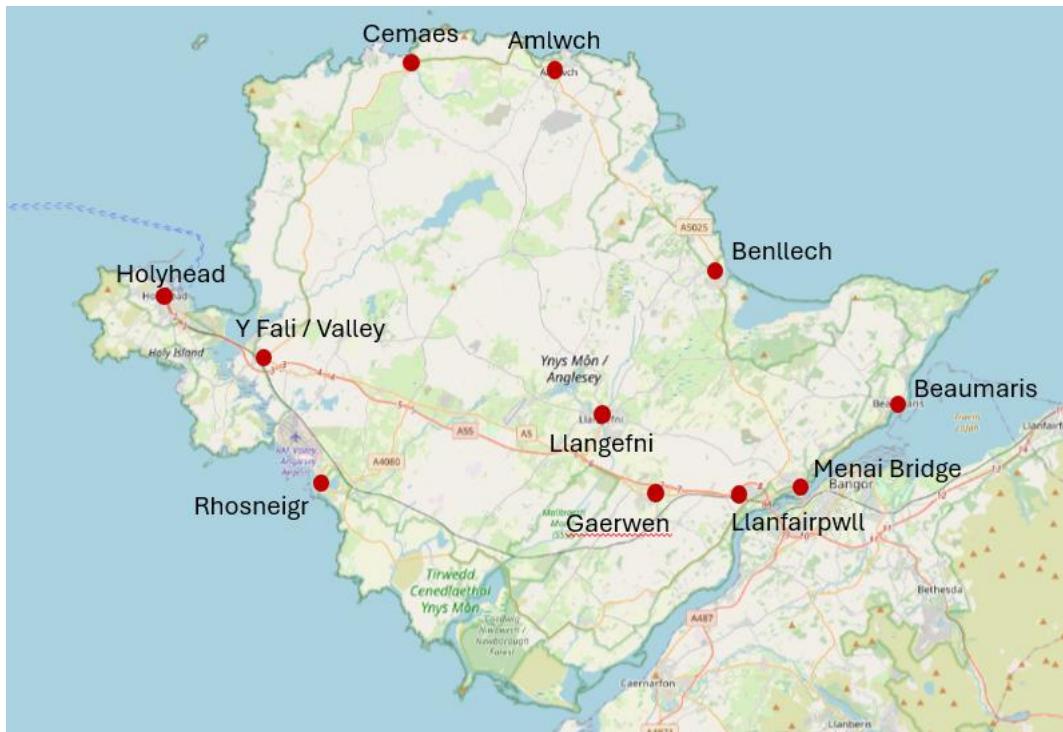
Contents

1. Introduction.....	4
2. Holyhead Town Centre.....	6
3. Llangefni Town Centre	11
4. Amlwch Local Centre.....	16
5. Beaumaris Local Centre	20
6. Benllech Local Centre	23
7. Cemaes Local Centre.....	25
8. Llanfairpwll Local Centre	28
9. Menai Bridge Local Centre	32
10. Rhosneigr Local Centre	35
11. Valley Local Centre	37
12. Gaerwen.....	40
13. Penrhos Retail Park.....	41

1. Introduction

1. This Appendix report provides information on the health of the ten Urban and Local Retail Centres in Anglesey, along with a health check for Gaerwen. The location of these centres is shown below:

Figure 1: Urban and Local Retail Centres in Anglesey



2. The health checks consider:

- Diversity of Uses
- Vacancies
- Footfall

3. The **Diversity of Uses** is informed by survey data provided by Experian Goad and surveys conducted by LSH in September 2025. It examines the current number of outlets and quantum of floorspace for each commercial category, namely:

- Convenience Retail (food and non-alcoholic drinks, tobacco, alcohol, newspapers and 90% of non-durable household goods);
- Comparison Retail (all other retail goods);
- Retail Services (including health and beauty services such as beauty salons, tattoo parlours etc, post offices, dry cleaners & laundrettes, travel agents, photo processing outlets & studios, and other personal services);
- Leisure Services (including food and drink outlets, games of chance venues such as bingo halls, gambling arcades, and betting shops, sports and leisure facilities, night clubs, cinemas, theatres, concert halls and hotel/guesthouse accommodation);
- Financial & Business Services (including banks, building societies, employment and career services, legal and property services); and
- Other uses.

4. **Vacancy** levels are also informed by the Diversity of Uses studies. Analysis of their location and size of unit can indicate whether the vacancies are an indicator of over-supply or reflect natural churn in space. The length of time that a unit has been vacant may also be relevant but is not shown from the health checks.
5. **Pedestrian Flow** data has been obtained from MSCI Property Intel (MSCI) who harvest data from over 10 million mobile devices. All data is fully anonymised and GDPR compliant. Data is collected daily.
6. The data presented here comprises:
 - Heat maps showing footfall in February and August 2024. This indicates the areas of greatest use and activity with green indicating lower levels and orange/red higher levels of footfall; and
 - Graphs showing monthly footfall for a specific point in the centre over the period April 2019 to December 2024. This allows long-term trends and seasonal variations to be seen.

2. Holyhead Town Centre

Town Centre Boundary

7. The figure below sets out Holyhead's defined town centre boundary.

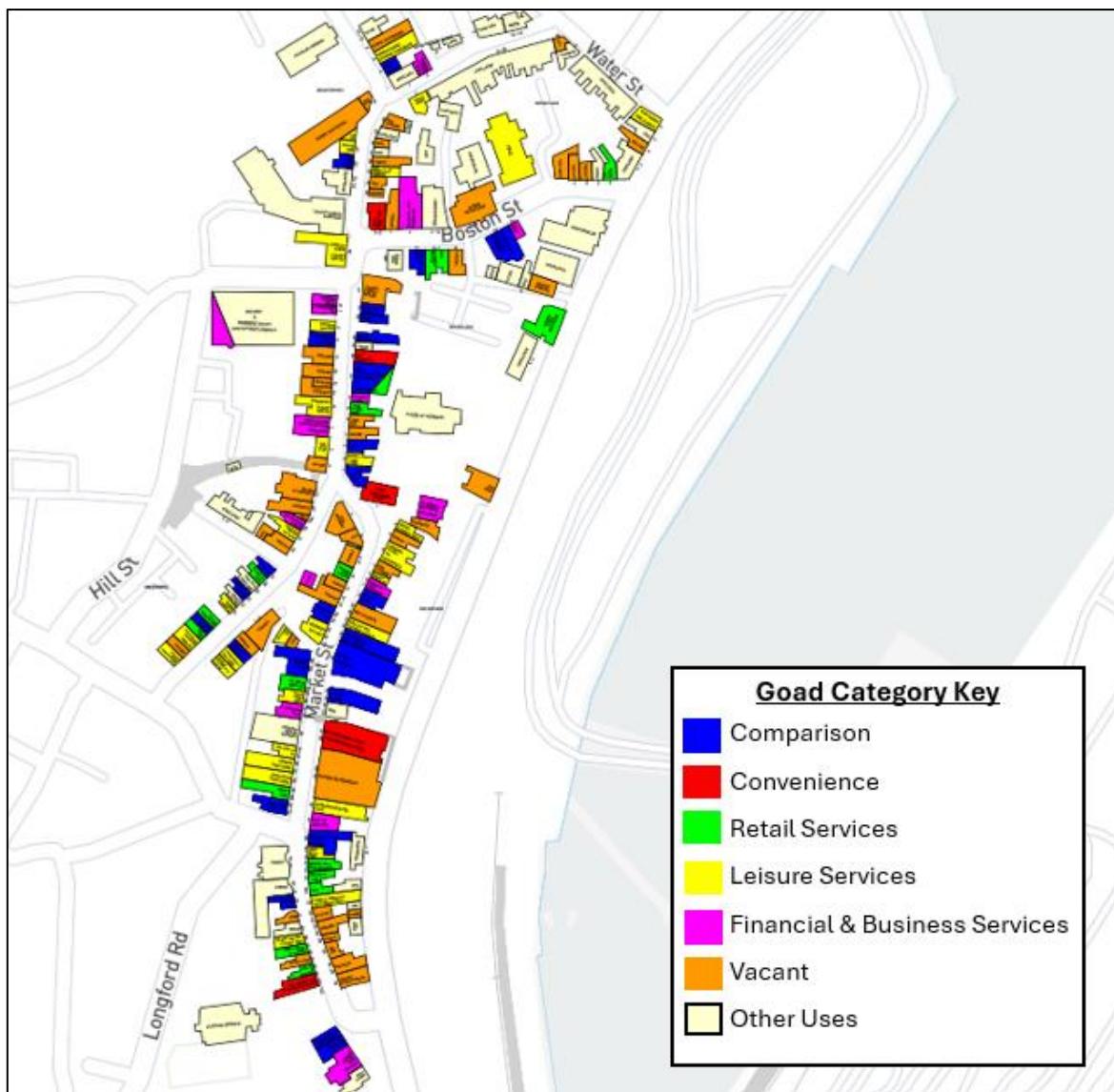
Figure 2: Holyhead Town Centre Boundary



Diversity of Uses

8. Goad data from December 2024 has been used to assess Holyhead's mix of uses. The figure below shows the area covered by Goad and the uses found within the centre.

Figure 3: Holyhead Diversity of Uses Map



Source: Experian Goad, December 2024

9. The table below outlines Holyhead's diversity of uses based on outlets and provides a comparison to Goad's UK averages.

Figure 4: Holyhead Diversity of Uses - Outlets

	No. of Outlets	% of Total Outlets		
		Holyhead	UK Average	Difference
Comparison Retail	26	17.6%	26.4%	-8.8%
Convenience Retail	5	3.4%	9.3%	-5.9%
Retail Services	16	10.8%	15.9%	-5.1%
Leisure Services	32	21.6%	25.8%	-4.2%
Financial & Business Services	15	10.1%	8.3%	+1.8%
Vacant	54	36.5%	14.1%	+22.4%
Total	148	100.0%	100.0%	

Source: Experian Goad, December 2024

10. The table below outlines Holyhead's diversity of uses based on floorspace and provides a comparison to Goad's UK averages.

Figure 5: Holyhead Diversity of Uses - Floorspace

	Gross Floorspace (sqm)	% of Total Floorspace		
		Holyhead	UK Average	Difference
Comparison Retail	2,923	18.5%	29.4%	-10.9%
Convenience Retail	947	6.0%	15.6%	-9.6%
Retail Services	1,313	8.3%	7.3%	+1.0%
Leisure Services	3,370	21.4%	26.7%	-5.3%
Financial & Business Services	1,523	9.7%	6.3%	+3.4%
Vacant	5,697	36.1%	14.2%	+21.9%
Total	15,774	100.0%	100.0%	

Source: Experian Goad, December 2024

11. The comparison retail offer in the town centre is relatively limited with few national multiples but a correspondingly strong independent offer. Key occupiers include national multiples such as Boots (chemist) and RSPCA (charity shops), whilst independents include Clares (shoes and accessories) and Bargains Galore (hardware and household goods).

12. The convenience retail offer is also limited, with the Co-op on Market Street providing the main offer, supported by a Premier convenience store and three independent traders.

13. The retail services offer is dominated by health & beauty operators (12 of 16), including hairdressers, barbers and beauty salons. Other occupiers include the Post Office and an optician.

14. The financial services offer appears to be closer to the national average but Santander is the only operating high street bank (as of December 2024) and its closure has since been announced (March 2025). No date for this has yet been set for this and will not be until a replacement banking hub can be provided. Other financial and business services include a building society branch (Principality), estate agents, solicitors and accountants.

15. The table below outlines the mix of food and beverage operator types within Holyhead. This shows a high proportion of fast food outlets and takeaways and an above average proportion of public houses. However, provision of cafes, bars and restaurants is low.

Figure 6: Holyhead Diversity of Uses, Food & Beverage Operators

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Holyhead	UK Average		Holyhead	UK Average
Bars & Wine Bars	1	0.7%	2.3%	137	0.9%	2.4%
Cafes	3	2.0%	5.1%	304	1.9%	2.9%
Fast Food & Take-Away	15	10.1%	6.1%	1,265	8.0%	3.1%
Public Houses	5	3.4%	2.6%	672	4.3%	3.4%
Restaurants	4	2.7%	5.1%	261	1.7%	4.3%
Total	28	18.9%	21.2%	2,639	16.7%	16.1%

Source: Experian Goad, December 2024

Vacancies

16. There was a total of 54 vacant outlets in Holyhead in December 2024 (Goad) which represents 36.5% of the overall outlets, significantly higher than the UK average of 14.1%. The vacancy rate for floorspace is similarly high at 36.1%, which also compares unfavourably to the UK average of 14.2%.
17. However, these figures included the former cinema unit at the north end of Stanley Street which is outside of the defined town centre and has now re-opened. There is also significant redevelopment happening at the former HSBC building, which is being refurbished with plans for a restaurant and overnight accommodation.

Figure 7: Former HSBC Unit Refurbishment



Source: LSH Site Visit

Recent Changes in the Centre (December 2024 to September 2025)

18. Since December 2024 there have been a number of changes in the centre, including the following which were noted on an LSH site visit in September 2025:
 - Empire Cinema has re-opened following refurbishment;
 - The former Chocolate Box/ Post Office unit is now a Family Shopper convenience store which houses the Post Office service;
 - The vacant 26 Stanley Street unit (former NatWest) unit has now opened as Cybi Sports Bar;
 - Feast Brothers (Italian restaurant offering takeaway) has opened on Market Street;
 - Rowlands Pharmacy has relocated from 62 Market Street to 15-17 Market Street – 62 Market Street is now vacant; and
 - Where Goad indicates a row of vacant units to the east side of Market Street, close to the A5154, a series of these units have long been demolished.

Footfall

19. The figure below illustrates the pedestrian flows for Holyhead in the form of a heat map showing total pedestrian movements for February 2024 and August 2024. Footfall levels are strongest along Market Street, and at the junction of Summer Hill, Williams Street and Thomas Street, and close to the Cambria Street car park.
20. Footfall levels during February 2024 and August 2024 remain consistent, with monthly levels closely mirroring each other.

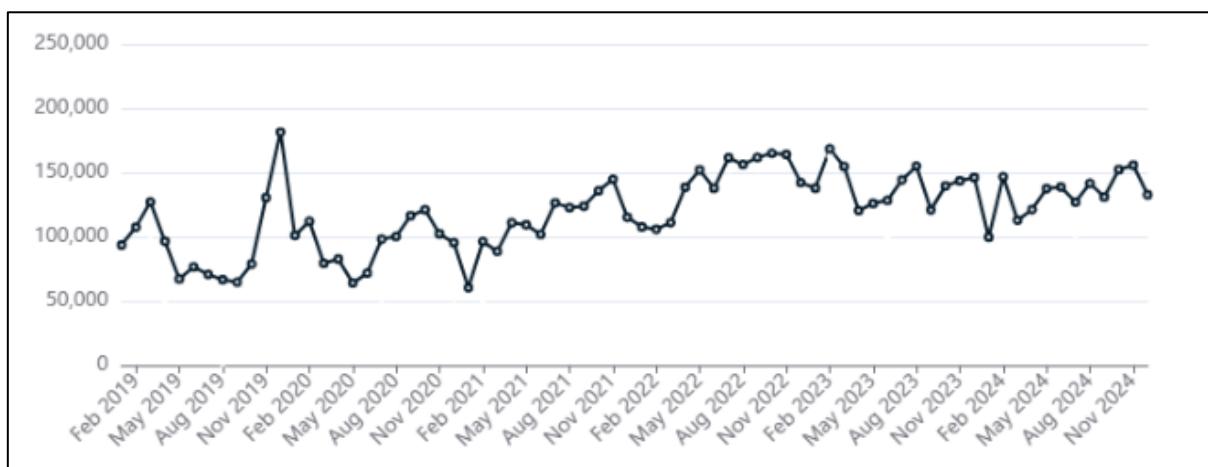
Figure 8: Holyhead Footfall Heat Map, February 2024 vs August 2024



Source: Datscha

21. A central section along Market Street, near the Co-op foodstore, has been sampled to assess footfall trends over the recent years.
22. The figure below shows how footfall levels have changed between January 2019 and December 2024 at Market Street. As can be seen, pedestrian activity has generally increased since 2019, however it has not surpassed the peak of 180,000 recorded in December 2019. Footfall gradually rose throughout 2021, and by 2024, it has consistently ranged between 100,000 and 150,000, indicating a stabilisation in monthly movements.

Figure 9: Holyhead Footfall Graph, January 2019 – December 2024



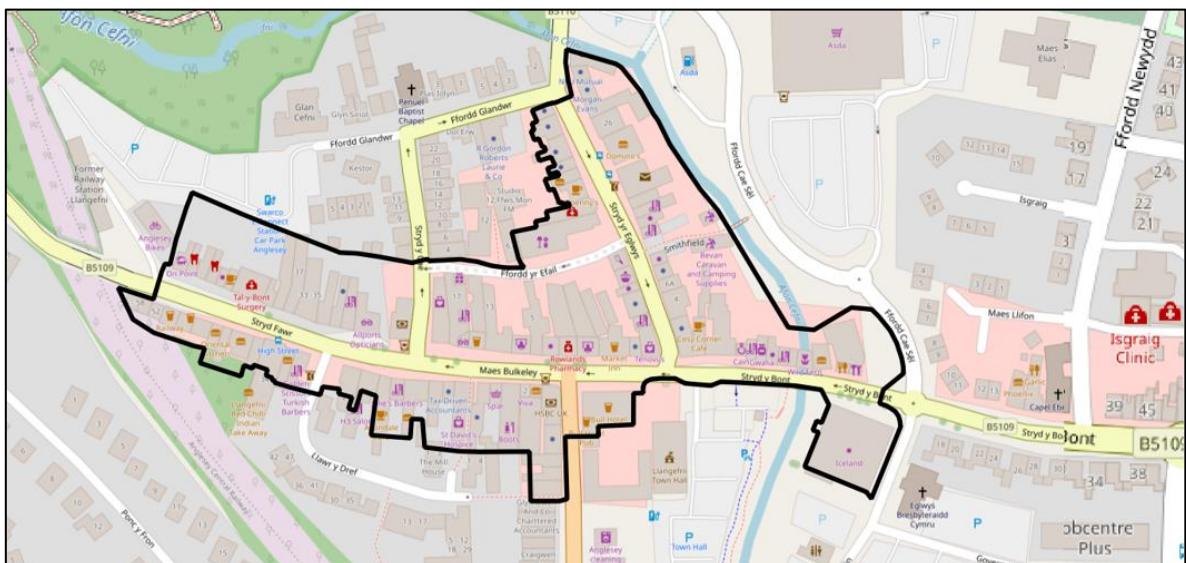
Source: Datscha

3. Llangefni Town Centre

Town Centre Boundary

23. The below figure sets out the defined centre boundary for Llangefni.

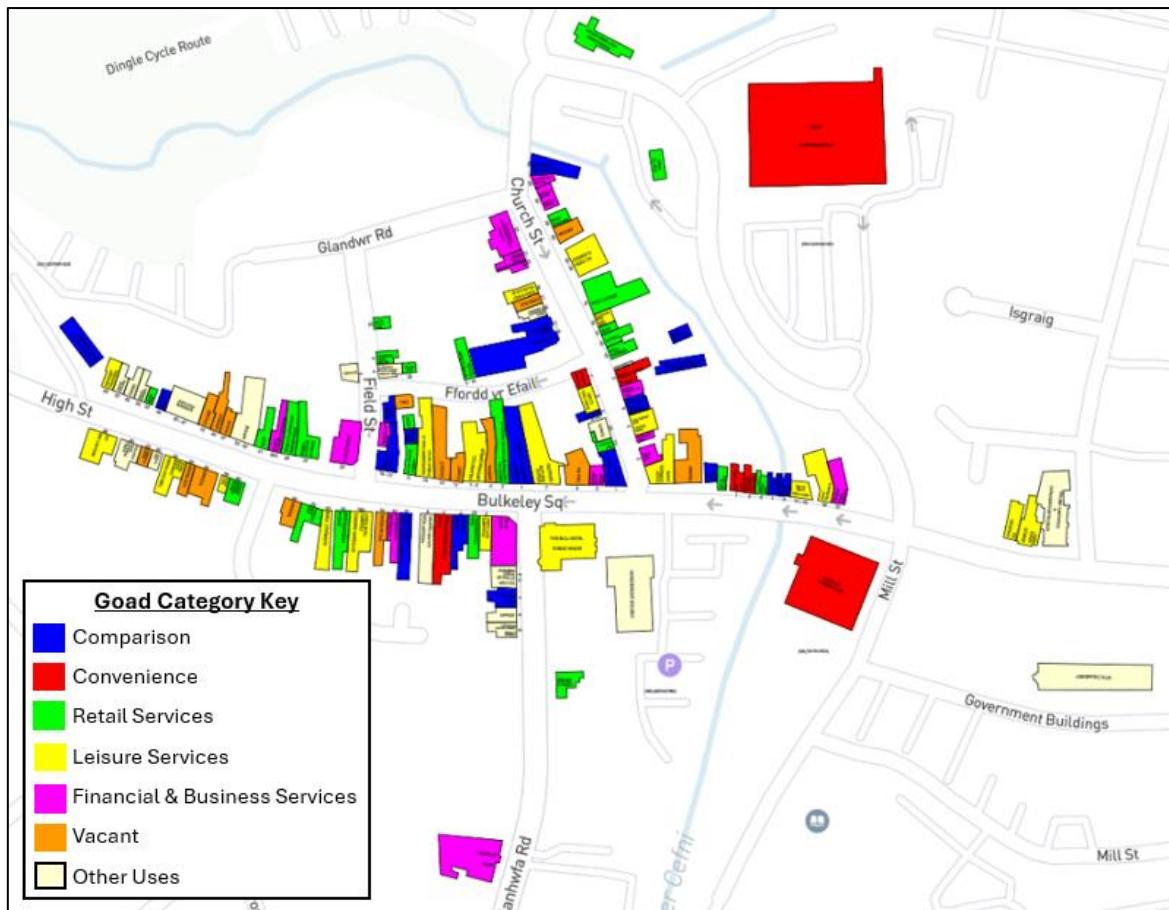
Figure 10: Llangefni Town Centre Boundary



Diversity of Uses

24. Goad data from October 2024 has been used to assess Llangefni's mix of uses. The figure below shows the area covered by Goad and the uses found within the centre.

Figure 11: Llangefni Diversity of Uses Map



Source: Experian Goad, October 2024

25. The table below outlines Llangefni's diversity of uses based on outlets and provides a comparison to Goad's UK averages.

Figure 12: Llangefni Diversity of Uses, Outlets

	No. of Outlets	% of Total Outlets		
		Llangefni	UK Average	Difference
Comparison Retail	20	18.9%	26.4%	-7.5%
Convenience Retail	7	6.6%	9.3%	-2.7%
Retail Services	26	24.5%	15.9%	+8.6%
Leisure Services	21	19.8%	25.8%	-6.0%
Financial & Business Services	16	15.1%	8.3%	+6.8%
Vacant	16	15.1%	14.1%	+1.0%
Total	106	100.0%	100.0%	

Source: Experian Goad, October 2024

26. The table below outlines Llangefni's diversity of uses based on floorspace and provides a comparison to Goad's UK averages.

Figure 13: Llangefni Diversity of Uses, Floorspace

	Gross Floorspace (sqm)	% of Total Floorspace		
		Llangefni	UK Average	Difference
Comparison Retail	2,081	14.8%	29.4%	-14.6%
Convenience Retail	3,832	27.2%	15.6%	+11.6%
Retail Services	2,106	15.0%	7.3%	+7.7%
Leisure Services	2,909	20.7%	26.7%	-6.0%
Financial & Business Services	1,660	11.8%	6.3%	+5.5%
Vacant	1,481	10.5%	14.2%	-3.7%
Total	14,068	100.0%	100.0%	

Source: Experian Goad, October 2024

27. The comparison retail offer in the town centre is relatively limited and is provided primarily by independent retailers. National multiples operating the town are limited to Boots (chemist), a pharmacy and charity shops. Key independents include DC Williams & Son (furniture) and Anglesey Bikes.
28. The convenience retail offer is largely provided by Asda, although the store does not sit within the defined town centre. Other convenience operators include Iceland and SPAR and a small number of independents.
29. The retail service provision in the centre is strong and is dominated by health & beauty uses which occupy 20 of the 26 outlets. Other uses include two opticians, a launderette and a Post Office.
30. The financial and business service offer was also above average in October 2024, and included three high street banks (HSBC, Lloyds and NatWest), although NatWest has since closed. The centre also has a building society (Principality) and a number of estate agents and solicitors.
31. The table below outlines the mix of food and beverage operator types within Llangefni. Overall provision is close to the UK average but the centre has an above average proportion of fast food & takeaway outlets and below average restaurant provision.

Figure 14: Llangefni Diversity of Uses, Food and Beverage Operators

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Llangefni	UK Average		Llangefni	UK Average
Bars & Wine Bars	0	0.0%	2.3%	0	0.0%	2.4%
Cafes	3	2.8%	5.1%	370	2.6%	2.9%
Fast Food & Take-Away	11	10.4%	6.1%	1,087	7.7%	3.1%
Public Houses	3	2.8%	2.6%	734	5.2%	3.4%
Restaurants	1	0.9%	5.1%	137	1.0%	4.3%
Total	18	17.0%	21.2%	2,328	16.5%	16.1%

Source: Experian Goad, October 2024

Vacancies

32. There was a total of 16 vacant outlets in Llangefni town centre in October 2024 which represents 15.1% of the overall and 10.5% of floorspace. This is similar to the UK average, although the floorspace is slightly lower than the 14.2% average.

33. Vacancies are distributed throughout the centre, but there appears to be a concentration of smaller units at the western end of the centre on High Street.

Recent Changes in the Centre (October 2024 to September 2025)

34. Since October 2024 there have been a number of changes in the centre, including the following which were noted on an LSH site visit in September 2025:

- NatWest has closed;
- William Hill (7-9 High Street) has closed; and
- The former Market Vaults pub, logged as vacant by Goad, has opened as Market Inn pub – the pub opened in March 2025 after a year-long refurbishment.

Figure 15: Market Inn Pub



Source: LSH Site Visit

Footfall

35. The figure below illustrates the pedestrian flows for Llangefni in the form of a heat map showing total pedestrian movements for February 2024 and August 2024. As can be seen, footfall levels are highest along High Street and Llawr Y Dref. Footfall is also higher near the Home Bargains (outside of the town centre) and around the main car park.

36. Monthly footfall appears to be fairly consistent throughout the year, with no major differences noted between February 2024 and August 2024, based on the footfall categories used by Datscha. However, a more detailed review of the data does indicate a small increase in footfall during the summer months.

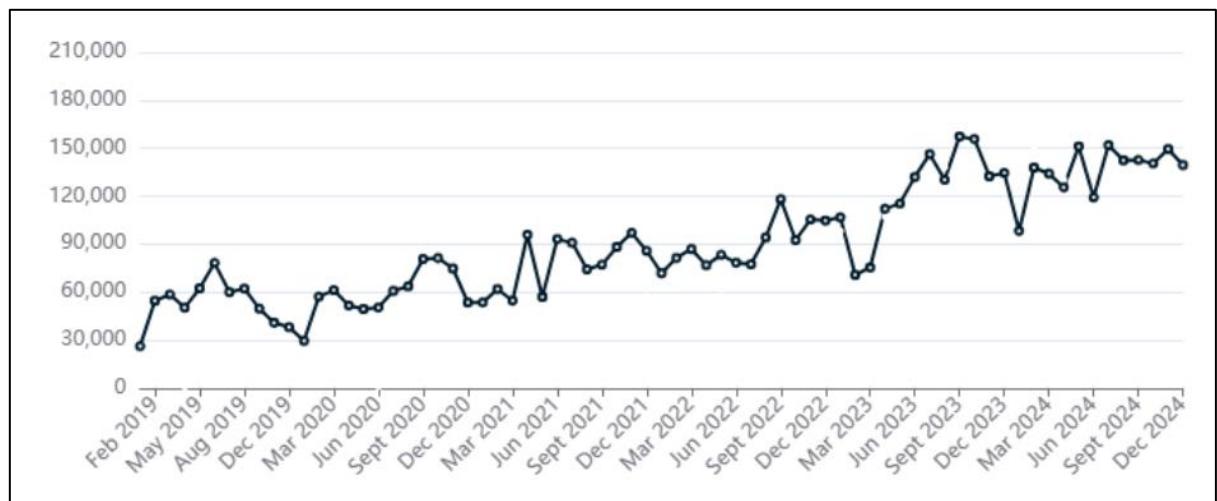
Figure 16: Llangefni Footfall Heat Map, February 2024 vs August 2024



Source: Datscha

37. A central point along Llangefni, near Boots Pharmacy, has been sampled to assess footfall trends over the recent years.
38. The figure below shows how footfall levels have changed between February 2019 and December 2024. As can be seen, footfall has been gradually increasing since 2019, when footfall was regularly between 30,000 and 60,000 per month. In 2024, footfall ranged between 100,000 and 150,000, with peak figures of 150,000 recorded both in May and July.

Figure 17: Llangefni Footfall Graph, January 2019 – December 2024



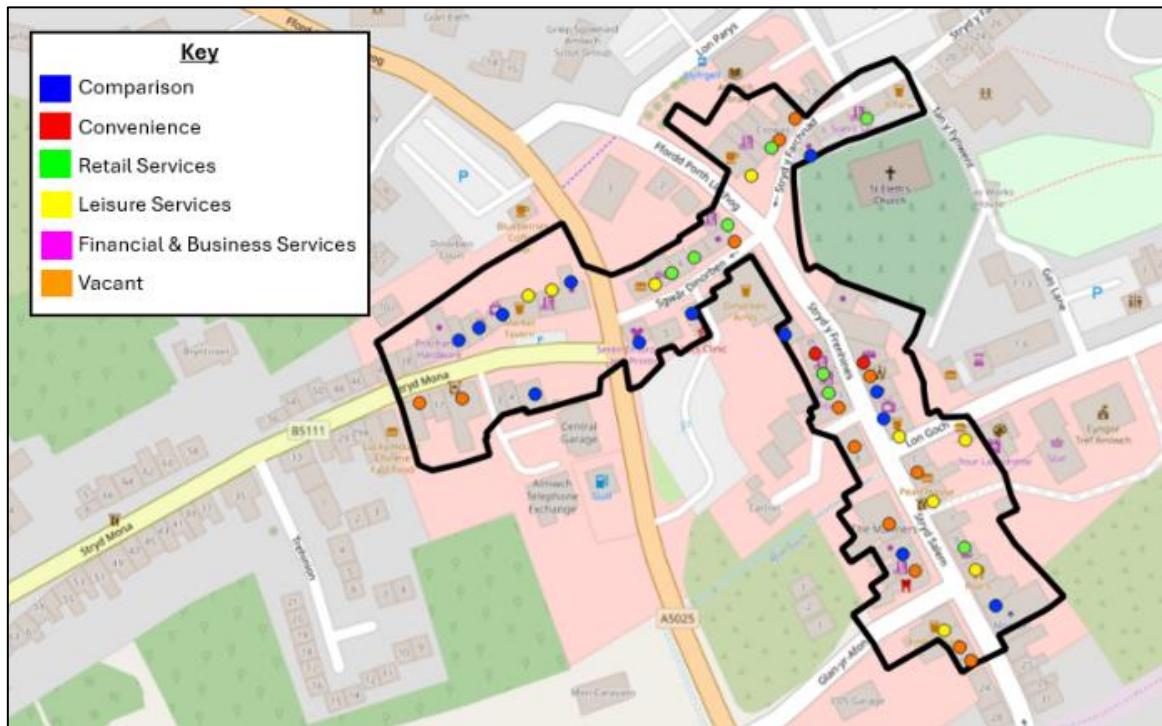
Source: Datscha

4. Amlwch Local Centre

Diversity of Uses

39. A LSH site visit was conducted in September 2025 to establish the mix of uses within Amlwch Local Centre.

Figure 18: Amlwch Diversity of Uses Map



40. The table below outlines Amlwch's diversity of uses based on outlets and provides a comparison to Goad's UK averages.

Figure 19: Amlwch Diversity of Uses

	No. of Outlets	% of Total Outlets		
		Amlwch	UK Average	Difference
Comparison Retail	13	28.9%	26.4%	+2.5%
Convenience Retail	2	4.4%	9.3%	-4.9%
Retail Services	9	20.0%	15.9%	+4.1%
Leisure Services	8	17.8%	25.8%	-8.0%
Financial & Business Services	0	0.0%	8.3%	-8.3%
Vacant	13	28.9%	14.1%	+14.8%
Total	45	100.0%	100.0%	

Source: LSH Site Visit, September 2025

41. Comparison retail is the dominant use within the centre, with the offer made up of charity shops, electrical goods, homeware, hardware and vehicle accessory shops.

42. The convenience retail offer is limited, with only a bakery and butchers available within the defined centre. The Co-op and SPAR which are likely to provide the main convenience offer are located outside of the centre boundary, to the east.

43. Retail services are predominantly health & beauty related (barbers, hairdressers, tanning etc.), making up eight of the nine outlets. The other retail service is the Alton Murphy opticians.
44. Leisure services in Amlwch are all food & beverage operators, with one café, one restaurant, three pubs and three fast food and take-away outlets. However, there is a further hotel/public house centrally located but outside of the defined centre (Dinorben Arms).

Vacancies

45. There is a total of 13 vacant outlets in Amlwch which represents 28.9% of the overall outlets, significantly higher than the UK average of 14.1%. These units include the former Post Office, the former Mariners pub and the former NatWest bank on Mona Street (see image below).

Figure 20: Former NatWest Bank Unit



Source: LSH Site Visit

Footfall

46. The figure below illustrates the pedestrian flows for Amlwch in the form of a heat map showing total pedestrian movements for February 2024 and August 2024. As can be seen, footfall levels are highest along Lon Goch, outside of the defined centre and around the junction of Parrys Street, Bull Bay Road, and Queen Street and these increase during the summer period.

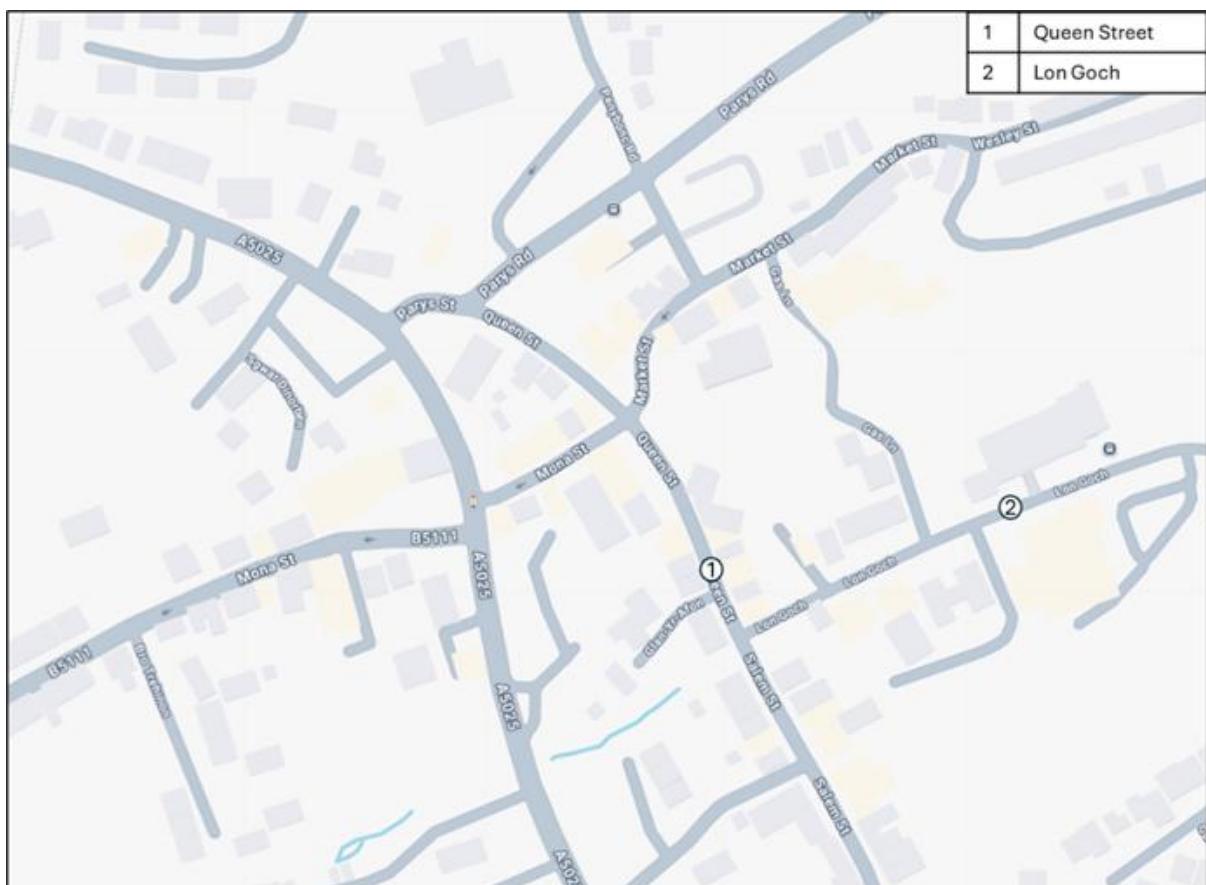
Figure 21: Amlwch Footfall Heat Map, February 2024 vs August 2024



Source: Datscha

47. Two locations in Amlwch have been sampled to assess footfall trends over recent years, the first at Queen Street (1) within the centre boundary and the second (2) close to the Co-op, which is outside the boundary but is likely to be a major customer draw.

Figure 22: Amlwch Footfall Locations

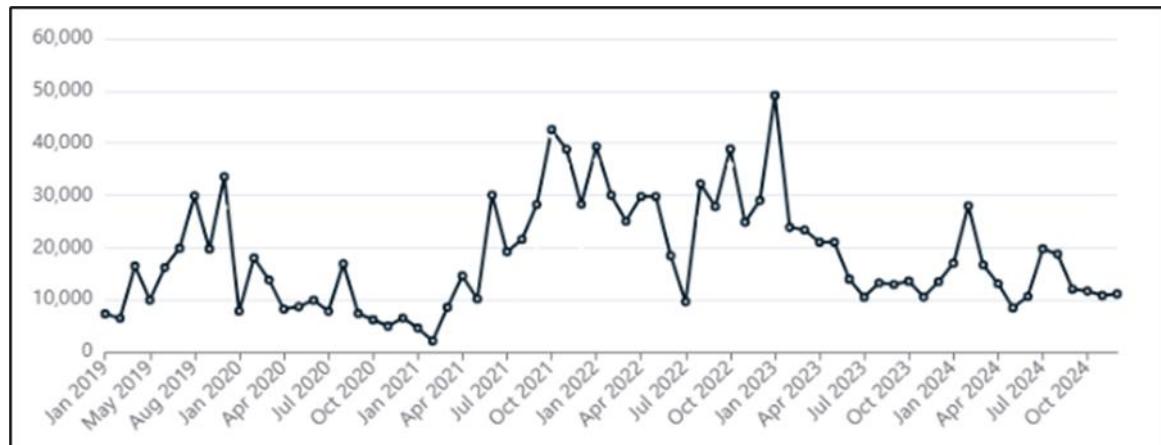


Source: Datscha

48. The figure below shows how footfall levels have changed between January 2019 and December 2024. As can be seen, footfall slowly increased in 2019, where monthly movements were between 7,000 and 34,000. During 2020, this fell,

reflecting early stages of pandemic restrictions. This was then followed by higher monthly movements between 2021 to 2023, seeing highs of 49,000 and lows of 10,000. In 2024, footfall declined again, stabilising between 10,000 and 20,000, although February 2024 saw a temporary spike to 28,000 monthly movements.

Figure 23: Queen Street Footfall Graph, January 2019 – December 2024

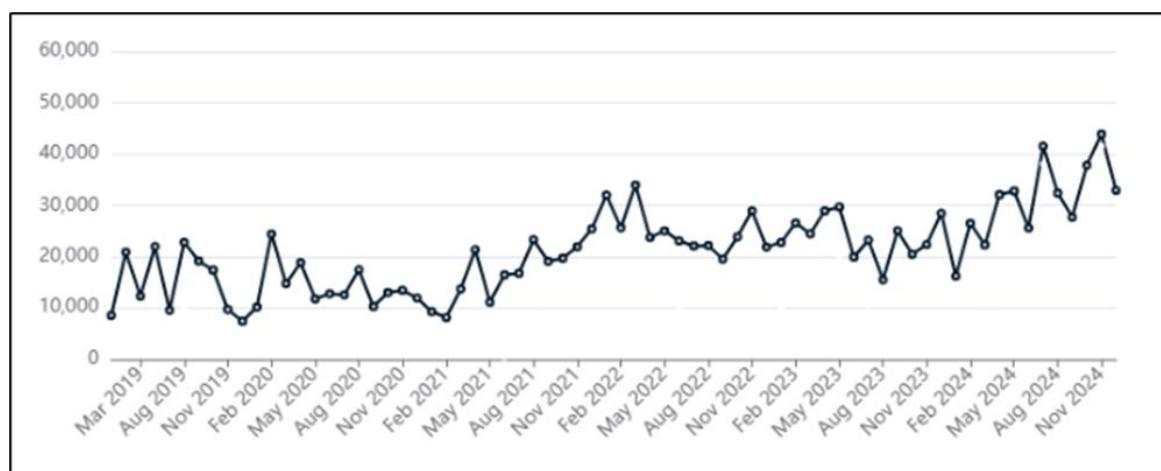


Source: Datscha

49. A section along Lon Goch, near Co-op Food, outside the town centre boundary, has also been sampled to assess footfall trends over the recent years.

50. The figure below shows how footfall levels have changed between January 2019 and December 2024. As can be seen, footfall has gradually increased from 2019 to 2024. Footfall was between 8,400 and 22,700 in 2019, and between 19,500 and 28,900 in 2022, showing a gradual increase. This continued into 2024, where monthly movements were between 16,200 and 43,800, with the highest peak in November.

Figure 24: Lon Goch Footfall Graph, January 2019 – December 2024



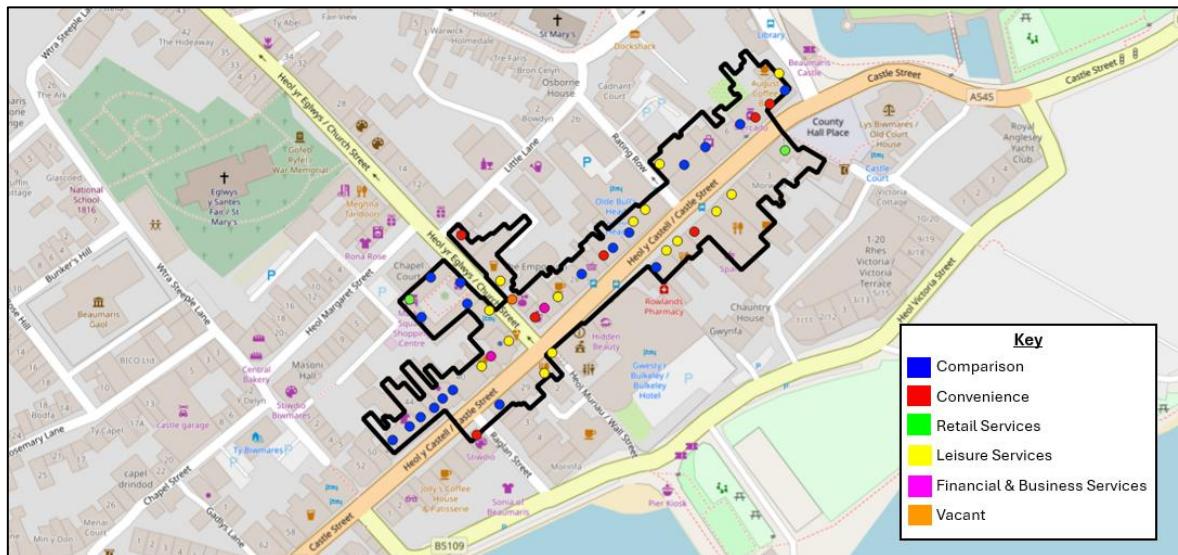
Source: Datscha

5. Beaumaris Local Centre

Diversity of Uses

51. A LSH site visit was conducted in September 2025 to establish the mix of uses within Beaumaris Local Centre.

Figure 25: Beaumaris Diversity of Uses Map



52. The table below outlines Beaumaris' diversity of uses based on outlets and provides a comparison to Goad's UK averages.

Figure 26: Beaumaris Diversity of Uses

	No. of Outlets	% of Total Outlets		
		Beaumaris	UK Average	Difference
Comparison Retail	19	41.3%	26.4%	+14.9%
Convenience Retail	7	15.2%	9.3%	+5.9%
Retail Services	2	4.3%	15.9%	-11.6%
Leisure Services	15	32.6%	25.8%	+6.8%
Financial & Business Services	2	4.3%	8.3%	-4.0%
Vacant	1	2.2%	14.1%	-11.9%
Total	46	100.0%	100.0%	

Source: LSH Site Visit, September 2025

53. Comparison retail is the dominant use in Beaumaris and is made up of a range of charity, clothing, gift and antique shops.

54. The convenience retail provision is also above the UK average and includes national multiples such as SPAR and a number of specialist independents including Anglesey Hamper Co (deli) and Mercado (butchers).

55. The leisure services offer is also strong and includes six cafes (including The Grove, Deli Dydd and Beau's Tea Rooms), and a selection of restaurants and pubs, reflecting the importance of visitor trade in the centre. However, the retail services offer is limited, with only Home and Cruise (travel agents) and In Trim Barbers recorded, as is the financial services offer.

Vacancies

56. There is just one vacant unit in Beaumaris centre, which represents 2.2% of the overall outlets, significantly lower than the UK average of 14.1%) This vacancy is the former Sanctuary of Scents store on Church Street.

Footfall

57. The figure below illustrates the pedestrian flows for Beaumaris in the form of a heat map showing total pedestrian movements for February 2024 and August 2024. As can be seen, footfall levels are highest along Castle Street. There is also a notable concentration of higher footfall at the corner of Margaret Street and Steeple Lane, as well as on Church Street, near Market Square Shopping Centre and Alma Street.

58. As can be seen from the figures below, footfall levels are higher during the summer.

Figure 27: Beaumaris Footfall Heat Map, February 2024 vs August 2024

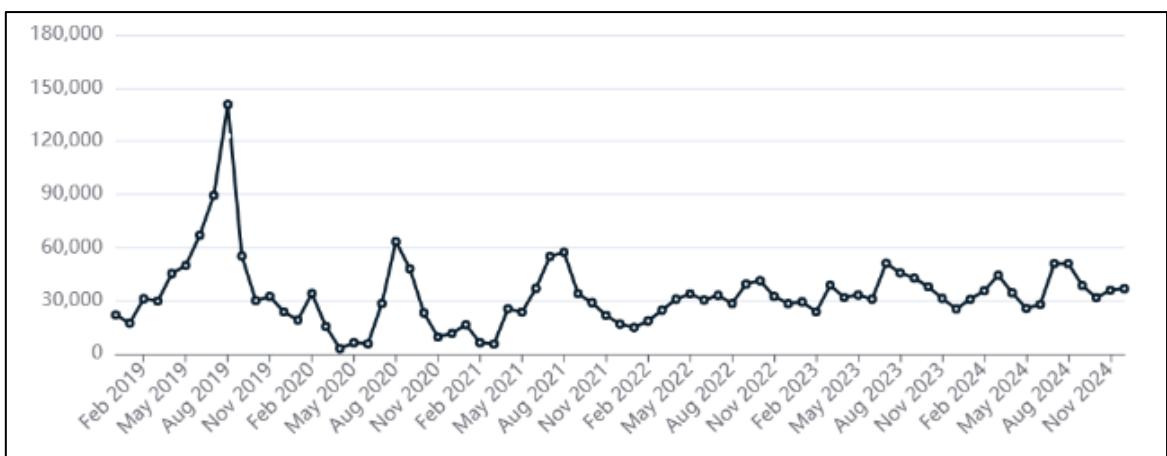


Source: Datscha

59. A central point along Castle Street has been sampled to assess footfall trends over recent years.

60. As can be seen in the figure below, footfall in 2019 peaked during the summer months, reaching highs of 140,000. After the pandemic footfall peaked at 63,000 in summer 2020 and 57,000 in 2021. Since then, footfall has declined slightly, with more modest peaks observed in 2023 and 2024. Summer visitor numbers however increase footfall significantly, with the highest recorded in 2024, being July at 51,000 and the lowest in May at 26,000.

Figure 28: Beaumaris Footfall Graph, January 2019 – December 2024



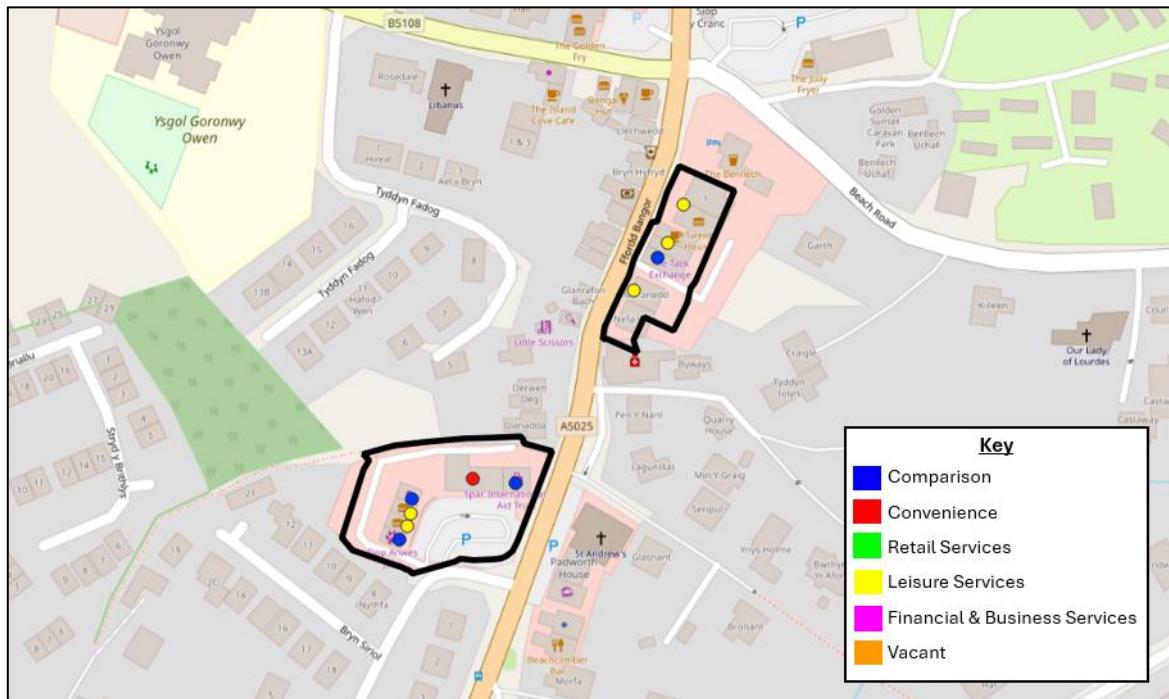
Source: Datscha

6. Benllech Local Centre

Diversity of Uses

62. A LSH site visit was conducted in September 2025 to establish the mix of uses within Benllech Local Centre.

Figure 29: Benllech Diversity of Uses Map



63. The table below outlines Benllech's diversity of uses based on outlets and provides a comparison to Goad's UK averages. However, it should be noted that only a relatively small proportion of the retail units within Benllech are located within the defined centre.

Figure 30: Benllech Diversity of Uses

	No. of Outlets	% of Total Outlets		
		Benllech	UK Average	Difference
Comparison Retail	4	40.0%	26.4%	+13.6%
Convenience Retail	1	10.0%	9.3%	+0.7%
Retail Services	0	0.0%	15.9%	-15.9%
Leisure Services	5	50.0%	25.8%	+24.2%
Financial & Business Services	0	0.0%	8.3%	-8.3%
Vacant	0	0.0%	14.1%	-14.1%
Total	10	100.0%	100.0%	

Source: LSH Site Visit, September 2025

64. Comparison retail and leisure services dominate the offer within Benllech. The comparison offer includes Pip's Pet Supplies, International Aid Trust (charity shop) and Lloriau Gorau - Finest Floors. The leisure services offer is made up of three fast-food and takeaways, one café and one restaurant.

65. The convenience outlet within the centre is the SPAR store. Co-op and Tesco Express stores are present just beyond the centre boundaries.

Vacancies

66. No vacant units were recorded in the centre at the time of the site visit.

Footfall

67. There is limited footfall data available for Benlech, but the figure below illustrates the pedestrian flows for central Benlech in the form of heat maps showing total pedestrian movements for February 2024 and August 2024.

68. As can be seen, monthly footfall appears to be fairly consistent throughout the year, with no major differences noted between February 2024 and August 2024, based on the footfall categories used by Datscha.

Figure 31: Benlech Footfall Heat Map, February 2024 vs August 2024



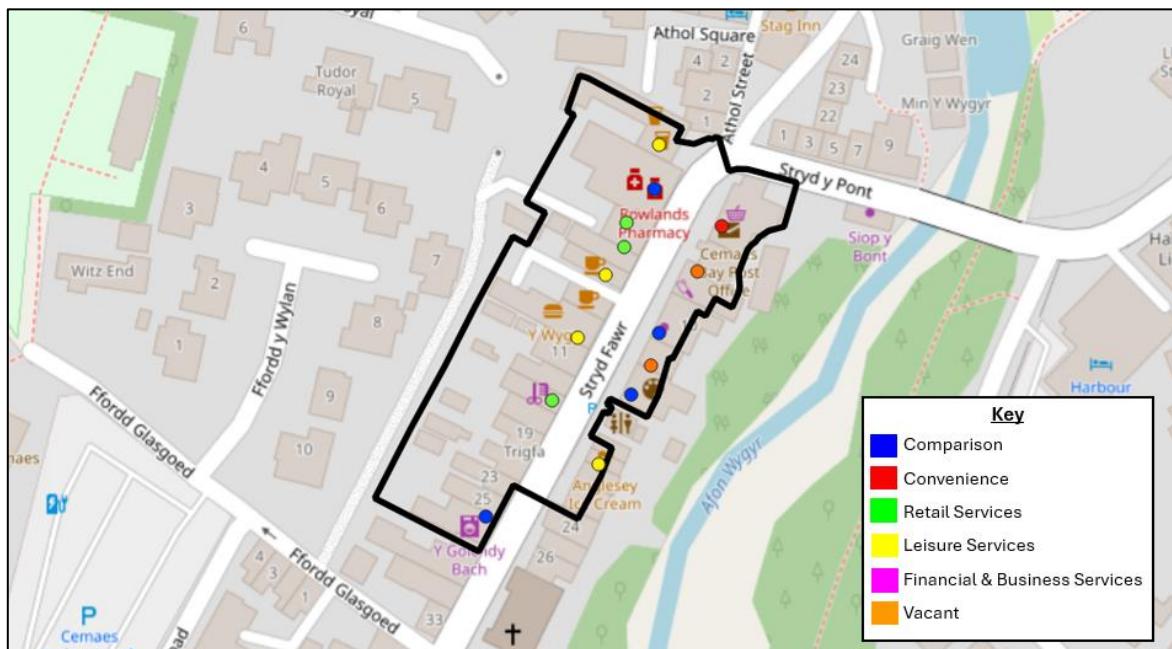
Source: Datscha

7. Cemaes Local Centre

Diversity of Uses

69. A LSH site visit was conducted in September 2025 to establish the mix of uses within Cemaes Local Centre.

Figure 32: Cemaes Diversity of Uses Map



70. The table below outlines Cemaes' diversity of uses based on outlets and provides a comparison to Goad's UK averages.

Figure 33: Cemaes Diversity of Uses

	No. of Outlets	% of Total Outlets		
		Cemaes	UK Average	Difference
Comparison Retail	4	28.6%	26.4%	+2.2%
Convenience Retail	1	7.1%	9.3%	-2.2%
Retail Services	3	21.4%	15.9%	+5.5%
Leisure Services	4	28.6%	25.8%	+2.8%
Financial & Business Services	0	0.0%	8.3%	-8.3%
Vacant	2	14.3%	14.1%	+0.2%
Total	14	100.0%	100.0%	

Source: LSH Site Visit, September 2025

71. The comparison retail offer consists of Y Golchdy Bach (clothing), Rowlands Pharmacy, Menter Y Pentre (gift shop) and Oriel Cemaes (artwork).

72. The convenience retail offer comes in the form of the Morrison's Daily store, which houses a Post Office.

73. The retail services offer is made up of Tracey Jane's Hair Salon, Cemaes Barbers and Spectrum (hairdressers).

74. There are two cafes and a fast-food & takeaway in Cemaes (Y Wygyr Fish and Chips), with the Stag Inn pub located just beyond the centre boundary and so not included within the data.

Vacancies

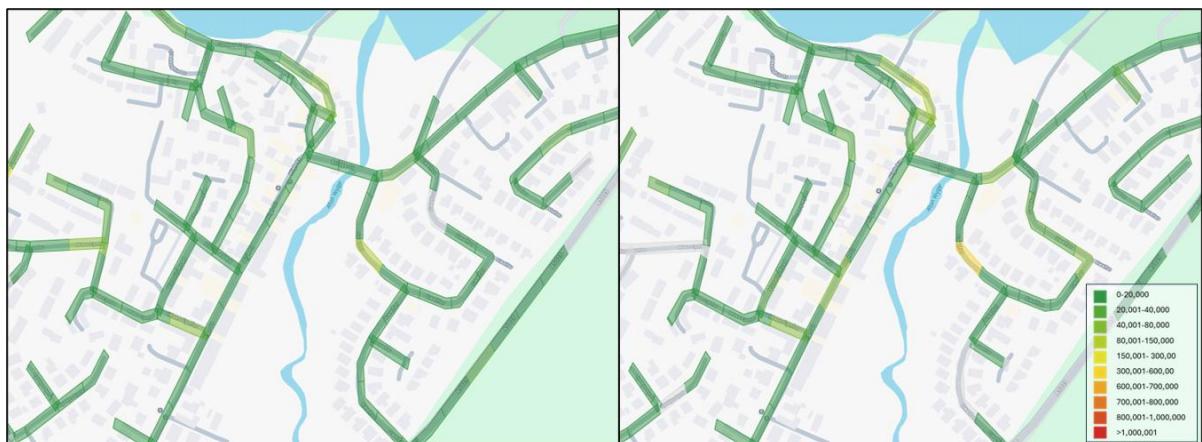
75. There are two vacant outlets in Cemaes at the time of the site visit, which represents 14.3% of the overall outlets.

Footfall

76. The figure below illustrates the pedestrian flows for Cemaes in the form of a heat map showing total pedestrian movements for February 2024 and August 2024. Footfall levels within the centre are relatively similar, but higher footfall is seen along Ffordd Y Traeth and Athol Street (outside the centre) during the summer. This is likely to be due to the cluster of hotels in this area.

77. A similar uplift in footfall can be seen along High Street, particularly in the south, towards Cemaes Bay.

Figure 34: Cemaes Footfall Heat Map, February 2024 vs August 2024

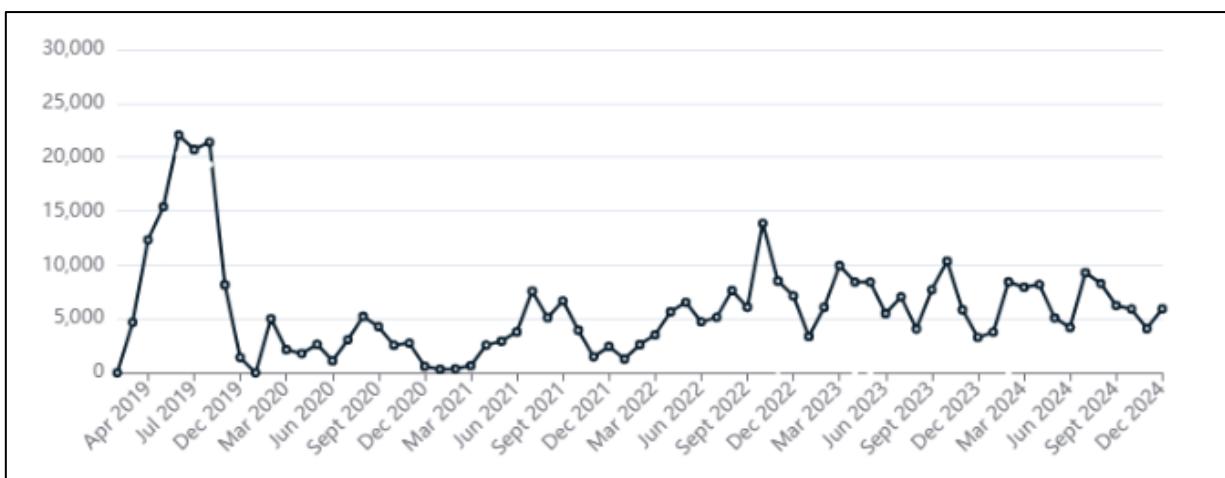


Source: Datscha

78. A section along High Street, near Cemaes Baykes and Y Wygyr Fish and Chips, has been sampled to assess footfall trends over recent years.

79. The figure below shows how footfall levels have changed between January 2019 and December 2024. As can be seen, pedestrian activity declined sharply during the pandemic, falling from pre-pandemic summer peaks of over 20,000 monthly movements to below 5,000 between January 2020 to June 2021. A modest recovery was observed in summer 2021, followed by gradual increases from 2022. However, footfall has remained inconsistent, fluctuating between 4,000 and 10,000 monthly movements, with summer peaks no longer showing significant growth. For 2024, July recorded the highest footfall, reaching 9,300, while June recorded the lowest footfall at 4,200.

Figure 35: Cemaes Footfall Graph, January 2019 – December 2024



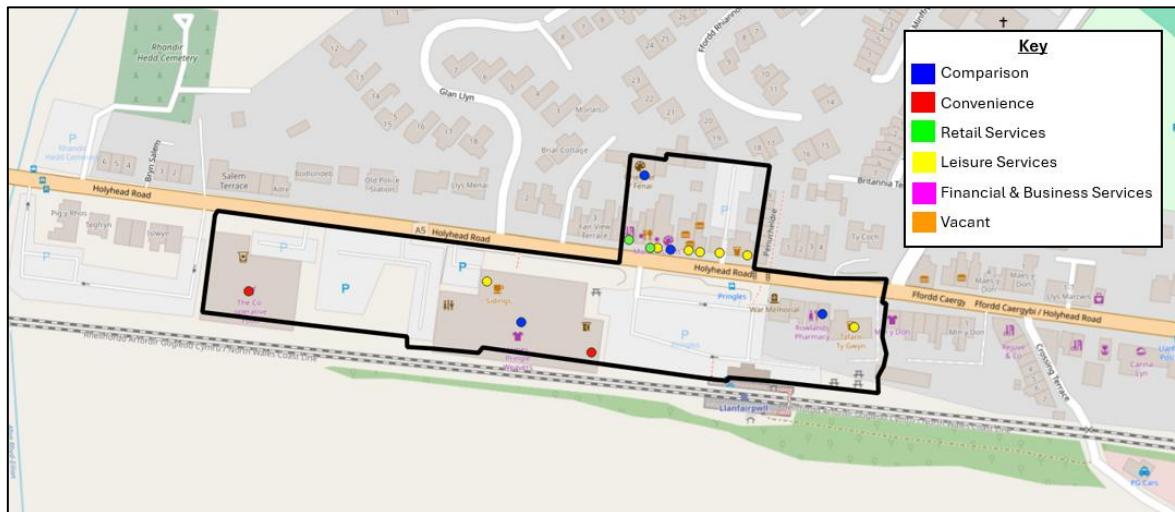
Source: Datscha

8. Llanfairpwll Local Centre

Diversity of Uses

80. A LSH site visit was conducted in September 2025 to establish the mix of uses within Llanfairpwll Local Centre.

Figure 36: Llanfairpwll Diversity of Uses Map



81. The table below outlines Llanfairpwll's diversity of uses based on outlets and provides a comparison to Goad's UK averages.

Figure 37: Llanfairpwll Diversity of Uses

	No. of Outlets	% of Total Outlets		
		Llanfairpwll	UK Average	Difference
Comparison Retail	4	26.7%	26.4%	+0.3%
Convenience Retail	2	13.3%	9.3%	+4.0%
Retail Services	2	13.3%	15.9%	-2.6%
Leisure Services	7	46.7%	25.8%	+20.9%
Financial & Business Services	0	0.0%	8.3%	-8.3%
Vacant	0	0.0%	14.1%	-14.1%
Total	15	100.0%	100.0%	

Source: LSH Site Visit, September 2025

82. The comparison retail offer is led by the James Pringle Weavers department store, which houses a range of clothing and footwear brands including Peacocks and Pavers. Sidings café and Hootons Homegrown Farm Shop are also present here.

Figure 38: James Pringle Weavers Sign



Source: LSH Site Visit

83. The convenience offer is dominated by the Co-op store to the west of the centre with its dedicated car park. The store has an approximate gross floorspace of 1,500 sqm.
84. The retail services offer is made up of Sew Anglesey and Jemini Hair.
85. Away from Sidings café within the James Pringle Weavers department store building, the leisure services offer is formed of one other café (Caffi Celt), two pubs and two fast-food & takeaways.

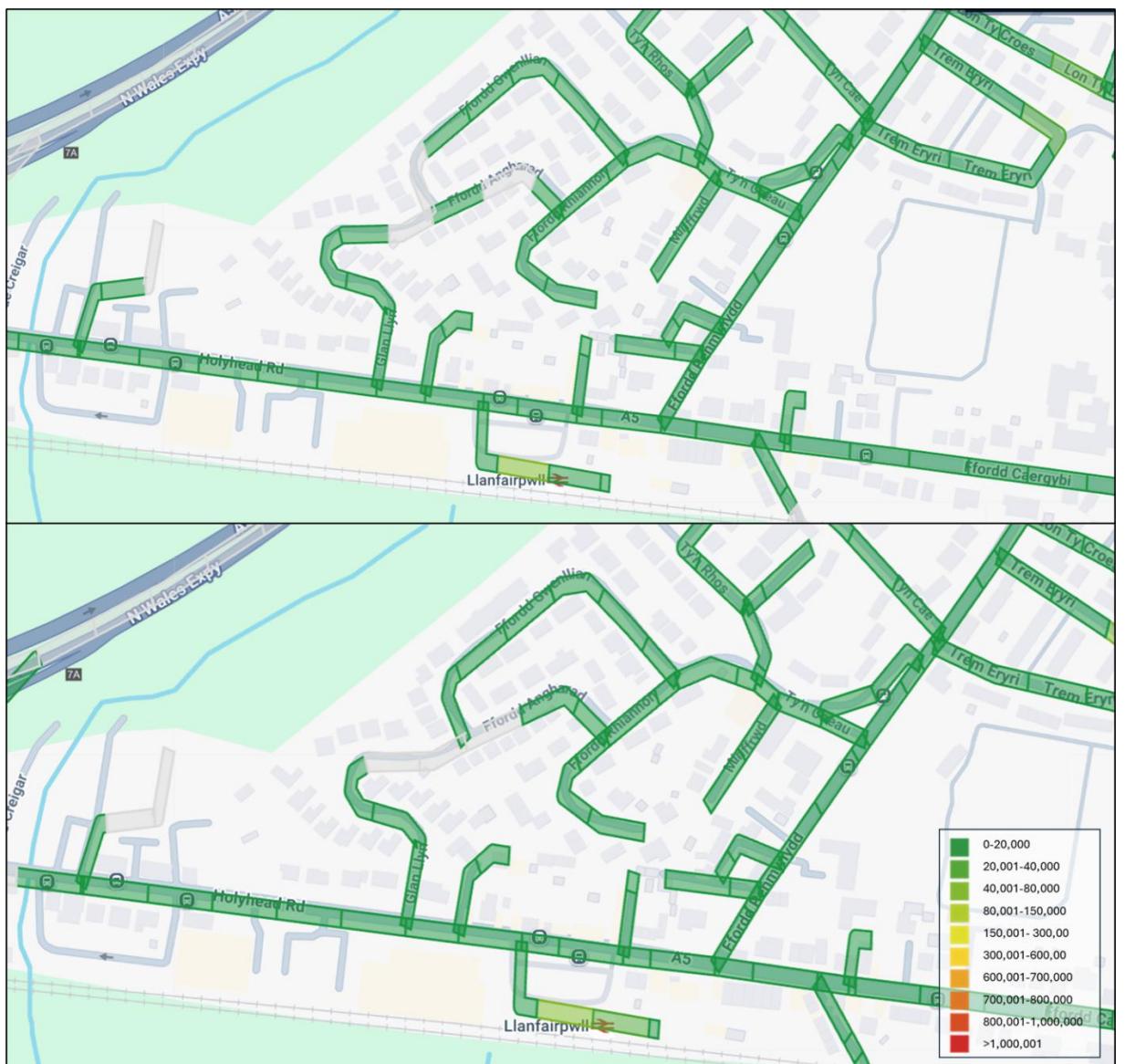
Vacancies

86. No vacant units were recorded during the September 2025 the site visit.

Footfall

87. The figure below illustrates the pedestrian flows for Llanfairpwll in the form of a heat map showing total pedestrian movements for February 2024 and August 2024. Footfall levels are highest close to the railway station, reflecting the particular tourist draw to the station signage. However, monthly footfall variation does not suggest a particular increase during the traditional holiday periods, based on the footfall categories used by Datscha.

Figure 39: Llanfairpwll Footfall Heat Map, February 2024 vs August 2024

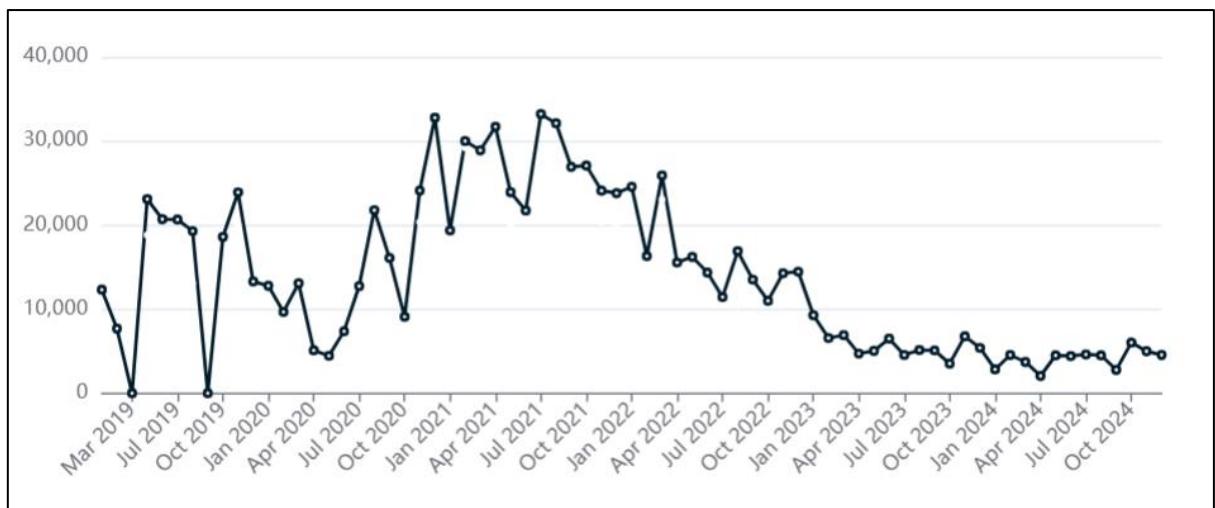


Source: Datscha

88. A central point along Holyhead Road, has been sampled to assess footfall trends over the recent years.

89. As can be seen in the figure below, monthly movements declined during and immediately after the pandemic but recovered steadily until 2022, once travel within the UK was permitted. However, since 2022, monthly movements have been decreasing with levels significantly lower in 2024 and ranging between 2,000 and 6,000 movements per month, compared to regular movements of over 20,000 in 2019.

Figure 40: Llanfairpwll Footfall Graph, January 2019 – December 2024



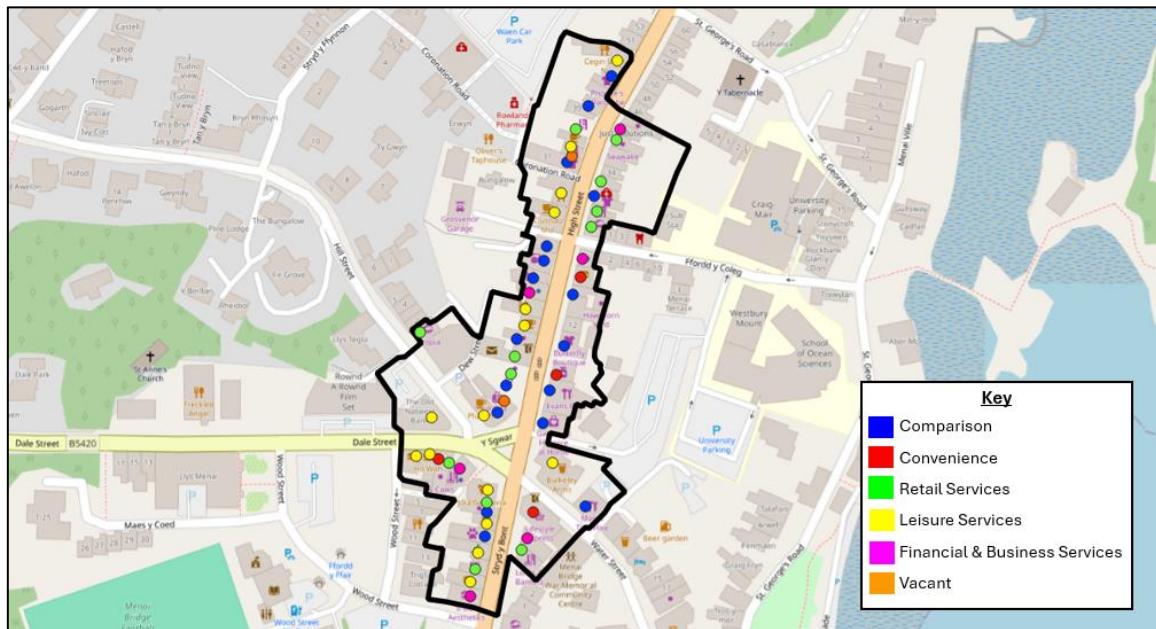
Source: Datscha

9. Menai Bridge Local Centre

Diversity of Uses

90. A LSH site visit was conducted in September 2025 to establish the mix of uses within Menai Bridge Local Centre.

Figure 41: Menai Bridge Diversity of Uses



91. The table below outlines Menai Bridge's diversity of uses based on outlets and provides a comparison to Goad's UK averages.

Figure 42: Menai Bridge Diversity of Uses

	No. of Outlets	% of Total Outlets		
		Menai Bridge	UK Average	Difference
Comparison Retail	17	30.4%	26.4%	+4.0%
Convenience Retail	4	7.1%	9.3%	-2.2%
Retail Services	12	21.4%	15.9%	+5.5%
Leisure Services	15	26.8%	25.8%	+1.0%
Financial & Business Services	6	10.7%	8.3%	+2.4%
Vacant	2	3.6%	14.1%	-10.5%
Total	56	100.0%	100.0%	

Source: LSH Site Visit, September 2025

92. The centre has a relatively good offer, with comparison retail being the dominant use. This includes a range of stores catering for both resident and visitor needs including furniture and home-related goods, clothing (ladieswear) outlets, craft & gift shops and charity shops.

93. The convenience retail offer is made up by Lifestyle Express (Off License), & Caws (deli), Menai Deli Sandwich Bar and Dylan's (bakers). The main supermarket is Waitrose which is located outside the centre boundary.

94. Health & beauty services make up just over half of the retail services offer (7 of 12), with other operators including the Post Office, the launderette and two travel agencies.

95. The leisure services offer is dominated by food and beverage operators, which is provided in five cafes, five fast-food & takeaways, two restaurants, a pub (see image below) and a bar.

Figure 43: Bulkeley Pub



Source: LSH Site Visit

Vacancies

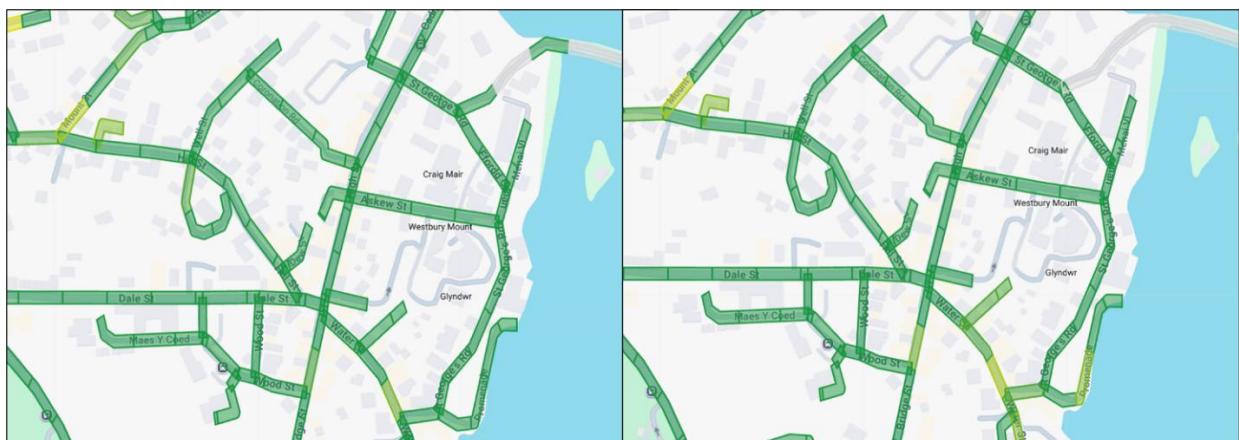
96. There were two vacant outlets in Menai Bridge at the time of the site visit, which represents 3.6% of the overall outlets, significantly lower than the UK average of 14.1%.

Footfall

97. The figure below illustrates the pedestrian flows for Menai Bridge in the form of a heat map showing total pedestrian movements for February 2024 and August 2024.

98. As can be seen from the figures below, footfall levels are slightly higher during the summer (August 2024) compared with February 2024. Footfall levels along Bridge Street and Water Street toward the coast show a noticeable concentration of higher activity in August compared to February.

Figure 44: Menai Bridge Footfall Heat Map, February 2024 vs August 2024

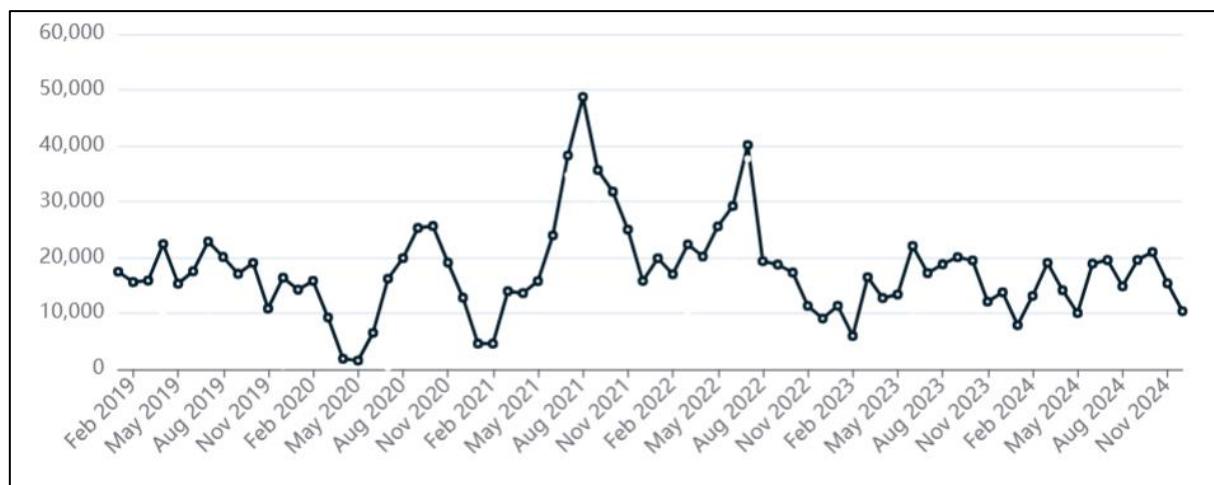


Source: Datscha

99. A central point along High Street, near Menai Bridge Post Office, has been sampled to assess footfall trends over recent years.

100. As can be seen in the figure below, footfall in 2019 ranged between 11,000 and 23,000, before dropping in line with pandemic-related lockdowns in early 2020. Monthly footfall peaked in August 2021 at 50,000 and again in July 2022 at 40,000. However, monthly movements declined thereafter, fluctuating between 6,000 and 24,000 from 2023 to 2024. These figures are broadly in line with pre-pandemic figures and the peaks seen during the summers of 2021 and 2022 have not been sustained.

Figure 45: Menai Bridge Footfall Graph, January 2019 – December 2024



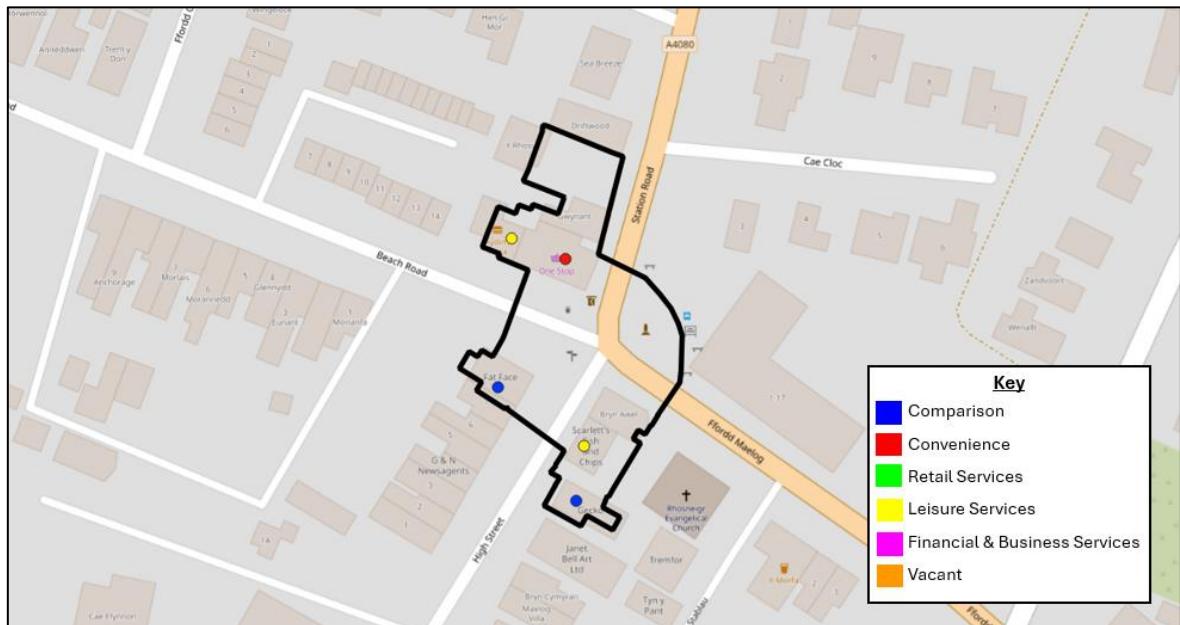
Source: Datscha

10. Rhosneigr Local Centre

Diversity of Uses

102. A LSH site visit was conducted in September 2025 to establish the mix of uses within Rhosneigr Local Centre.

Figure 46: Rhosneigr Diversity of Uses Map



103. The retail and leisure offer consists of Gecko (comparison retail), FatFace (comparison retail), One Stop (convenience retail, with Post Office inside), Aydin's Pizza (leisure service) and Scarlett's Fish and Chip Shop (leisure service).

Vacancies

104. No vacant units were recorded.

Footfall

105. The figure below illustrates the pedestrian flows for Rhosneigr in the form of heat maps showing total pedestrian movements for February 2024 and August 2024. As can be seen, footfall levels in the area are generally quite low, and appear to be fairly consistent throughout the year, with no major differences noted between February 2024 and August 2024, based on the footfall categories used by Datscha. However, a more detailed review of the data does indicate some variation across the seasons.

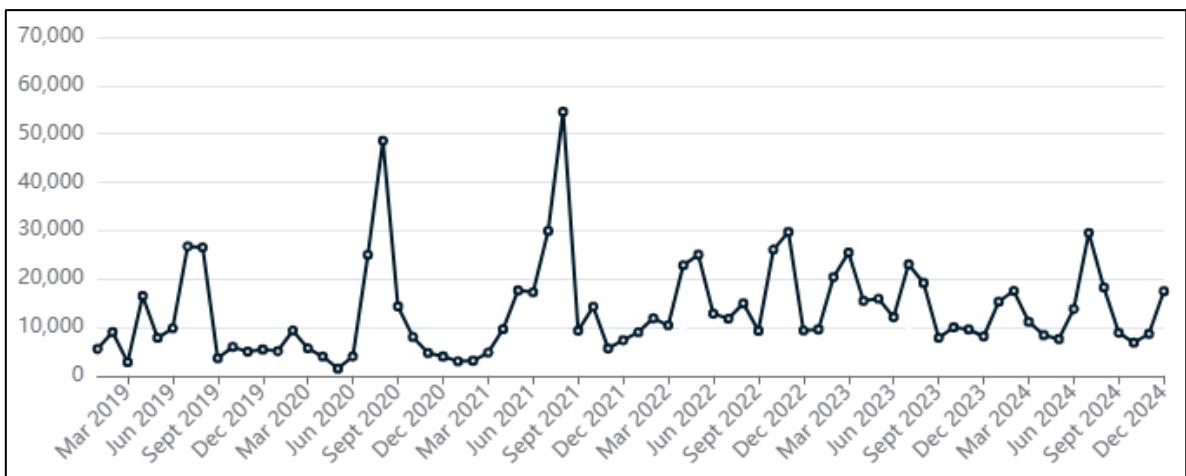
Figure 47: Rhosneigr Footfall Heat Map, February 2024 vs August 2024



Source: Datscha

- 106. A section within the centre, along Beach Road, has been sampled to assess footfall between January 2019 and December 2024.
- 107. As can be seen in the figure below, 2019, 2020 and 2021 saw particularly seasonal spikes in July and August. This trend has not continued, with the peak month for 2022 being November and 2023's high seen in March.
- 108. The peak for the whole period was August 2021, with a monthly count of 55,000. This and the slightly lower peak in 2020 is likely to be attributed to the Pandemic and the associated international travel restrictions/increase in staycations. Pedestrian activity levels have since dropped and range between 8,000 and 30,000 per month but remain higher than was seen in 2019.

Figure 48: Footfall Graph, January 2019 - December 2024



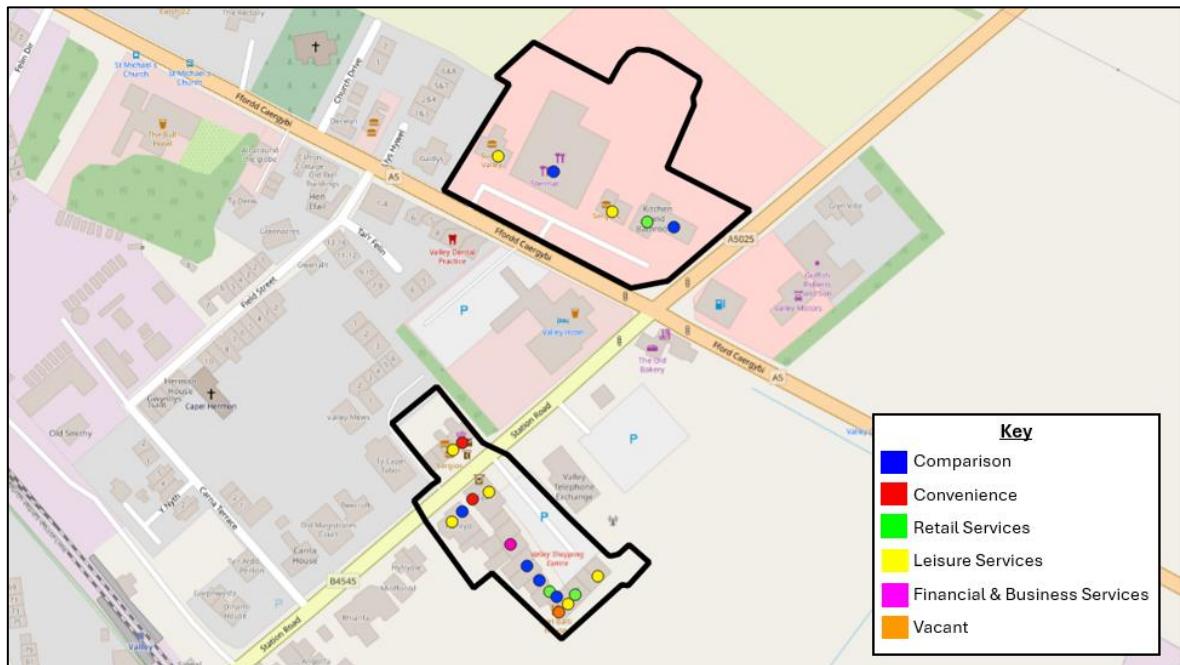
Source: Datscha

11. Valley Local Centre

Diversity of Uses

109. A LSH site visit was conducted in September 2025 to establish the mix of uses within Valley Local Centre.

Figure 49: Valley Diversity of Uses Map



110. The table below outlines Valley's diversity of uses based on outlets within the defined centre and provides a comparison to Goad's UK averages.

Figure 50: Valley Diversity of Uses

	No. of Outlets	% of Total Outlets		
		Valley	UK Average	Difference
Comparison Retail	6	30.0%	26.4%	+3.6%
Convenience Retail	2	10.0%	9.3%	+0.7%
Retail Services	3	15.0%	15.9%	-0.9%
Leisure Services	7	35.0%	25.8%	+9.2%
Financial & Business Services	1	5.0%	8.3%	-3.3%
Vacant	1	5.0%	14.1%	-9.1%
Total	20	100.0%	100.0%	

Source: LSH Site Visit, September 2025

111. The comparison retail offer makes up almost one in three of the outlets and includes Oriel Bay Tree Gallery, Kitchen and Bathroom Collection, Stermat Hardware and Acacia Florist.

112. The convenience retail offer is provided by Premier and SPAR, both located along the B4545. The Premier houses a Post Office and the SPAR a Subway.

113. The retail services offer consists of Michael Robert Salon, Jo B's Beauty Salon and a dry cleaners & launderette.

114. The leisure services offer is dominated by fast-food & takeaways (five). There are also two cafés in Valley.

Vacancies

115. One vacant outlet was recorded in Valley during the site visit, which represents 5% of the total number of outlets in the centre. This vacancy is the former Agra restaurant.

Footfall

116. The figure below illustrates the pedestrian flows for Valley in the form of a heat maps showing total pedestrian movements for February 2024 and August 2024. As can be seen, footfall levels are concentrated along B4545, close to the Spar and Anglesey Fine Food outlets and footfall here is slightly higher than in the rest of the centre.

117. Footfall levels in August are also slightly higher compared to February, with higher footfall again recorded in sections along B4545 near Spar and on Holyhead Road, near Flaming Grill and Sunny Valley, as well as Valley train station.

Figure 51: Valley Footfall Heat Map, August 2024 vs February 2024

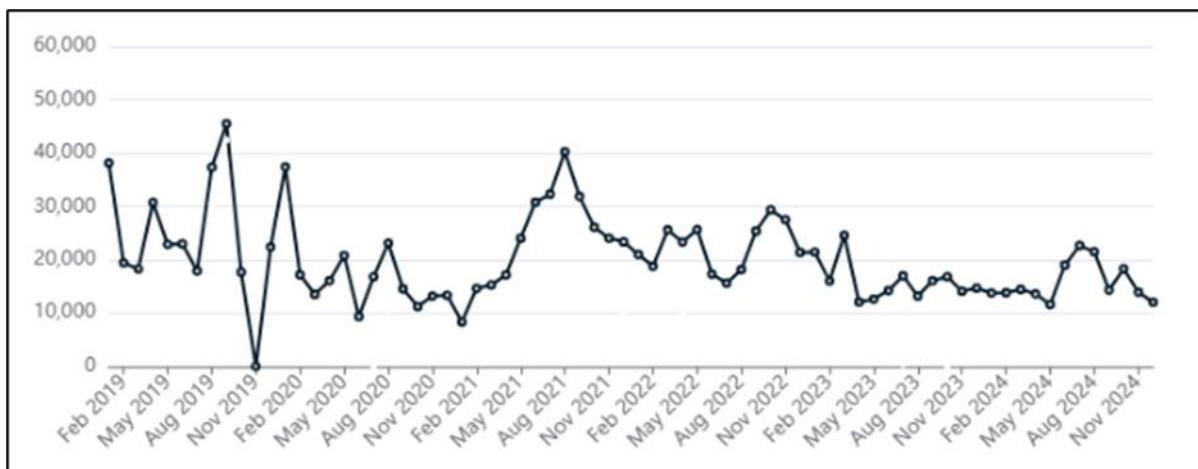


Source: Datscha

118. A section along B4545, near Spar Valley, has been sampled to assess footfall trends over recent years.

119. The figure below shows changes in footfall levels along the B4545 between January 2019 and December 2024. As can be seen, pedestrian activity during the period has fluctuated significantly, but appears generally to have decreased since 2019. Then monthly movements were between 18,000 and 45,000 (with an anomaly in November). Figures slowly increased in 2021, reaching 40,000 in August, but since then have fallen and stabilised between 11,000 and 22,000 a month in 2024.

Figure 52: Valley Footfall Graph, January 2019 – December 2024



Source: Datscha

12. Gaerwen

Diversity of Uses

121. A LSH site visit was conducted in September 2025 to establish the mix of uses within Gaerwen.

Figure 53: Gaerwen Diversity of Uses Map



122. The retail and leisure offer is split across two separate location and consists of Stermat Hardware (comparison retail), Nisa Local (convenience retail), Morrisons Daily (convenience retail), Lees Chinese Takeaway (leisure service), Gaerwen Fish & Chips (leisure service) and Tŷ Crwn Garage (retail service).

Vacancies

123. One vacant unit was recorded, which is the former Gaerwen Arms pub. There was a fire at the pub in June 2023, and it has yet to re-open. The pub was put up for sale in 2025.

Footfall

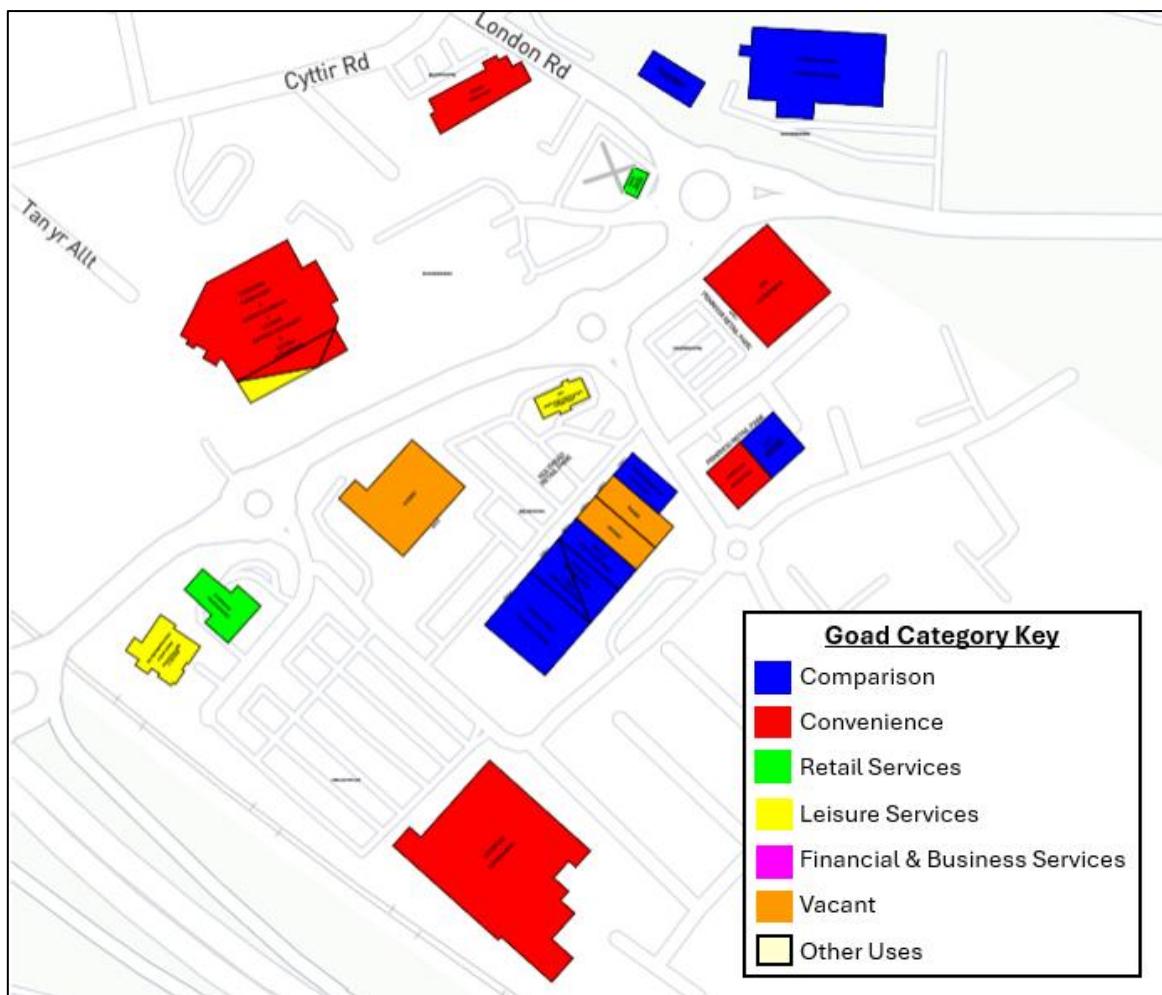
124. Information on footfall for Gaerwen is not available.

13. Penrhos Retail Park

Diversity of Uses

125. Goad data from October 2023 has been used to assess Penrhos Retail Park's mix of uses. The figure below shows the area covered by Goad and the uses found on the retail park.

Figure 54: Penrhos Retail Park Diversity of Uses Map



Source: Experian Goad, October 2023

126. The table below outlines Penrhos Retail Park's diversity of uses based on outlets and provides a comparison to Goad's UK averages.

Figure 55: Penrhos Retail Park Diversity of Uses - Outlets

	No. of Outlets	% of Total Outlets		
		Penrhos Retail Park	UK Average	Difference
Comparison Retail	8	34.8%	26.4%	+8.4%
Convenience Retail	7	30.4%	9.3%	+21.1%
Retail Services	2	8.7%	15.9%	-7.2%
Leisure Services	3	13.0%	25.8%	-12.8%
Financial & Business Services	0	0.0%	8.3%	-8.3%
Vacant	3	13.0%	14.1%	-1.1%
Total	23	100.0%	100.0%	

Source: Experian Goad, October 2023

127. The table below outlines Penrhos Retail Park's diversity of uses based on floorspace and provides a comparison to Goad's UK averages.

Figure 56: Penrhos Retail Park Diversity of Uses - Floorspace

	Gross Floorspace (sqm)	% of Total Floorspace		
		Penrhos Retail Park	UK Average	Difference
Comparison Retail	7,350	28.3%	29.4%	-1.1%
Convenience Retail	13,308	51.3%	15.6%	+35.7%
Retail Services	831	3.2%	7.3%	-4.1%
Leisure Services	1,313	5.1%	26.7%	-21.6%
Financial & Business Services	0	0.0%	6.3%	-6.3%
Vacant	3,139	12.1%	14.2%	-2.1%
Total	25,940	100.0%	100.0%	

Source: Experian Goad, October 2023

128. The comparison retail offer is led by operators including Home Bargains, B&M, Poundland and Argos.

129. The convenience retail offer is largely formed by Morrisons (5,600 sqm), Tesco (3,600 sqm) and Aldi (2,100 sqm).

Vacancies

130. There is a total of three vacant outlets at Penrhos Retail Park which represents 13% of all units and 12.1% of floorspace. These units take up 3,139 sqm of floorspace.