ANGLESEY AND GWYNEDD JOINT LOCAL DEVELOPMENT PLAN (2011 – 2026)

PUBLIC EXAMINATION:

Hearing Session 5 – Economy – Employment, Retail and Tourism

Action Point 6 (S5/PG6) – Retail and Wylfa

Maters Arising Change in order to:

Prepare a paper updating the Gwynedd and Anglesey Retail Assessment in order to consider the latest information on the requirements associated with Wylfa Newydd.

Councils' Response:

In order to respond to the Inspector's enquiry the Councils sought advice from Applied Planning, the consultant who conducted the Retail Study, please see attached document.

On this basis the Councils do not propose to suggest Matters Arising Changes to the Plan.

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3rd October 2016

Heledd Jones
Anglesey and Gwynedd Joint Planning Policy Unit
Gwynedd Council
1st Floor City of Bangor Council Offices
Bangor
Gwynedd
LL57 1DT

Dear Heledd,

Anglesey and Gwynedd Joint Local Development Plan; Retail Implications of Proposed Development of a Power Station at Wylfa

The Council have requested further advice on the potential effects on retail demand of the proposed construction of the Wylfa Power Station following a question raised by the Inspector during a recent Hearing session on the retail policies of the Local Development Plan.

At the time of preparing the Retail Study a limited amount of information was known about the numbers and characteristics of the workers involved, the phasing of construction and disposition of proposed accommodation facilities.

More recent figures provided by Horizon consultation documents show that the total workforce will amount to 10,720 between 2017 and 2027 with peak employment in late 2022.

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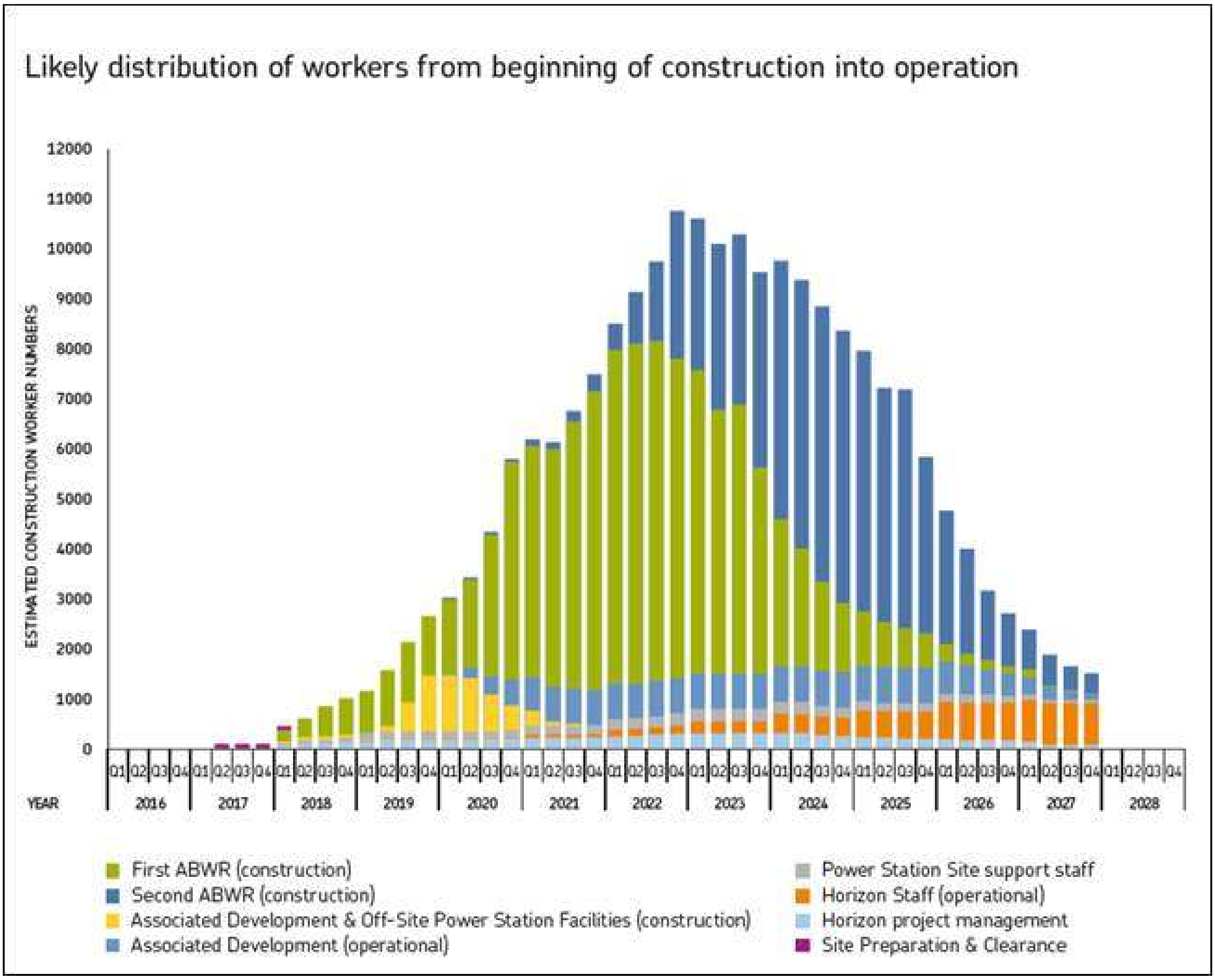

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Specific reference to the impact of Wylfa upon the retail offer was made in Volume 2 of the Gwynedd and Anglesey Retail Study (2013) especially in relation to the Local Centre of Amlwch, the nearest settlement to the site of the proposed Power Station. At paragraph 4.5 we reported that:

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

Amlwch is the largest centre within Zone 1 of the Retail Study.

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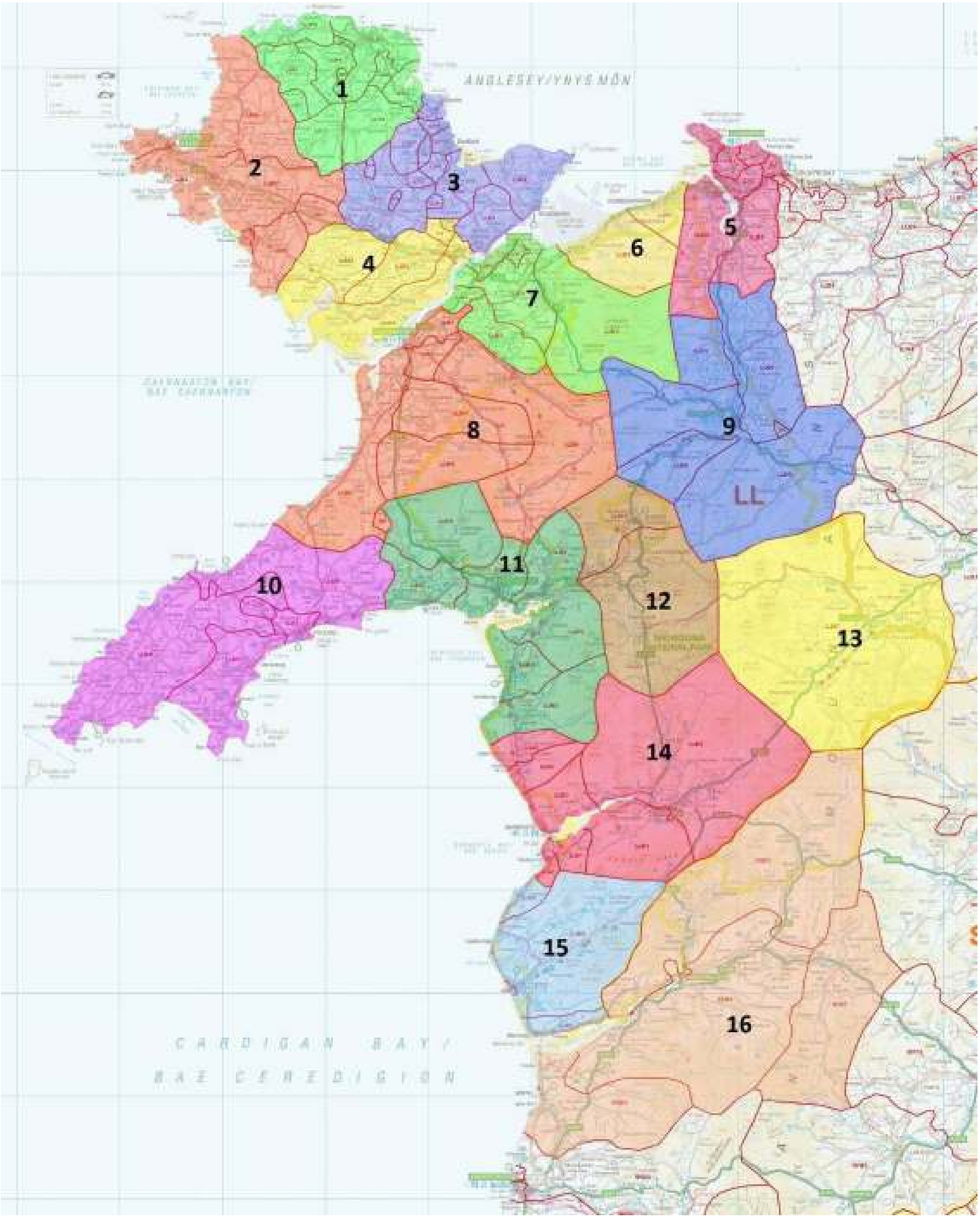

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TABLE 1: POPULATION AND COMPARISON GOODS EXPENDITURE ZONE 1 (AMLWCH)

Year	Zone 1 Population (Amlwch)	Comparison Goods £ per capita	Comparison Goods minus SFT £ per capita	Total Available Comparison Goods Expenditure (£m)	Clothing and Footwear (£m)	Furniture and Floor Coverings (£m)	Domestic Electrical and Gas Appliances (£m)	DIY, Decorating, Tools and Equipment for Garden and House (£m)	Medicines, Health Products and Cosmetics (£m)	Textiles, Soft Furnishing and Non-Electrical Household (£m)	Audio-visual Goods (£m)	Recreational Goods (£m)	Household Goods (£m)
2012	10,164	2,695	2,377	24.16	5.55	1.19	1.14	2.09	2.81	1.19	3.51	5.54	1.65
2016	10,572	3,047	2,663	28.16	6.19	1.23	1.26	2.10	3.13	1.27	4.88	6.44	1.66
2021	10,973	3,741	3,262	35.79	9.21	2.29	0.92	2.06	4.71	1.46	5.28	7.42	2.44
2026	11,371	4,430	3,887	40.87	11.31	2.57	0.99	2.58	5.79	1.79	6.61	8.36	2.99

Notes:
1. Source - Pitney Bowes Business Insight Anysite Report June 2012
2. Population figures provided up to 2021. 2026 figure based on a continuation of 2016 to 2021 trend
3. £ per capita figures provided at 2010, 2016 and 2021
4. £ per capita figures for 2012 based on average of 2010 - 2016 growth rate.
5. 2012 comparison expenditure split derived from continuation of 2010 expenditure split
6. £ per capita for 2026 calculated on a continuation of 2016-2021 growth rate
7. 2026 comparison expenditure split derived from continuation of 2021 expenditure split
8. Special Forms of Trading deducted in accordance with Pitneys Bowes Business Insight Retail Expenditure Guide 2011-2012 (13.4% in 2012 increasing to 14.7% by 2021)
9 Special Forms of Trading in 2026 deducted at 14.7%
10. 2010 prices

TABLE 28: POPULATION AND CONVENIENCE GOODS EXPENDITURE ZONE 1 (AMLWCH)

Year	Zone 1 Population (Amlwch)	Convenience Goods £ per capita	Convenience Goods £ per capita minus SFT (£m)	Available Convenience Goods Expenditure (£m)
2012	10,164	1,799	1,700	17.28
2016	10,572	1,814	1,706	18.04
2021	10,973	1,831	1,719	18.87
2026	11,371	1,848	1,735	19.73

Notes:
1. Source - Pitney Bowes Business Insight Anysite Report June 2012
2. Population figures provided up to 2021. 2026 figure based on a continuation of 2016 to 2021 trend
3. £ per capita figures provided at 2010, 2016 and 2021.
4. £ per capita figures for 2012 based on average of 2010 - 2016 growth rate.
5. £ per capita for 2026 calculated on a continuation of 2016-2021 growth rate
6. Special Forms of Trading deducted in accordance with Pitneys Bowes Business Insight Retail Expenditure Guide 2011-2012 (5.8% in 2012 increasing to 6.5% by 2021)
7 Special Forms of Trading in 2026 deducted at 6.5%
8. 2010 prices

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The scale of employment during construction of the Power Station is significant. Using Amlwch as an example, the analysis from Tables 1 and 28 shows that Comparison expenditure (adjusted for Special Forms of Retailing) was estimated by Pitney Bowes at £2,377/head in 2012 rising to £3,867/head in 2026 whilst Convenience expenditure was estimated at £1,700/head rising to £1,735/head over the same period. Using expenditure figures for 2021 and assuming that all the employees are 'single' workers this could amount to a potential £34.7m per annum of comparison expenditure and £18.4m per annum of expenditure on convenience goods.

However, it would be incorrect to take the workforce and using these spending estimates to judge whether existing facilities have sufficient capacity to cater adequately for this demand or to justify new permanent facilities. Only around 1,000 workers are regarded as permanent (operational) and they are on-site post 2022, the remainder are temporary during the various construction phases. The majority of the construction workforce will essentially be transient with many returning home at the end of their shift patterns. The spending habits of this population will be different to the resident population and it may be expected that retail expenditure will be on convenience goods rather than comparison. Much of the needs of the construction workers will be met by on-site canteens and small temporary convenience facilities providing for day-to-day essentials. Other expenditure will be through local pubs, restaurants, take-aways and through bed and breakfast accommodation with additional spending on convenience facilities due to the increased demand. These goods will be sourced from a variety of sources including local convenience stores.

The information issued by Horizon for a second stage public consultation period i.e PAC 2 provided the following facts relating to the workforce

- 2,700 will be local residents commuting daily,
- 3,300 will take up open market, rented and tourist accommodation
- between 4,700 and 5,700 in new build and empty properties and through temporary workers' accommodation.
- The population is intended to be distributed over a wide geographical area. Only 200 bedspaces are to be permanent in Amlwch with the bulk being located at Holyhead, Kingsland/Cae Glas for 3,500 purpose-built bedspaces that will be converted to tourist use and permanent housing after construction. The remainder will be in temporary housing which will be removed post-construction.

Conclusion

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To be relevant in retail terms, the demand must be essentially permanent and concentrated in a limited number of locations.

Most of the permanent demand for both convenience and comparison facilities will be focused on Holyhead which although the largest town on Anglesey was identified in the Retail Study as being underperforming in both categories. Whilst this ‘new’ expenditure will help improve the overall health of retailing in facilities it does not justify additional floorspace in Holyhead.

There will be economic benefits to stores in Amlwch. Table 47 shows that the prevailing turnover of the Co-op convenience store in Amlwch was £6,555 sq.m. which could be considered healthy but not excessive. In our view, stores will have sufficient capacity to cater for additional demand during the construction phases by more regular restocking although it may be that existing shops are extended.

There is unlikely to be sufficient permanent demand post construction to justify wholly new facilities although there should be no overriding policy objection as long as any facilities are located within the existing centres.

The Joint Local Development Plan will be monitored annually. There is a requirement to continue to maintain a current picture of the Plan area. We would also expect that the Retail Study will be updated in due course to inform the Plan’s review. In order that any significant unexpected changes can be taken into account in future revisions to the Local Plan. Since the current Retail Review had considered the potential impact on retail demand arising from Wylfa and since the information provided by PAC 2 reveals more information about the numbers of workers, the shift patterns, the transient pattern, the mix of accommodation, broad locations and on-site offer we do not believe that any review is necessary at this stage to specifically take account of the new Wylfa Power Station.

Paul Spivey

Director

Applied Town Planning Limited