



Pembrokeshire County Council

Retail Survey Data

March 2020 Survey

Contents Page

1.	Introduction and Summary	3
2.	Data for Town Centres	6
3.	Maps	13

The town centre retail survey was undertaken in March 2020, and prior to the Covid 19 pandemic ‘lockdown’.

It does not therefore account for the impact of the pandemic.

1. Introduction and Summary

2. This document includes survey data and maps from a Pembrokeshire Town Centre Survey conducted in March 2020. The following Town Centres were surveyed:

- Fishguard
- Haverfordwest
- Milford Haven
- Narberth
- Pembroke
- Pembroke Dock

Please note that Pembrokeshire Coast National Park Authority (PCNPA) conducted the survey for town centres in their planning jurisdiction area. These have been added to this report and highlighted in grey. The PCNPA survey was conducted in July 2018)

3. The survey focused on those properties within the identified Pembrokeshire Local Development Plan (LDP) Town Centre Boundaries for these Town Centres. These boundaries are shown on the maps in Section 3 of this report.
4. The Local Development Plan is currently under review and has completed formal Deposit consultation. Changes to retail policy, retail boundaries and designations were proposed as part of the consultation. Further proposed amendments, published as Focussed Changes during Summer / Autumn 2020 are possible, and as a result of the Inspector's recommendations following the Examination in Public.
5. **For each commercial property the following information was collected:**
 - Whether the ground floor was occupied or vacant
 - The use class of the ground floor using the Town and County Planning (Use Classes) Order 1987 (as amended).
6. Desk top analysis of maps has provided a gross floorspace for all retail units.
7. For vacant properties subsequent searches of historic planning files and previous surveys were used to help determine the last known use class, where possible.
8. The tables in the analysis section include information on:

A Class use classes:

9. The numbers of properties that were identified as being A1, A2 or A3 within the Use Classes Order. A1 uses are shops of all types including

supermarkets and retail warehouses. A1 uses also include hairdressers and sandwich bars (except those selling hot food) and some show rooms.

10. A2 uses are those offering financial and professional services to visiting members of the public, including banks, building societies, estate agents and betting offices.
11. A3 uses are food and drink outlets including restaurants, bars, pubs and take-aways.¹

Type of Class A property:

12. Disaggregating those units into A1, A2 and A3 use classes helps to provide a clearer picture of the type of service that a unit is providing. A1 units are generally comparison or convenience in nature, however some A1 uses offer services (such as a hairdresser or post office). A2 and A3 use classes are generally of a service nature. The types of unit are divided into the following:

- Comparison unit: Those units selling products of a durable nature to the general public. These are products such as clothing, electronics, music or books.
- Convenience unit: Those units selling products of a non-durable nature to the general public. These are products such as food or toiletries.
- Service unit: Those units offering a service to the general public. These are services such as hairdressers, betting shop or estate agent.

Summary of survey data

13. The percentage of vacant A class units have increased since March 2019 across all town centres except Pembroke Dock where the percentage of vacant A use class units has fallen. Vacancy rates remain above Wales national average² except at Pembroke and Narberth.
14. The former Riverside Market at Haverfordwest has been redeveloped as Glan Yr Afon and comprises a library, café and art gallery (classified as a single D1 use class) recorded as a single unit. The vacancy of A units at Haverfordwest town centre has increased between 2019 and 2020.
15. Vacancy rates in Haverfordwest, Pembroke Dock, Milford Haven (town centre and marina) and Fishguard remain above the National Average.

¹ Please note the A3 use class has been further amended in England, however this amendment does not currently apply in Wales.

² Vacancy rate 15.8% % for town centres, Wales average 2019.

Vacancy rates in Pembroke and Narberth remain below the Wales National Average. Centres which have a tourism and leisure role continue to perform better. Levels of betting shops have reduced from levels experienced in previous surveys. The number of charity shops has declined since 2019.

16. As in previous surveys many Pembrokeshire Town Centres have a larger proportion of service based units than the national average. In some instances this reflects the importance of tourism to a centre and indicates high levels of cafes and restaurants. In other cases it is indicative of a struggling town centre with low levels of comparison goods shopping provision.
17. The South West Wales Regional Retail Study (2017) provided analysis of the relative strengths and weaknesses of Pembrokeshire's town centres, based on the 2016 retail survey, consultant's visits to the centres and a household telephone survey. The survey suggests that this analysis of the relative strengths and weaknesses of Pembrokeshire's Town Centres continues to be relevant.
18. Additional influences on the occupation of units within town centres are the impact of Brexit, the reduction in the presence of banks and building societies on the high street, and the national strategy of some large scale retailers including discounters and fashion retailers. The reduction in the high street presence of betting shops is largely a reflection of increased online opportunities. The monitoring of betting shops in the high street is less relevant and it is proposed to cease monitoring of this individual use.
19. There has been an uptake in units for barbers and other service providers including vaping shops and beauty salons. These tend to be smaller units however.
20. The potential for appropriately located retail units to convert to residential or other non-commercial uses has failed to counter vacancy levels except at Pembroke Dock.

2.Data for Town Centres 2020

2.1 Number of Class A units

Town	Occupied A1	Occupied A2	Occupied A3	Occupied Mixed A class	Vacant A class	Total A class	% vacant A class	Total number of units vacant (all use classes excluding residential)
Fishguard	42	9	22	2	17	92	19 %	23
Haverfordwest	105	42	28	1	47	223	21%	54
Milford Haven	43	12	19	2	22	98	22%	24
Milford Marina ³	10	1	5	0	8	24	33%	8
Narberth	48	9	19	1	9	86	11%	11
Pembroke	55	16	20	2	17	110	15%	22
Pembroke Dock	54	15	12	0	26	107	24 %	27
Tenby	National Park survey dated July 2018 No break-down available				12	179	7	No breakdown available
Saundersfoot					1	63	2	
St Davids					3	62	5	
Solva					0	13	0	
Newport					1	30	3	

Note: Data is for ground floor units only.

UK Town Centre National Average Vacancy rate: 12.9% in 2019 (Source Local Data Company). Wales' vacancy rate for Town Centres was 15.8% % in 2019

2.2 Class A units Ground Floor floorspace (gross m sq) 2020

Floorspace	A1 (occupied) floorspace	A2 (occupied) floorspace	A3 (occupied) floorspace	Mixed A class (occupied)	Vacant A class	Grand Total
Fishguard	7169	939	3188	404	2169	13869
Haverfordwest	18748	6113	4161	141	7361	36524
Milford Haven	5620	1594	2957	602	2817	13590
Milford Marina	793	59	484	0	598	1934
Narberth	4404	540	2353	685	989	8971
Pembroke	8105	2108	3403	360	2290	16266
Pembroke Dock	10547	2480	1404	0	2854	17285
Tenby	National Park Survey dated July 2018				1802	21280
Saundersfoot					71	6584
St Davids					260	7514
Solva					0	1510
Newport					Data not available	

2.3 2014 - 2020 Type of Class A Units A. Unit numbers

	Fishguard	Haverfordwest	Milford Haven	Milford Marina	Narberth	Pembroke	Pembroke Dock
2014 Comparison (occupied)	39	94	30	8	42	34	48
2016 Comparison (occupied)	35	103	30	9	40	35	45
2018 Comparison (occupied)	32	90	34	9	40	33	38
2019 Comparison (occupied)	32	91	31	9	39	33	37
2020 Comparison (occupied)	29	80	29	8	35	33	36
2014 Convenience (occupied)	4	2	3	0	4	4	1
2016 Convenience (occupied)	4	2	3	0	4	3	1
2018 Convenience (occupied)	4	3	3	0	4	6	5
2019 Convenience (occupied)	4	3	2	0	4	6	5
2020 Convenience (occupied)	4	3	2	0	4	6	5
2014 Service (occupied)	43	106	47	11	42	63	45
2016 Service (occupied)	45	100	49	9	43	65	44
2018 Service (occupied)	43	94	45	11	41	60	40
2019 Service (occupied)	43	91	46	11	40	59	41
2020 Service (occupied)	42	95	42	8	37	54	39
2014 Vacant	9	42	21	0	2	7	17
2016 Vacant	16	45	18	1	2	8	21
2018 Vacant	19	38 ⁴	23	2	5	9	28
2019 Vacant	16	38	18	3	8	9	28

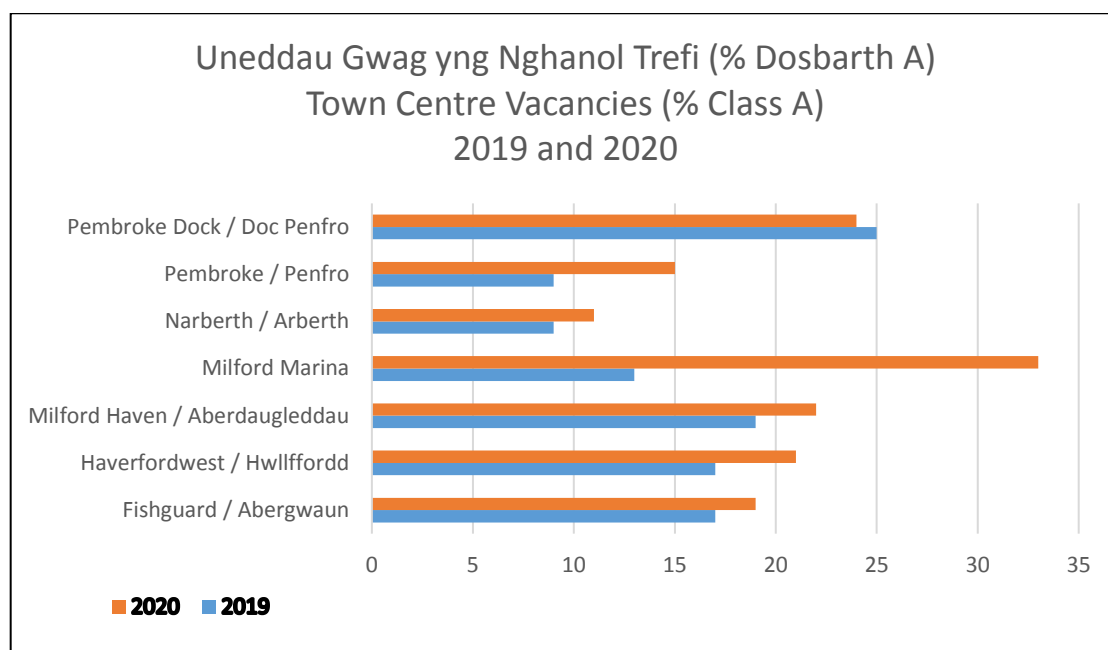
	Fishguard	Haverfordwest	Milford Haven	Milford Marina	Narberth	Pembroke	Pembroke Dock
2020 Vacant	17	44	17	8	10	15	26
2014 Total A class	95	244	101	19	91	109	111
2016 Total A class	100	250	101	19	90	113	111
2018 Total A class	98	225	106	22	90	108	111
2019 Total A class	93	223	98	23	90	107	112
2020 Total A class⁵	92	222	90	24	86	108	106

B. Floorspace (sq m gross) A Class 2020

Town	Comparison Floorspace (occupied)	Convenience Floorspace (occupied)	Service Floorspace (occupied)	Mixed (A Class) (occupied)	Vacant	Total
Fishguard	4925	1510	4861	0	2167	13463
Haverfordwest	15621	829	12573	0	6363	35386
Milford Haven	3890	697	5554	29	2817	12988
Milford Marina	666	0	670	0	597	1933
Narberth	3108	627	3560	0	1338	8633
Pembroke	4854	1001	7760	0	3285	16900
Pembroke Dock	5542	3860	5027	0	2858	17287

⁵ May not round as total figure includes mixed use with an element of A use class.

2.4 Graph illustrating A Class Vacancy Rates for 2019 and 2020



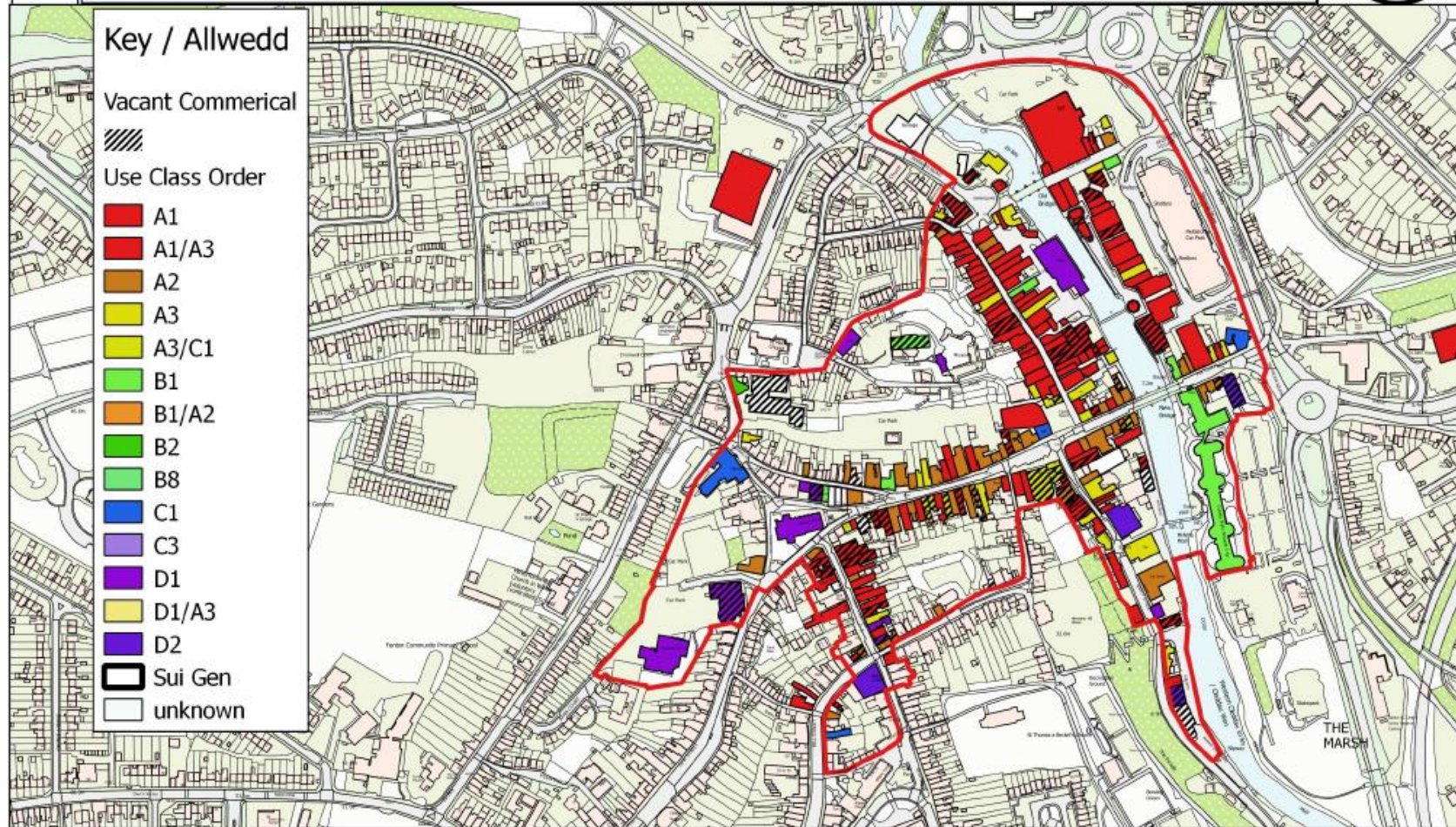
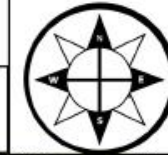
2.5 Changes in betting shops between 2009 and 2020 (only occupied units shown)

Betting shops Total Numbers							
Town	2009	2012	2014	2016	2018 ⁶	2019	2020
Fishguard	1	1	1	1	1	1	0
Haverfordwest	2	2	2	3	3	3	3
Milford Haven	2	3	3	3	3	3	2
Narberth	0	1	1	1	1	1	1
Pembroke	1	1	2	2	1	2	1
Pembroke Dock	0	1	2	3	2	2	2
Total	6	9	11	13	11	11	9
Newport	0	0	0	0	0	N/A	N/A
Saundersfoot	0	0	0	0	0	N/A	N/A
Solva	0	-	0	0	0	N/A	N/A
St Davids	0	0	0	0	0	N/A	N/A
Tenby	2	2	3	2	2	N/A	N/A
Total	2	2	3	2	2	N/A	N/A
Grand Total	8	11	14	15	13	N/A	N/A

2.6 Changes in charity shops between 2009 and 2020 (only occupied units shown)

Charity shops							
Town	2009	2012	2014	2016	2018	2019	2020
Fishguard	1	3	3	2	4	4	4
Haverfordwest	8	9	12	11	11	11	9
Milford Haven	3	3	4	3	4	7	4
Narberth	0	3	3	3	3	3	3
Pembroke	4	4	4	4	4	4	3
Pembroke Dock	1	1	7	5	4	6	5
Total	17	23	33	28	30	35	28
Newport	-	0	0	0	0	N/A	N/A
Saundersfoot	0	0	0	0	0	N/A	N/A
Solva	-	-	0	0	0	N/A	N/A
St Davids	1	1	1	1	1	N/A	N/A
Tenby	5	6	4	4	4	N/A	N/A
Total	6	7	5	5	5	N/A	N/A
Grand Total	23	30	38	33	35	N/A	N/A

3. Town Centre Maps (see Appendices)



© Crown copyright and database rights 2020 Ordnance Survey 100023344 EUL. You are permitted to use this data solely to enable you to respond to, or interact with, the organisation that provided you with the data. You are not permitted to copy, sub-licence, distribute or sell any of this data to third parties in any form. © Hawlfraint y Goron a hawliau cronfa ddata 2020 Arolwg Ordans 100023344 EUL. Rhoddir trwydded ddirymiadwy, anghyfnygedig a heb freindal i chi i weld y data trwyddedig at ddbenon anfasnachol am y cyfnod y mae ar gael gan Cyngor Sir Penfro Ni chewch gopio, is-drwyddedu, dosbarthu na gwerthu unrhyw ran o'r data hwn i ddyddid partion mewn unrhyw ffurf.



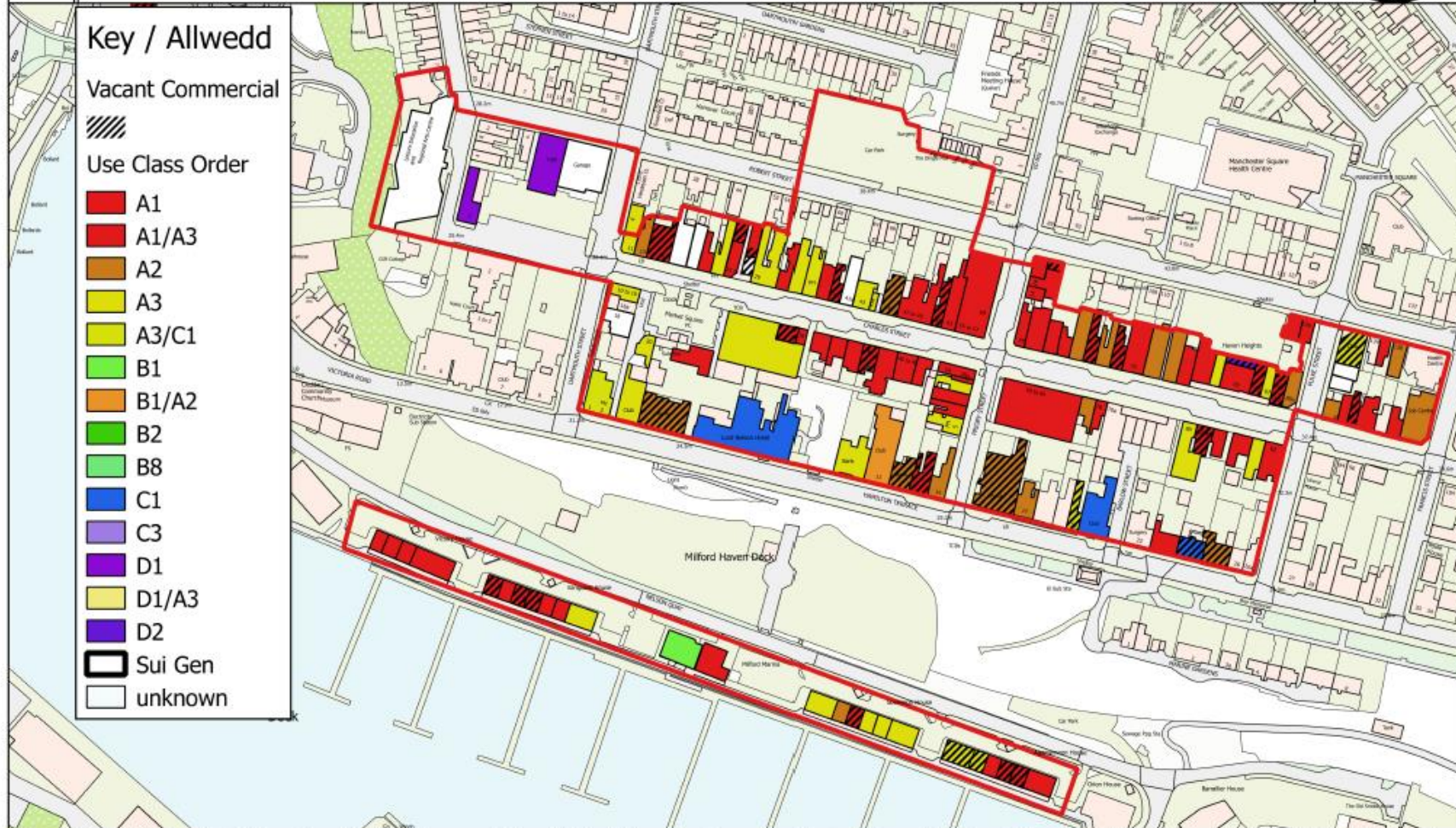
Key / Allwedd

Vacant Commercial



Use Class Order

- A1
- A1/A3
- A2
- A3
- A3/C1
- B1
- B1/A2
- B2
- B8
- C1
- C3
- D1
- D1/A3
- D2
- Sui Gen
- unknown



© Crown copyright and database rights 2020 Ordnance Survey 100023344 EUL. You are permitted to use this data solely to enable you to respond to, or interact with, the organisation that provided you with the data. You are not permitted to copy, sub-licence, distribute or sell any of this data to third parties in any form. © Hawlfraint y Goron a hawliau cronfa ddata 2020 Arolwg Ordians 100023344 EUL. Rhoddir trwydded ddrymiadwy, anghyfyngedig a heb freindal i chi i weld y data trwyddedig at ddibenion arfasnachol am y cyfnod y mae ar gael gan Cyngor Sir Penfro Ni chechw gopïo, is-dryddedu, dosbarthu na gwerthu unrhyw ran o'r data hwn i drydydd partion mewn unrhyw ffurf.



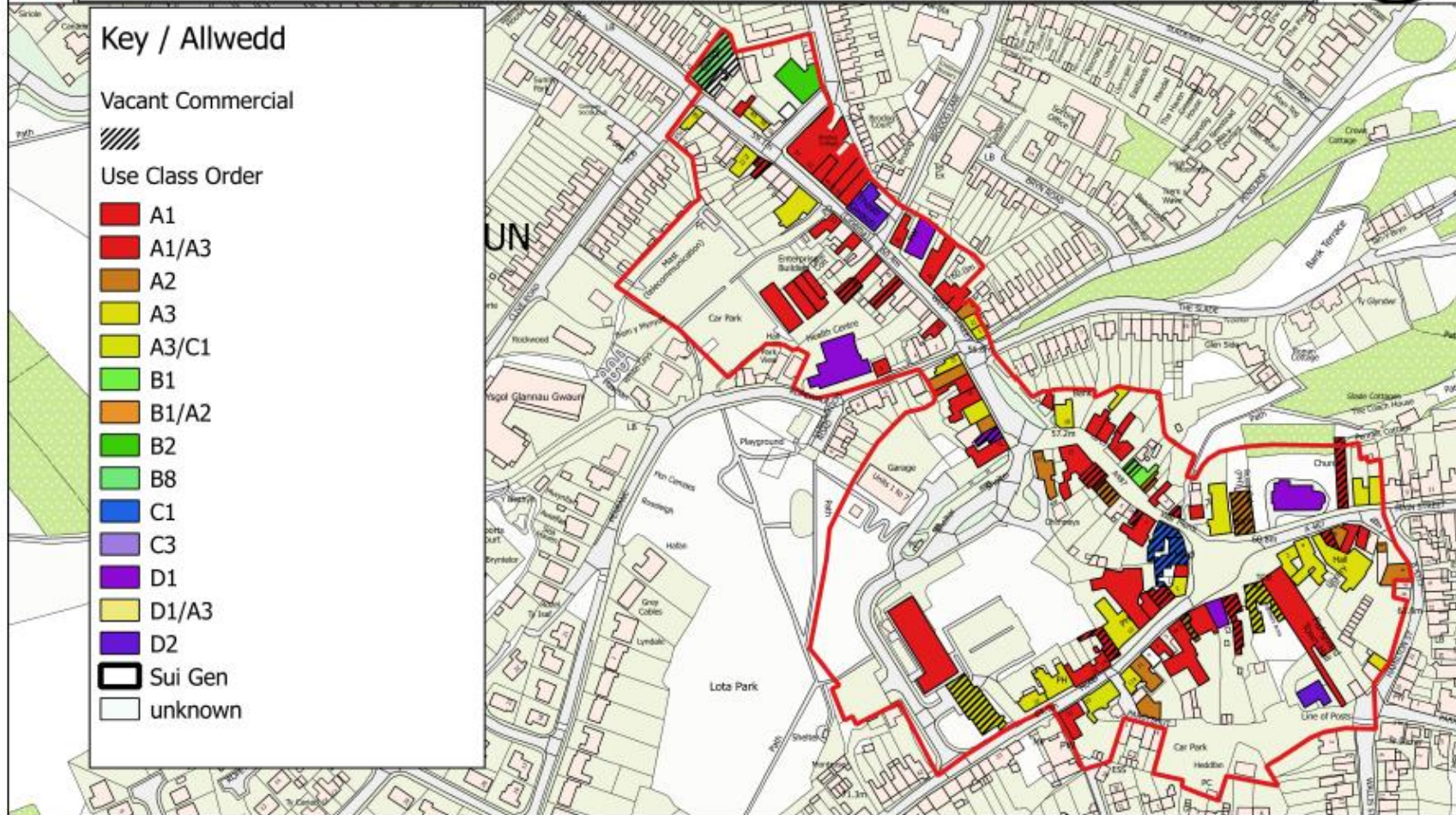
Key / Allwedd

Vacant Commercial



Use Class Order

- A1
- A1/A3
- A2
- A3
- A3/C1
- B1
- B1/A2
- B2
- B8
- C1
- C3
- D1
- D1/A3
- D2
- Sui Gen
- unknown



© Crown copyright and database rights 2020 Ordnance Survey 100023344 EUL. You are permitted to use this data solely to enable you to respond to, or interact with, the organisation that provided you with the data. You are not permitted to copy, sub-licence, distribute or sell any of this data to third parties in any form. © Hawlfraint y Goron a hawlau cronfa ddata 2020 Arolwg Ordnans 100023344 EUL. Rhoddi trwydded ddinymadwy, anghyfngedig a heb freindal i chi i weld y data trwyddedig at ddibenion anfasnachol am y cyfnod y mae ar gael gan Cyngor Sir Penfro Ni chechw gopïo, is-drydydded, dosbarthu na gwerthu unrhyw ran o'r data hwn i drydydd partion mewn unrhyw ffurfi.



















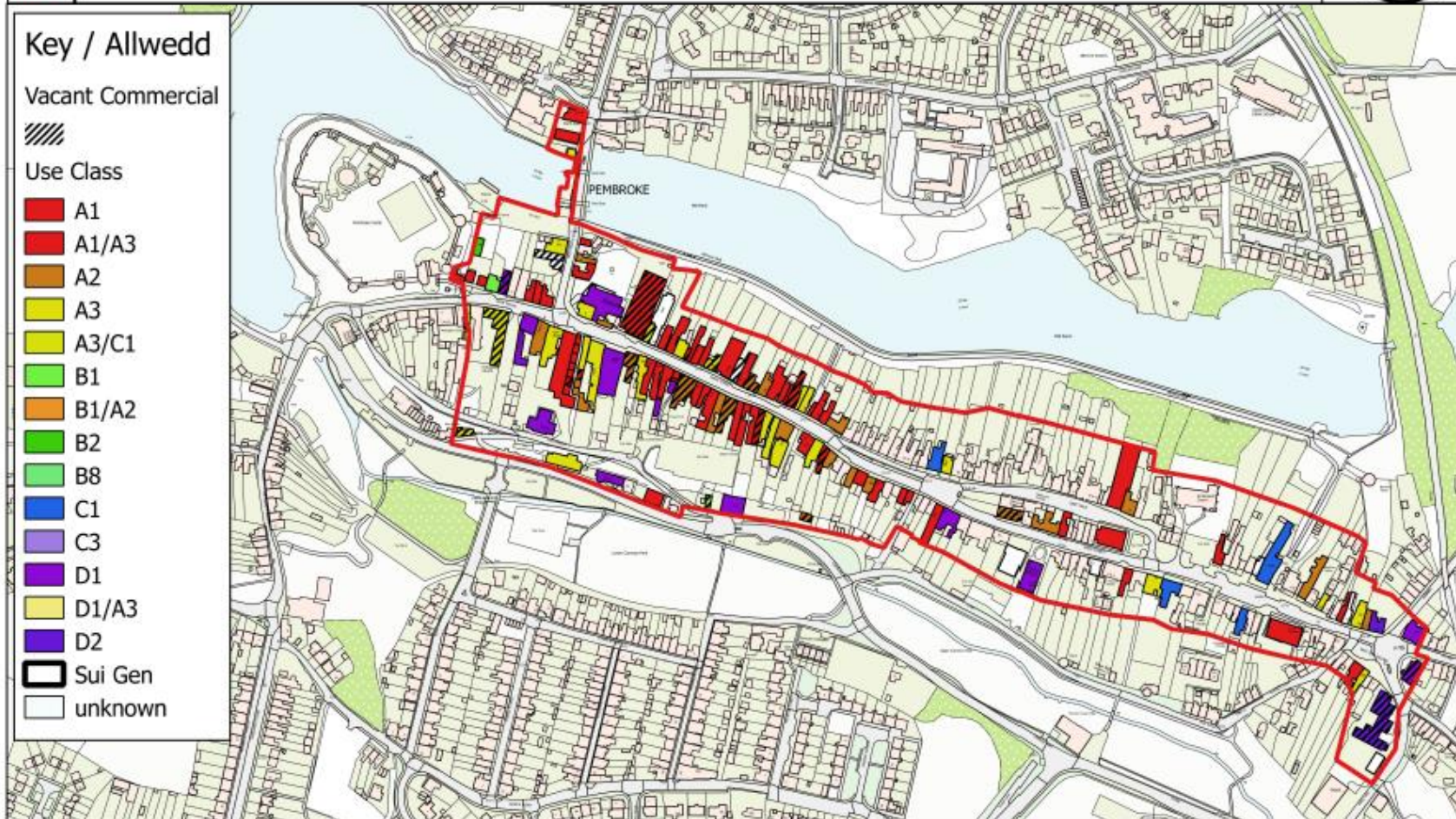
Key / Allwedd

Vacant Commercial



Use Class

-  A1
-  A1/A3
-  A2
-  A3
-  A3/C1
-  B1
-  B1/A2
-  B2
-  B8
-  C1
-  C3
-  D1
-  D1/A3
-  D2
-  Sui Gen
-  unknown



© Crown copyright and database rights 2020 Ordnance Survey 100023344 EUL. You are permitted to use this data solely to enable you to respond to, or interact with, the organisation that provided you with the data. You are not permitted to copy, sub-licence, distribute or sell any of this data to third parties in any form. © Hawlfraint y Goron a hawliau cronfa ddata 2020 Arolwg Ordians 100023344 EUL. Rhoddir trwydded ddrymiadwy, anghyfyngedig a heb frendal i chi i weld y data trwyddedig at ddibenion arfasnachol am y cyfnod y mae ar gael gan Cymgor Sir Penfro Ni chewch gopio, is-drwyddedu, dosbarthu na gwerthu unrhyw ran o'r data hwn i drydydd partion meys unrhyw ffurf.



















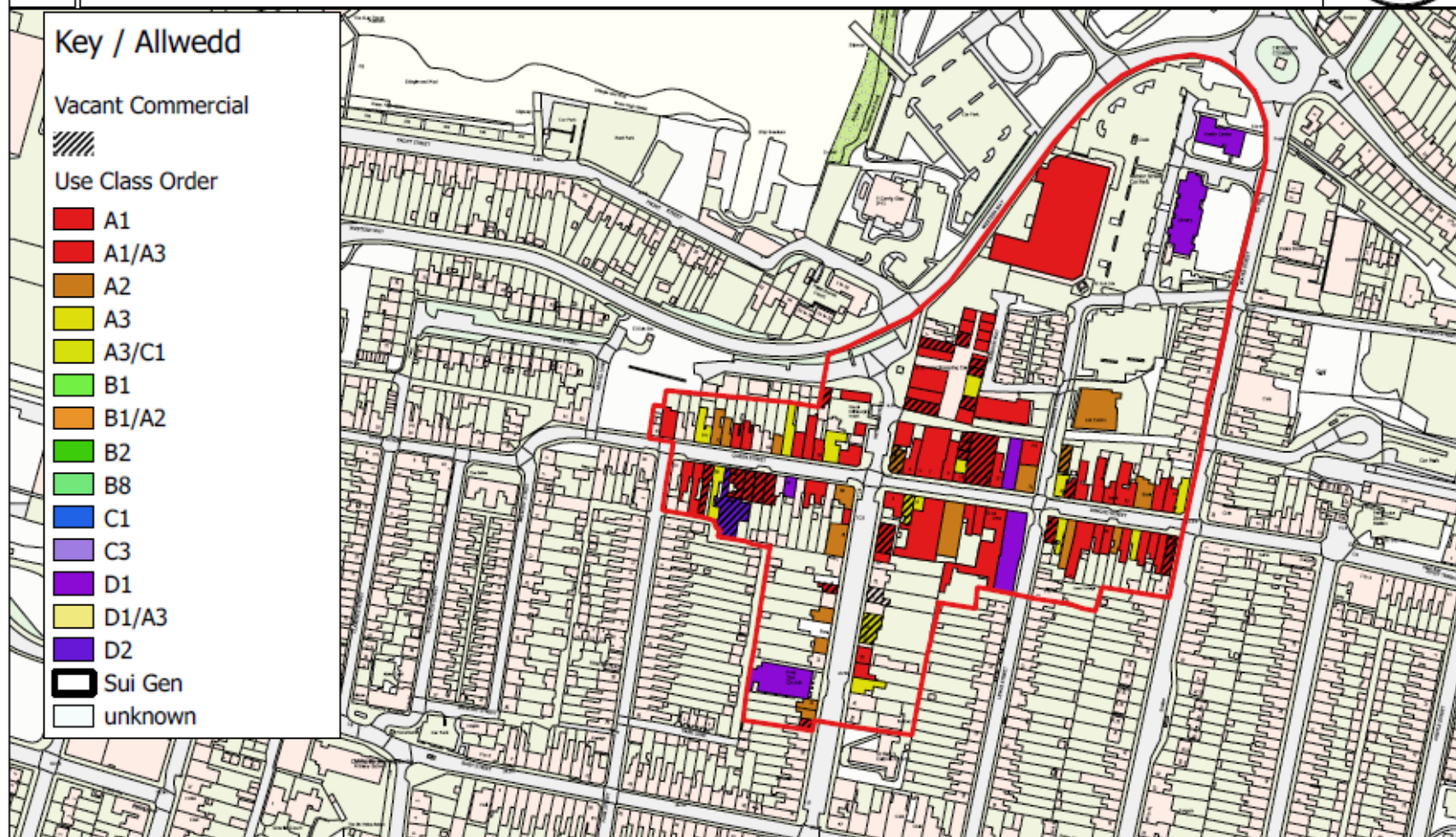
Key / Allwedd

Vacant Commercial



Use Class Order

-  A1
-  A1/A3
-  A2
-  A3
-  A3/C1
-  B1
-  B1/A2
-  B2
-  B8
-  C1
-  C3
-  D1
-  D1/A3
-  D2
-  Sui Gen
-  unknown



© Crown copyright and database rights 2020 Ordnance Survey 100023344 EUL. You are permitted to use this data solely to enable you to respond to, or interact with, the organisation that provided you with the data. You are not permitted to copy, sub-licence, distribute or sell any of this data to third parties in any form. © Hawlfraint y Goron a hawliau cronfa ddata 2020 Arolwg Ordnans 100023344 EUL. Rhoddir trwydded ddirymadwy, anghyfngedig a heb freindal i chi i weld y data trwyddedig at ddibenion anfasnachol am y cyfnod y mae ar gael gan Cyngor Sir Penfro NI chewch gopïo, is-drwyddedu, dosbarthu na gwerthu unrhyw ran o'r data hwn i drydydd partion mewn unrhyw ffur.



Key / Allwedd

Vacant Commerical



Use Class Order

A1

A1/A3

A2

A3

A3/C1

B1

B1/A2

B2

B8

C1

C3

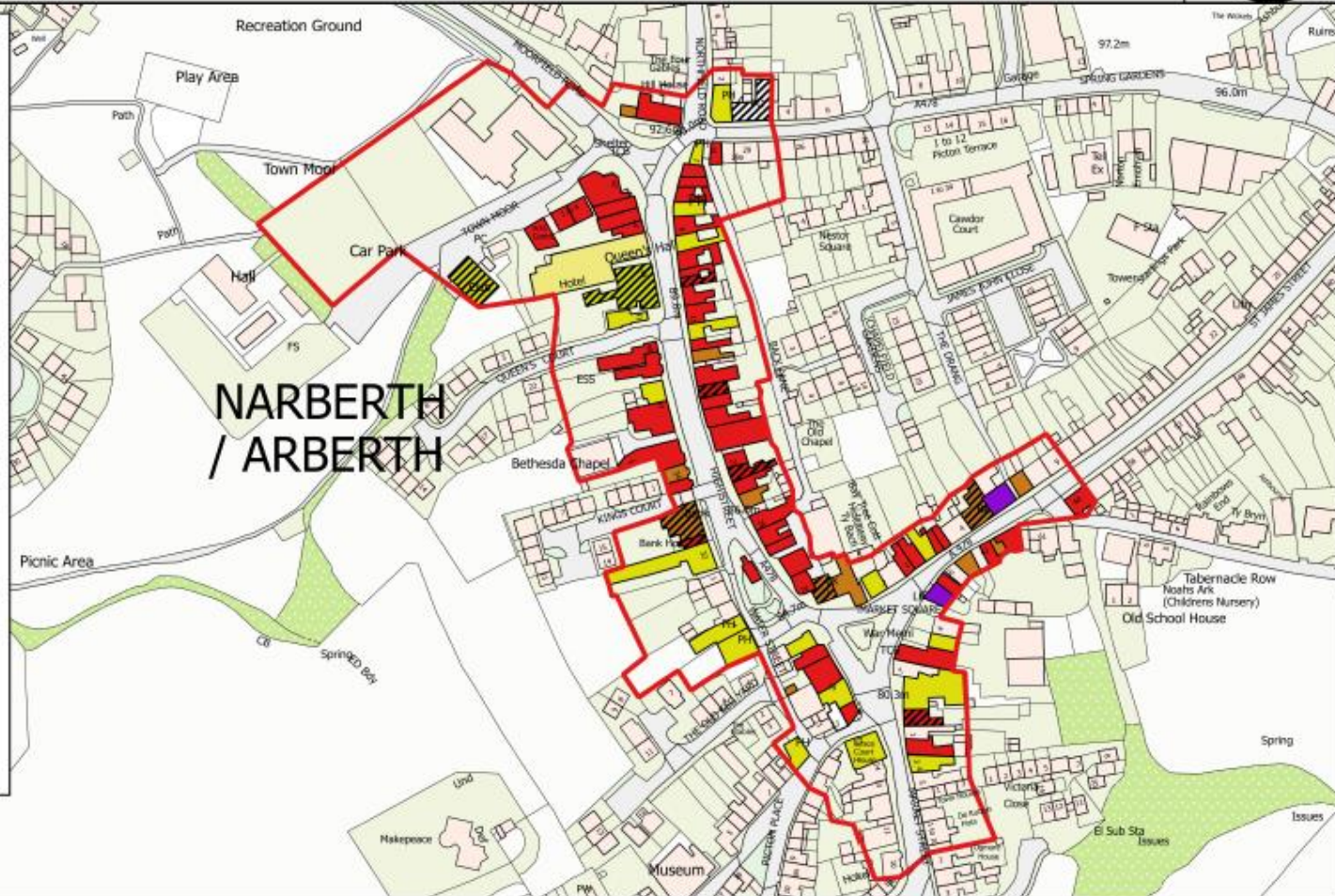
D1

D1/A3

D2

Sui Gen

unknown



© Crown copyright and database rights 2020 Ordnance Survey 100023344 EUL. You are permitted to use this data solely to enable you to respond to, or interact with, the organisation that provided you with the data. You are not permitted to copy, sub-licence, distribute or sell any of this data to third parties in any form. © Hawlfraint y Goron a hawlau cronfa ddata 2020 Arolwg Ordnans 100023344 EUL. Rhoddi trwydded datrymiadwy, anghyfngedig a heb freindal i chi i weld y data trwyddedig at ddibenion anfasnachol am y cyfnod y mae ar gael gan Cyngor Sir Penfro Ni chwech gosio, is-dryddedu, dosbarthu na gwerthu unrhyw ran o'r data hwn i drydydd partion mewn unrhyw ffurf.