

FISHGUARD to  
 Rosslare 4 hrs  
 Rosslare (summer only) 2 hrs

PEMBROKE to  
 Rosslare 4 hrs  
 Cork 9 hrs  
 (4 days per year)

**KEY**

Employment areas 

 Nathaniel Lichfield and Partners

Project	Pembrokeshire Haven Complimentary Study
Title	<b>Figure 7</b> Distribution of employment in Pembrokeshire Haven Spatial Plan Area
Client	Welsh Assembly Government
Date	March 2009
Scale	1:250,000 @ A3
Drawn by	IJ
Drg. No	IL30576-01

---

complementarity. Whilst the role of Neyland and Johnston is more limited, they do complement the larger centres. Indeed, the linked-settlement status of Milford Haven and Neyland means that they could be viewed largely in conjunction with one another.

3.29 These main centres dominate the economy within the Spatial Plan Area and, building upon their existing critical mass of population, employment and economic activity; their economic track record; their reputation as major employment centres; and their potential for further growth in existing and new sectors, will continue to do so.

3.30 Except for its very important gateway role, the Fishguard Hub serves a very limited economic function. It is anticipated that this will continue in the future; only a relatively small number of jobs will be available within the Fishguard Hub which will not be particularly well represented in any of the key sectors (other than transport and communications for which it does serve a significant role) that characterise the Spatial Plan Area. Many of those jobs that are available will be in the non-B Class sectors and the hub's sphere of economic influence will remain limited. However, growth should nevertheless be supported as appropriate. Encouragement of home-working, live-work units and small scale employment facilities may be important in helping to encourage a greater level of local activity and as such, a reduction in out-commuting from the area.

3.31 Recognising that the three hubs do serve different functions provides a basis by which the different roles can be appreciated. The Fishguard Hub acts as a gateway hub and will continue to do so in the long term. This might be promoted by the allocation of land for port-related and spin-off activities which will build upon its important current strengths. Whilst such actions will be important in helping to increase local economic activity and employment, the aspiration for growth must be set within the context of realism. This is that in economic terms, the focus is likely to be upon small-scale local employment, the protection and enhancement of the local port function and the enhancement of good links with Haverfordwest and the other Haven Towns in order to ensure that residents of the hub can access employment opportunities.

### **Major economic sectors**

3.32 Within the Spatial Plan Area, the following key economic activities are likely to be particularly important.

3.33 **Public sector** activities will continue to be fundamental to the local economy. As the county towns, Haverfordwest and Carmarthen will continue to serve as the main locations for activity although it is unlikely that the County Council functions would increase substantially in the future. However, drawing upon the existing presence of some Welsh Assembly and Central Government functions within the Spatial Plan Area (in Carmarthen and Pembroke Dock), the opportunity does exist to seek to attract additional functions. Given their

---

importance as public sector and commercial locations, Carmarthen, Haverfordwest and Pembroke Dock all have the capacity to be attractive to government departments.

- 3.34 It is expected that public sector activities will therefore continue to represent a central component of the local economy within the Spatial Plan Area. These will comprise County, Welsh Assembly and (increasingly) Central Government functions and will be principally concentrated within Haverfordwest and Carmarthen and, to a lesser extent, Pembroke Dock.
- 3.35 The **energy sector** is already very well developed within the Spatial Plan Area and it is expected that it will expand further and diversify in the future. In view of the substantial level of development and investment that is required to support this sector, it is anticipated that the focus of operations will remain within the Milford Haven waterway. This concentration provides the opportunity to strengthen the existing role of the two main centres (Milford Haven and Pembroke Dock) and other areas in the waterway and to increase their complementarity with Haverfordwest which does not (and is not expected to) serve any role as a location for energy-related activities. Drawing upon the success of the Milford Haven waterway in developing a strong energy function, the opportunity may also exist for the development of green technologies. This might be associated with existing opportunities or might include new activities such as tidal or wind power and research into other renewables. Whilst the concentration of such heavier activities into a relatively small area can deliver important environmental benefits by relieving pressure for activity in other parts of the Spatial Plan Area, consideration should be given to the potential implications in terms of local capacity for development, transport facilities and the presence of other local constraints.
- 3.36 Given its location at the far west of Wales, the **transport and communications** sector is important and is particularly related to the ports at Milford Haven, Pembroke Dock and Fishguard (which is located at Goodwick). Whilst the specific function of these ports and their relative significance within the individual settlements varies, it is nevertheless self-evident that they are very important in strengthening the local economy and in facilitating the role of the Spatial Plan Area as a key gateway into the Republic of Ireland. The importance of these deep water ports and associated energy installations mean that these settlements serve a very important role, not just in the Spatial Plan Area but also in Wales and the UK as a whole. This should be celebrated and built upon as a basis by which the economic function of the Spatial Plan Area might be more widely recognised, promoted and enhanced. Given that there are no known proposals either to close these ports or to develop new ports elsewhere, the distribution of this sector is not expected to change. However, there are opportunities to enhance the role and function of the different ports –in respect of their contribution to the energy sector or their freight, passenger or cruise liner capacity. To this end, it is noted that work is being undertaken in respect of the potential reconfiguration and an increase in capacity of Fishguard port. In addition to seeking to increase the capacity of the ports (as appropriate),

---

consideration should also be given to the potential to encourage associated activities which could not be undertaken elsewhere in the Spatial Plan Area. For example, building upon current economic activity in the area of boat maintenance and repairs, together with some small-scale boat building would relate very well to the port functions and would help to stimulate the economy within each of these port locations.

3.37 Although the port activities dominate the transport and communications sector, consideration should also be given to the potential long term role of Withybush airport. At present, this is categorised as a sub-regional aerodrome. It would need to be upgraded to an approved air traffic control aerodrome to accommodate scheduled flights but consideration could be given to potential level of market interest in this in the future, recognising the direct and indirect economic consequences of this.

3.38 Although **business activities** have been particularly hard hit by the current recession and whilst the Spatial Plan Area is not expected to develop into a dominant location for business services, it is considered that there is scope for the further development of such functions, building particularly upon the level of activity that has already been developed within Haverfordwest and Carmarthen. These would principally serve the local market although increases in population and business activity would be likely to stimulate further demand for such services whilst IT developments increasingly allow for business activities to be undertaken away from the main corporate centres. In the light of this, the opportunities exist to seek to attract a business service sector within the Spatial Plan Area on the basis that people can undertake their existing work whilst also enjoying the quality of life that is available in the local area.

3.39 This sector also includes **research and development and high technology activities**. These are closely linked to the energy sector and it is anticipated that Milford Haven and Pembroke Dock will serve an important role in these activities in the future. Whilst these might be combined within the energy installations, the recent development of a Technium and associated science park facility at Pembroke Dock provides a further opportunity for the promotion of other research and development and high technology activities. In addition, the longer term opportunity exists for Carmarthen and Haverfordwest to develop a role as high technology centres. This would not be related to the energy sector but rather would build upon their strength as commercial and administrative centres and Carmarthen's status as a Knowledge Economy Centre (as identified in the Wales Spatial Plan) and the potential to link growth in this area to the operations at Withybush airport. Opportunities for medical-related research might also exist within the hospitals in each town. The promotion of this sector would be important in helping to achieve the vision for the Spatial Plan Area whilst the distribution of different types of research and development and high technology activities within the four Primary Key Settlements would help to enhance the level of complementarity between the towns and the hubs and would also help to increase the overall capacity of the Spatial Plan Area for this type of activity.

---


3.40 Although **agriculture** is a small-scale sector in terms of the overall number of people that are employed, particularly when compared to other economic sectors, it is nevertheless a very important component of the rural economy. In addition to providing a source of employment outside of the key settlements, agriculture also performs an important role in respect of environmental management and enhancement. It also offers considerable potential for the development of complementary relationships with other associated sectors and between different areas within the Spatial Plan Area. In addition to the processes directly associated with agriculture, the opportunity exists for spin-offs into other sectors such as manufacturing, processing, tourism and distribution (through markets, shops or direct on-line sales). Some of these associated activities have already been established (for example, cattle markets and local food shopping via [pembrokeshiredirectproduce.org.uk](http://pembrokeshiredirectproduce.org.uk)). These activities provide an important basis by which the benefits associated with the agricultural sector might be increased. In order to realise this opportunity, it will be important to ensure that agriculture is given a greater level of support in the future and that any leakages of income or investment that are presently resulting from processing or distribution activities being undertaken elsewhere might be addressed. The development of a stronger role for agriculture will be important in enhancing the rural economy within the Spatial Plan Area and enhancing cross-tier complementary with market (and other) towns.

3.41 In addition, **retail** and **public services** will play an important role within the Primary Key (and other) Settlements as will (albeit to a lower degree) **tourism**. The future of these sectors is considered separately below although the fact that they all act as important sources of local employment, highlights the overlapping nature of economic and employment issues and the extent to which a consideration of it is complementary with a review of other key sectors and activities.

### **Conclusion**

3.42 The strong economic role of the Primary Key centres will continue to be central to the achievement of the vision for the Spatial Plan Area and a complementarity can be seen in their roles and performance. These settlements have the best prospect of attracting and retaining the diversity and strength that the Wales Spatial Plan seeks. The reality is that the other settlements will not perform such a substantial employment function – either in terms of the number of jobs available or the types of activities that are undertaken. However, the smaller settlements do make an existing contribution to the local economy and will continue to do so in the future – serving some of the employment needs and service requirements of the local community. It is not expected that they would be particularly dominant in the key sectors set out above (although small scale employment units and working from home initiatives might help to increase their representation in some sectors) but rather that employment would be predominantly focused upon non-B Class activities such as agriculture and tourism. In smaller settlements, the focus

Future Locations - Employment

Existing Role 


Settlement Links 



Figure 8

---

should therefore be upon the promotion of existing sectors and the promotion of value-added spin off activities – for example, agriculture in Newcastle Emlyn, tourism in Tenby and speciality retailing in Narberth.

3.43 In summary, future complementarity in respect of the local economy and employment will be focused upon the strengthening and diversification of the Primary Key Settlements with representation in the following sectors:

a Public Sector – Carmarthen, Haverfordwest and Pembroke Dock;

b Energy Sector – Milford Haven and Pembroke Dock;

c Transport and Communications – Milford Haven, Pembroke Dock, Goodwick (Primary Settlement) and Haverfordwest;

d Business Services – Carmarthen and Haverfordwest;

e Research and Development / High Technology – Milford Haven, Pembroke Dock, Carmarthen and Haverfordwest; and,

f Agriculture – smaller settlements and rural areas.

3.44 These centres will be supported by other settlements which will perform a smaller scale and more localised economic function. In that their economic role will support local communities and will add local robustness and sustainability to the local economy, they will complement the main centres and will therefore help to provide progress towards the vision for the Spatial Plan Area.

## **Tourism**

3.45 Tourism is a major economic activity which performs an important role within the Spatial Plan Area. Its significance in underpinning the strength of the area is recognised by the Wales Spatial Plan's Vision for the Area. Looking forwards, it will be important to continue to support and promote tourism activities within the Spatial Plan Area. However, recognising that the main appeal of the area to visitors is related to its natural environment, it is particularly important to ensure that complementarity can be achieved between the needs of the environment and of the tourism sector. This will necessitate a balance between the levels of growth that are associated with the promotion of tourism and the protection of the natural environment. A failure to achieve this balance might result in the degradation of the quality of the local area and hence, an undermining of the area's main visitor attraction. Conversely, the quality of the environment can represent an inhibitor of the level of growth that could theoretically happen in the tourism sector. It is also important to ensure that sufficient capacity is provided to meet the needs of visitors to the area and to reduce the seasonality of tourism activities within the Spatial Plan Area.

3.46 The importance of protecting the environment and promoting it as a facilitator of (but recognised constraint upon) tourism development is vital to ensuring a

---

balanced approach. This points to a potential conflict which can best be addressed by seeking to focus on quality and value rather than just upon quantity. This will entail the encouragement of year-round, higher income and better quality forms of tourism rather than merely concentrating upon the number of visitors.

- 3.47 The evidence report has shown that the popularity of the Spatial Plan Area is linked to the quality of the coastline, the beaches and the natural environment rather than to the range of facilities that are available within the main settlements. This is important in explaining the pattern of tourism activity across the area. All of the evidence relating to the tourism sector within the Pembrokeshire – The Haven Spatial Plan Area highlights the particular dominance of the Coastal Corridor as the primary focus of tourist activity. Tenby and Saundersfoot can be viewed as the heart of this corridor and, although they are not defined by the Wales Spatial Plan as such, they effectively serve as a tourism “hub”. It is expected that, despite the limited size of these linked settlements, this role will continue in the future and that they will continue to be the most popular and significant tourist destinations within the Spatial Plan Area. In preparing strategies and policies for the long term promotion of Pembrokeshire – The Haven, the Welsh Assembly Government, Pembrokeshire County Council and Pembrokeshire Coastal National Park Authority should reflect upon this existing role and should consider the ways in which Tenby and Saundersfoot might be better promoted and developed as an even more sustainable and successful tourism hub. Particular consideration should be given to ways in which the quality of the tourism offer might be further enhanced; the attractiveness of the hub in shoulder and off-peak seasons might be increased; and (as appropriate) the range of tourism facilities and opportunities might be expanded.
- 3.48 The role of the main tourism hub of Tenby and Saundersfoot should be complemented by the other settlements within the Coastal Corridor. Although smaller in scale, Pendine and Laugharne serve an important tourism role which should be supported and further developed in the future. Connections with other coastal centres in the adjoining Swansea Bay Spatial Plan Area and along the north Pembrokeshire Coast should also be acknowledged and promoted. This will be important in increasing their role as tourism settlements, in ensuring that they can better complement the key tourism role of Tenby and Saundersfoot and, as such, in strengthening the Coastal Corridor as the key focus of tourism activity.
- 3.49 The Coastal Corridor only relates to a relatively small part of the overall coastline of the Spatial Plan Area. Its tourism role should be complemented in the future by the promotion of other coastal settlements in west and north Pembrokeshire. This is presently happening and is particularly evident in terms of the popularity of a number of settlements such as Newport as a tourism location. As within the Coastal Corridor, the continued promotion of coastal villages as small-scale tourist locations will be important in complementing the major resort towns and the tourism hub. The nature of these parts of the



---

Spatial Plan Area and the character of their tourism offer, however, is such that they are not likely to develop a mass tourism function and will therefore not be expected to accommodate such high volumes of visitors as the Coastal Corridor.

- 3.50 The Coastal Corridor acts as the primary tourism area within the Pembrokeshire – The Haven Spatial Plan Area, but is not the only area that serves a tourism function. An appreciation of the significant role of coastal tourism within the Spatial Plan Area should not take place at the expense of a recognition of the role of inland tourism. It will be complemented by the role of other Local, Primary and Primary Key Settlements and by other coastal resorts as well as inland areas. The open countryside, agriculture-related tourism opportunities, botanical gardens, historical and heritage features and walking and activity opportunities all make up a rich and varied inland tourism offer and contribute towards a richer, more diverse, higher value, less seasonal and more complementary tourism product within the Spatial Plan Area.
- 3.51 Complementarity for tourism purposes reflects the range of attractions and opportunities that are available throughout the Spatial Plan Area. In addition to the examples mentioned above, Pembroke already has a significant tourism presence and strong assets in terms of its coastline, historic townscape and town centre and its proximity to Freshwater East. The opportunity therefore exists for it to be further encouraged as a main hub settlement within a (slightly) extended Coastal Corridor. St Davids is already recognised as an important tourism location, drawing upon the popularity of the cathedral and the range of niche retailing and art galleries that have developed. Similarly, the role of Narberth as a niche retailing centre and as the closest settlement to major tourism attractions such as Bluestone and Oakwood has been very important in promoting its status as a tourism destination and its ability to complement the Coastal Corridor and the tourism hub.
- 3.52 Whilst there are a limited number of centres that could reasonably be expected to develop a niche retail function and the number of major holiday villages and theme parks that can be sustained within the Spatial Plan Area is similarly restricted, these two examples do show the ways in which the main tourism attraction of the area (the coastline and the natural environment) can be complemented in other ways. In seeking to enhance the tourism economy throughout the year, it will be important to further develop these complementary relationships.
- 3.53 The evidence report cites the findings of the Pembrokeshire Visitor Survey in respect of the key factors that visitors consider to be important to the enjoyment of their holiday in west Wales. The pursuit of outdoor activities was rated highly both as something that they value and something that is best provided in Pembrokeshire. The role of the natural environment and outdoor pursuits is not limited to the coastal area but rather, reflects the high quality of the countryside throughout the Spatial Plan Area. Farm diversification and the development of a range of rural based tourism accommodation and facilities

---

creates a very strong opportunity for the continued development of small-scale tourism facilities in towns and villages throughout Pembrokeshire – The Haven which will serve the needs of visitors, strengthen the economy of the local area and complement the appeal to the larger-scale tourism centres.

3.54 In contrast to other themes that have been considered by this study, the basis of the tourism sector is outside of the three main hubs that have been identified by the Spatial Plan Area. At present, the role of the Primary Key Settlements (with the possible exception of Pembroke) tends to be focused upon serving the needs of local residents rather than visitors and they do not perform a strong tourism function. However, there is an opportunity for the tourism role of the main hub settlements to be promoted so that they might better complement the Coastal Corridor and the tourism hub. In seeking to promote this role and these relationships, particular consideration should be given to the development of the following key elements, as appropriate within the hub settlements. In some cases, this will entail seeking to build further upon existing opportunities and strengths whilst in other areas, a new direction should be sought:

- a Heritage assets;
- b Specific attractions such as museums and galleries;
- c The maritime role of many of the hub settlements;
- d The provision of a range of types of (serviced and non-serviced) accommodation;
- e The availability of a range of cafés, bars and restaurants;
- f The role of Fishguard and Pembroke Dock as gateways to the Republic of Ireland and Carmarthen as a gateway into the Spatial Plan Area; and,
- g The potential for retail and leisure facilities to meet the needs of visitors.

3.55 Given its location, the additional opportunity also exists for Fishguard to serve as a service centre for rural and outdoor-based tourism activities in the wider area in the north of Pembrokeshire.

3.56 The reality is that the tourism role of the hub settlements will be less substantial than that of other centres. However, as shown above, there are considerable opportunities for them to be enhanced and to perform a greater tourism role in the future. Although the main tourism appeal of the Spatial Plan Area is related to the natural environment, the development of a wide range of facilities in these main settlements will be complementary in that they will provide facilities that might be more suitable when the weather is less pleasant, including during the shoulder and off-peak season. As such, this would be important in helping to achieve the tourism objectives for the area.



Figure 9

---

## **Conclusion**

- 3.57 In summary, the key role of tourism within the Spatial Plan Area will continue to be served by the Coastal Corridor and, in particular, the tourism hub of Tenby and Saundersfoot. However, it is important that coastal tourism should be complemented by inland tourism and that the role of the Coastal Corridor is complemented by an increased role of other Local, Primary and Primary Key settlements throughout the Spatial Plan Area which are able to provide a more diverse tourism offer, thereby enhancing the overall appeal of the Spatial Plan Area. The priority for development should be those settlements that are identified by the Wales Spatial Plan as having a tourism focus, although it should be recognised that smaller settlements (not identified by the Wales Spatial Plan) also have the capacity to serve an important and complementary tourism role that should be promoted.
- 3.58 The range of tourism facilities should also be complementary in that they relate to the natural environment (coastline and countryside) and outdoor activities in the first instance but that these are complemented by a wider range of heritage, leisure, maritime and food and drink activities, as well as by a smaller number of major attractions which would offer a range of facilities during period bad weather, including the off-peak season. Similarly, the range of tourism accommodation should be complementary, including catered and self catering facilities that serve the various needs of different types of visitor in terms of their location, type and cost.
- 3.59 There are important synergies between the tourism offer and the retail and leisure offer in that the role – particularly of the Primary Key Settlements – as centres of retail and leisure activity can be important in serving visitors as well as the local community. This will provide an important basis by which the tourism functions of the larger settlements might be enhanced: people might travel into the main settlements because of their retail or leisure functions but might then decide to stay and enjoy some of the other tourist attractions and facilities that are available.
- 3.60 In the future, it is anticipated that the tourism offer within the Pembrokeshire – The Haven Spatial Plan Area will be more diverse and that it will attract a wider range of visitors throughout the year, albeit that it will remain centrally rooted in the existing core elements of the high quality natural environment and coastline and the particular dominance of the Coastal Corridor as the main tourism hub. Given that the natural environment is both a facilitator of, and potential constraint to tourism growth, consideration must be given to the ways in which the quality and value of tourism might be promoted, rather than focusing solely upon the quantity or provision or the number of visitors.

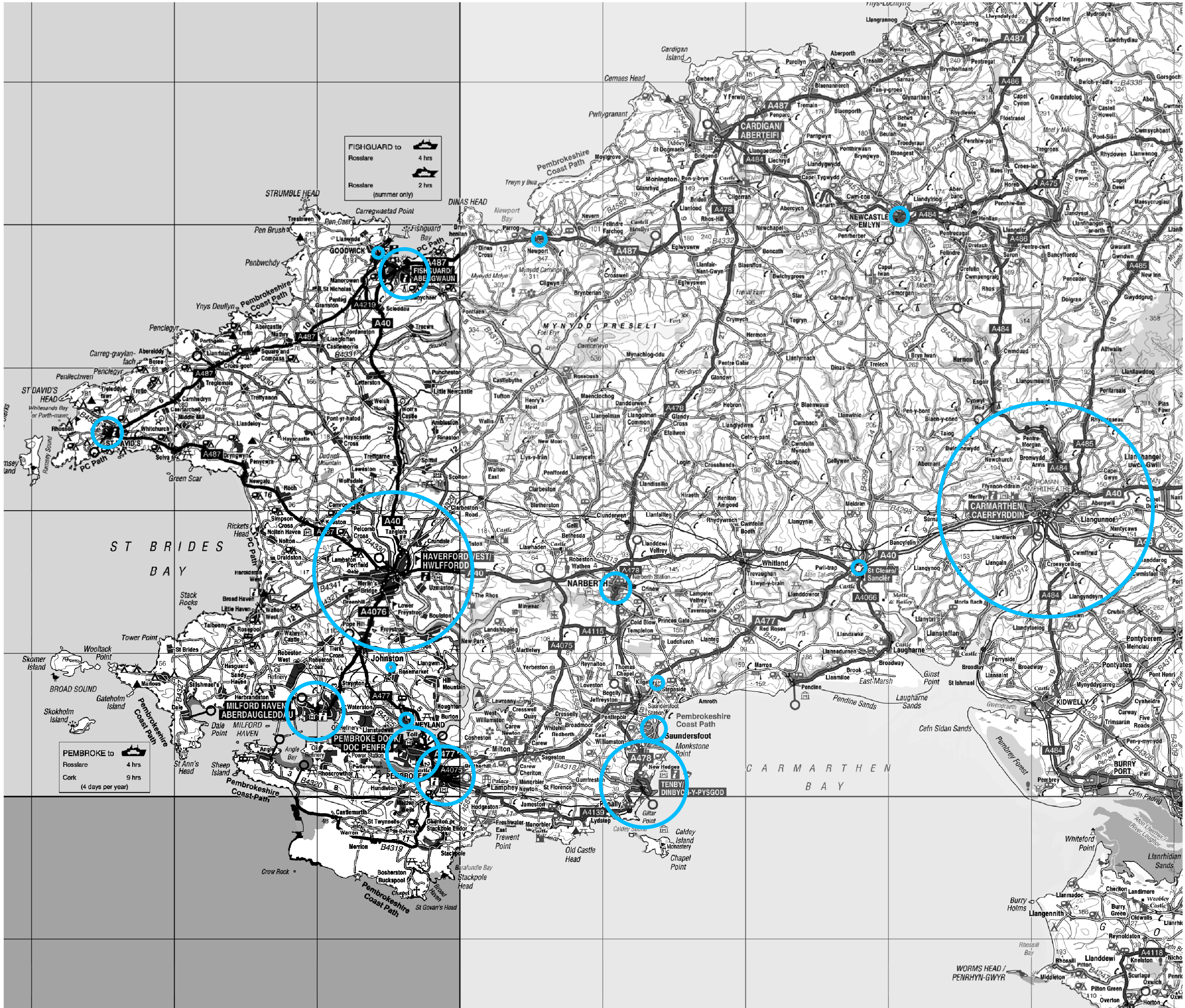
## **Retail**

- 3.61 To achieve complementarity in retail, the ideal for the Spatial Plan Area would be to provide a few strong main town centres with a firm convenience and comparison retail offer supported by a series of sustainable local centres able

---

to meet the needs of the local populations on a day to day basis. Residents would also be able to complete regular shopping trips such as food shopping within a short distance of their homes.

- 3.62 In reality, the Spatial Plan Area has two main retail centres: Carmarthen and Haverfordwest. In terms of retail offer, Carmarthen is a larger centre and performs a regional role serving the Spatial Plan Area and retaining a high percentage of both convenience and comparison goods expenditure. The centre also acts as a draw from those surrounding areas including the Central Wales and Swansea Bay Spatial Plan Areas.
- 3.63 Carmarthen is also set to improve its retail offer with the opening of St Catherine's Walk in the town centre. This development, anchored by Debenhams, will provide 24 new shop/restaurant units set to include Next, River Island, HMV, Frankie & Benny's and Starbucks. This development will ensure the appeal of Carmarthen as a retail centre is enhanced and maintained and will help in attracting future investment.
- 3.64 However, the on-going success of Carmarthen can be perceived as a threat to Haverfordwest and to the high level of complementarity that presently exists between the two towns. Haverfordwest is both Pembrokeshire's and the Haven Towns Hub's main retail and service centre and is the only centre comparable to Carmarthen. It is considered to be relatively healthy and vibrant with a reasonably good retail offer. This offer has recently been enhanced by the arrival of Laura Ashley and Next at the Withybush Retail Park and the decision of Marks and Spencer also to open a store in this location. The fact that these retailers have decided to locate in the retail park rather than the town centre reflects the nature of each centre but might represent a potential threat to the vitality of the town centre. In spite of these new store openings, it is still considered that Haverfordwest is underperforming in the context of its role as Pembrokeshire's main retail and service centre particularly in comparison to Carmarthen.
- 3.65 Whilst it is recognised that the centre will not serve an equal role to Carmarthen, it is important that the opportunity is taken to enhance its retail offer, quality and attractiveness so that it is able to maintain the existing complementary relationship with the improved Carmarthen – this will entail improvements in its offer and physical quality in order to maintain its profile as the largest and most important centre in Pembrokeshire. Rather than necessitating a cap on the potential expansion of Carmarthen, this should be set in the context of on-going improvements to and investment in Haverfordwest. This will necessitate the establishment of specific opportunities and strategies, together with the identification of an appropriate land and policy platform for delivery by both the public and the private sectors. As detailed in the Haverfordwest regeneration study, however, constraints within the town centre mean that the development of large scale retail units would be difficult although careful consideration should nevertheless be given to the potential identification of sites to accommodate medium or large footprint stores. In



FISHGUARD to  
 Rosslare 4 hrs  
 Rosslare (summer only) 2 hrs

PEMBROKE to  
 Rosslare 4 hrs  
 Cork 9 hrs  
 (4 days per year)

**KEY**

Retail Floorspace



**nlp** Nathaniel Lichfield and Partners

Project Pembrokeshire Haven Complimentary Study

Title **Figure 10**  
 Retail floor space (m2) in Pembrokeshire Haven Spatial Plan Area

Client Welsh Assembly Government

Date September 2009

Scale 1:250,000 @ A3

Drawn by IJ

Drg. No IL30576-02b



---

addition, enhancement should focus upon the urban realm and the attraction of individual retailers that would provide a range, choice and quality of offer.

- 3.66 These improvements should make Haverfordwest more attractive to local consumers and will help to restrict any loss of expenditure to other centres that are further away. It will also be important in helping the town to perform more strongly as Pembrokeshire's main retail centre and the second largest retail centre in the Spatial Plan Area. To this end, careful consideration should also be given to the enhancement of linkages between the town centre and Withybush Retail Park so that they might be mutually beneficial to the well-being and retail role of the town. This might include physical and functional connections so that they are not viewed separately but rather as forming a united part of the town's overall retail offer,
- 3.67 Within the Haven Towns Hub it is therefore considered necessary to maintain Haverfordwest as the main retail centre and to improve the town centre to encourage both visitors and investors. However, Haverfordwest needs to be supported by the other town centres. Specifically, as the secondary retail centre in Pembrokeshire, Pembroke Dock, is seen as important in its role serving the southern part of the County. However, just as Haverfordwest will not serve an equal role to Carmarthen, neither will Pembroke Dock to Haverfordwest. Its future development (including the retail opportunities that are to come forward as part of the Martello Quays scheme) would provide a firm basis for an improved offer and level of choice for consumers and to better serve the needs of those living in the Spatial Plan Area and further afield.
- 3.68 Pembroke is identified in the Wales Spatial Plan as a linked settlement to Pembroke Dock. Although its overall retail offer is smaller, the town has an important role as a specialist retail centre, linked to its leisure and tourism function. Whilst it is not expected that the town will develop a large-scale 'general' retail function, its role as a district centre will complement its important role as a leisure and tourism centre. Its district centre offer and provision of specialist retail activities will help it to complement the function of other centres in the Haven Towns hub and serves to highlight the level of complementarity between different sectors and activities.
- 3.69 Milford Haven and Neyland have a much more limited role. Whilst food retail provision within the centres is considered important for sustainability and convenience, the comparison offer of Milford Haven is more difficult to maintain. As such, in the shadow of Haverfordwest and Pembroke Dock, the centre is struggling to perform a comparison retail role which is currently dominated by poor quality and value shops. The problem is also exacerbated by a lack of connection between its town centre and the out of centre retail units at Havens Head and the specialist/leisure oriented retail offer of the marina. As such, it has more of a local function in comparison to the stronger surrounding centres. It is anticipated that the town centre, the retail park and the marina – which should be better connected in order to achieve greater benefits – will act as more united yet smaller town centre, serving the day-to-

---

day needs of those living and working in the town, rather than those living elsewhere or the higher order requirements of local residents. This function represents a positive action and a basis by which the town might continue to have a locally significant role. In so doing, this might help to enhance confidence in the town as a location for relevant investment and might therefore provide a basis for its continued physical rejuvenation and functional improvement.

- 3.70 In performing this role, it is important to recognise its importance to the improving Milford Haven and to the long term well being of the Haven Towns hub. Changes in Milford Haven's role, as a housing, leisure and employment location mean that it will continue to have a very significant role in the hub and the wider Spatial Plan Area. This will be supported by its smaller town centre role as well as the leisure-related retail role of the marina. Maximising linkages between the town centre, the retail park and the marina will be vital to realising their advantage to the town.
- 3.71 Recognising this role will thereby provide an important basis for the establishment of a better level of complementarity with Haverfordwest and Pembroke Dock and will also provide the opportunity for the town to focus upon its other substantial strengths. In the light of the close proximity of the Haven Towns, the role of Milford Haven would not have a negative impact upon the needs of the community. Indeed, it is not clear that there would be sufficient capacity to sustain more than two strong main retail centres within the hub and so to pursue such an aspiration might actually be detrimental to complementarity. By contrast, the proposed re-categorisation of Milford Haven as a smaller and more limited town centre would reflect the reality of the local situation and would help to improve levels of complementarity.
- 3.72 The Fishguard Hub has the poorest retail provision within the Spatial Plan Area which is of particular concern given its importance to the north of Pembrokeshire. Most significant is the lack of a large food store within this hub which results in a substantial loss of trade to Haverfordwest and an unsustainable shopping pattern. Planning permission has been granted for a 1,600sqm foodstore at the former Fishguard Junior School. The operator and size of the store is currently unknown.
- 3.73 It is considered that the development of a large foodstore in Fishguard could potentially impact on the centre's comparison offer as less people will travel out of the town for food and therefore are more likely to complete other forms of shopping in the centre. This could therefore have a knock on effect and potentially attract further investment. However, this is dependent on an attractive foodstore being offered which is able to compete with the larger stores of Tesco and Morrisons in Haverfordwest.
- 3.74 Overall, Fishguard needs significant improvement as a retail centre which is able to meet the needs of the local population on a day to day basis particularly given its position as the main town centre for the north of Pembrokeshire, a



**Future Key Locations - Retail**

- Existing Role
- Future Role
- Settlement Links



**Figure 11**

---

role which it is currently unable to fulfil. This would be important in improving its complementarity with the Haven Towns Hub and in contributing towards the vision of the Wales Spatial Plan for a network of strong communities throughout the Spatial Plan Area.

3.75 The other centres within the Spatial Plan Area are considered to have a more local role, supporting the provision of the main town centres. They are not expected to function as main shopping destinations, but as strong local centres able to meet the day to day needs of both residents and visitors. However, some are more effective in this role than others.

3.76 A number of the local centres have developed niche retailing roles such as Narberth and St Davids and to a lesser extent Tenby and Saundersfoot which cater more for visitors (albeit that Tenby also has a broad general retail offer to serve the local population). Some of the local centres are also considered to be more sustainable and self-sufficient than others; for example, Narberth and Newcastle Emlyn which have good convenience and comparison shopping opportunities for local residents. Overall, there is room for improvement in all centres although this should be appropriate to their size and function. It should therefore be recognised that some centres can sustain a level of niche retailing which increases the profile of the settlements above that of the local centre – thereby adding to their ability to complement the larger, “mainstream” retail centres. By contrast, some other settlements can sustain a strong level of locally focused (convenience) retailing which is well suited to meeting the day-to-day needs of the local and surrounding communities, whilst the very smallest settlements could only reasonably be expected to support a very limited retail offer. In the most rural communities, the development of settlement ‘hubs’ which are used to provide a shared approach to the delivery of services and facilities will be important in ensuring an adequate level of critical mass and thereby supporting the sustainability of service provision. In each case, the policy priority should be to allow the settlements to develop their optimum role so that they can support a high quality and attractive range of facilities that encourage potential users and thereby serve a complementary role to the larger, higher order centres.

### **Conclusion**

3.77 Complementarity in respect of retail facilities within the Spatial Plan Area in the future will be rooted in the strength of Carmarthen and Haverfordwest (supported by Pembroke Dock in particular) as the area’s two main centres. Whilst it is acknowledged that Haverfordwest will not serve an equal role to Carmarthen, it is important not to seek to constrain Carmarthen role or function and also to ensure that the retail role of Haverfordwest is enhanced in order that it does not lose ground to Carmarthen or suffer from a loss of complementarity. This is something that would be detrimental to the town and those that visit it for retail purposes.

- 
- 3.78 Within the large Haven Towns Hub, the role of Haverfordwest will be complemented by Pembroke Dock which will also act as a major retail centre, particularly serving communities to the south of the Milford Haven Waterway.
- 3.79 These three main centres will be complemented by a wide range of other centres – within and outside of the hubs. Importantly, an improved convenience provision in Fishguard will enable it to better serve the hub and the communities in north Pembrokeshire, whilst also achieving a greater level of complementarity. Milford Haven will function as a more limited town centre which is primarily a low order convenience centre, serving the day-to-day needs of local residents. This will be supported by retail functions associated with its leisure role. Pembroke will similarly continue to be dominated by its role as a leisure and tourism centre and its retail function is oriented accordingly. Neyland is a linked settlement to Milford Haven but is much smaller in scale and more limited in its retail function, serving only as a local centre. In serving these roles, they will complement the larger centres of Haverfordwest and Pembroke Dock within the Haven Towns Hub, thereby ensuring that local needs can be met but without creating a level of competition within the closely adjoining towns that might otherwise undermine complementarity. Actions should be directed to ensuring that these key roles might be enhanced in the future.
- 3.80 Outside of the hubs, the smaller settlements will also serve an important retail function; some as niche centres, some as centres whose retail offer is principally geared towards the needs of tourists, and some as smaller-scale local centres that serve the day-to-day needs of the local community. In each case, by adequately fulfilling their identified roles, these smaller settlements can complement the established retail function of those higher up the hierarchy and, as such, can contribute towards the vision for the Spatial Plan Area.
- 3.81 Within all settlements, the need for regeneration would provide the key (linked) ingredients that are central to enhancement and to the achievement of improved complementarity:
- a Increased attractiveness to retailers, leading to a better retail offer;
  - b An improved level of quality and appearance;
  - c Increased levels of custom and expenditure and lower levels of retail leakage to other centres;
  - d An increased level of confidence in the town / village as a retail location; and,
  - e A more sustainable local offer which contributes towards the strengthening of the local communities.

---

3.82 These elements are at the heart of the future complementarity of retail centres within the Spatial Plan Area and will be fundamental in ensuring that all centres can fulfil their potential in a complementary and positive manner.

### **Leisure**

3.83 In an area that is dominated by its tourism function, there are important connections between tourism and leisure activities. Many visitors will enjoy leisure facilities whilst on holiday whilst the local population might make use of facilities that are primarily oriented towards tourists. However, for clarity, this section only addresses the following leisure activities which are undertaken by local residents on a fairly regular basis:

- a Cinema;
- b Theatre;
- c Tenpin bowling;
- d Bingo;
- e Pubs, bars and restaurants;
- f Council run leisure centres;
- g Private health and fitness centres; and,
- h Swimming pools.

3.84 Whilst this section considers leisure in this context, it is noteworthy that a considerable range of leisure activities are provided by the natural environment. In addition, as detailed above, the local tourism offer provides further opportunities for leisure that might not otherwise be available in this area.

3.85 Given the sparse and rural nature of the Spatial Plan Area the evidence report shows that existing leisure facilities have quite wide catchment areas and many facilities, such as gyms and leisure centres can be more dependent on other factors such as places of work. Furthermore, given the distribution of the population not all settlements are expected to have an equivalent level of leisure provision as facilities need to remain financially viable, which is a particular issue within this area. The implication of this is that complementarity will be principally rooted in the development of facilities in the main settlements with a more limited provision in the smaller centres to serve local needs.

3.86 In seeking to address existing shortfalls in the level of provision of leisure facilities, consideration should be given to the reality that across the Spatial Plan Area as a whole, there is limited quantitative need for additional leisure facilities other than private health and fitness centres. However, because of the

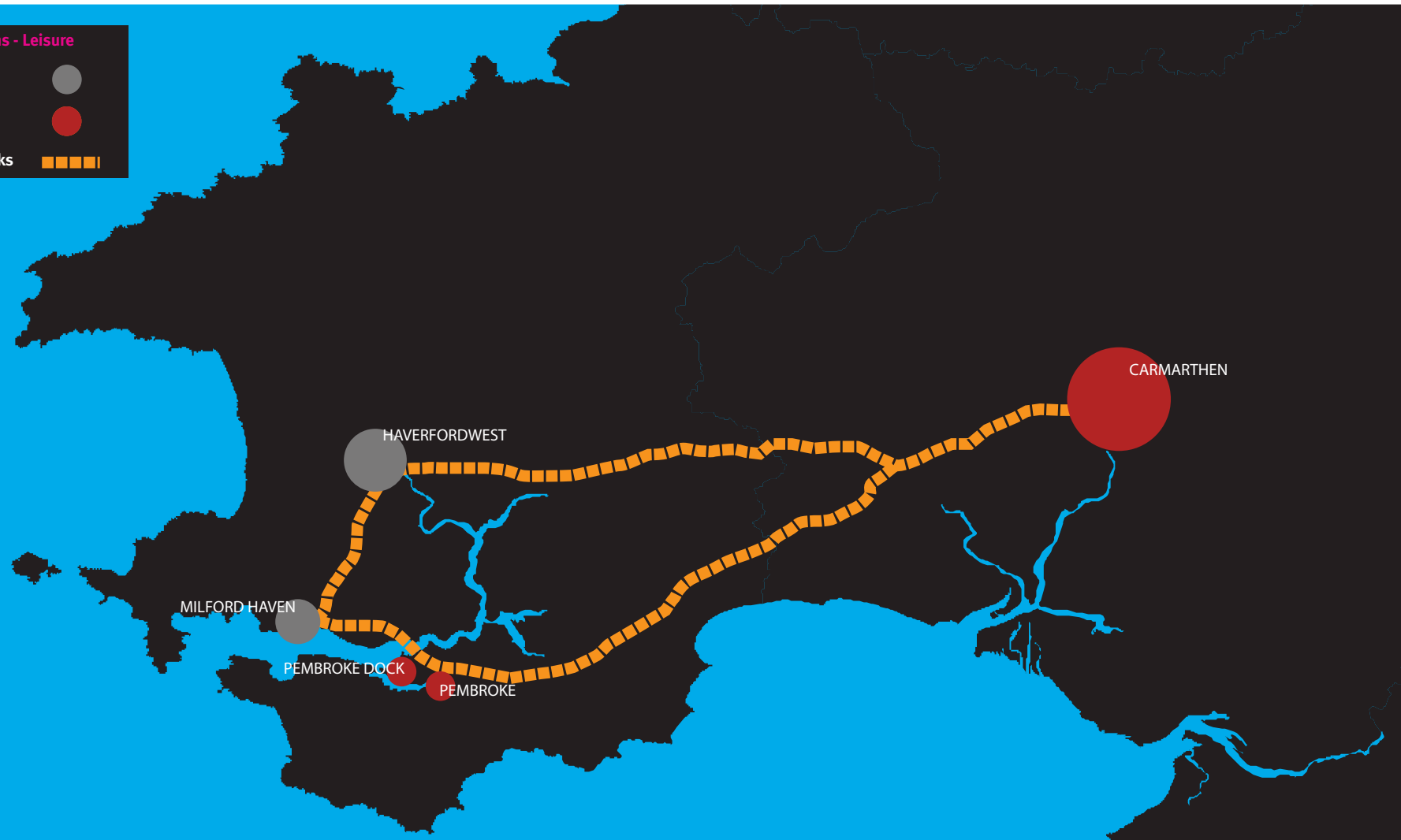
---

distribution of facilities, the (quantitative and qualitative) shortage is more apparent on a more local level. This raises substantial policy issues in respect of the need to enhance the range and quality of provision within individual centres but within the context of an awareness that an overprovision might undermine deliverability and viability in the longer term.

- 3.87 Within the Spatial Plan Area the Haven Towns Hub has the best provision of leisure facilities with Haverfordwest and Milford Haven having the best overall provision of any individual settlements. Most importantly, of the leisure categories considered, the only facility not currently provided within these towns is a casino. In terms of quantitative and qualitative need, the evidence report found that the hub does not immediately require any further facilities to meet local need although there would be potential to provide further private health and fitness facilities if interest was shown by operators and there might be scope for qualitative improvements although this would need to be the subject of a more detailed review.
- 3.88 In terms of the future of complementarity, the Haven Towns Hub is expected to significantly improve its leisure offer in the future. If permitted, the mixed use Martello Quays scheme will provide a multiplex cinema, pub, restaurant and hotel with casino in Pembroke Dock. Another scheme is also believed to be in the pipeline at South Quay in Pembroke although the details are unknown at present. If these are both delivered, they would significantly raise the level and quality of provision within with Haven Towns and would result in the linked settlements of Pembroke and Pembroke Dock becoming a particular hub for leisure activity and would result in the main leisure focus within the Haven Towns Hub shifting to the south of the Milford Haven Waterway. In addition to providing additional leisure opportunities, these schemes would also be important in making greater use of the leisure opportunities that are related to marina and maritime locations. Together with other improvements in the Haven Towns, they would result in the area becoming even more dominant as a focus of leisure activity, both in serving local communities throughout the Spatial Plan Area and also in helping to increase the role of the Hub as a centre for tourism activity.
- 3.89 In relation to its size and importance within the Spatial Plan Area, the Carmarthen Hub presently has a relatively limited range of leisure facilities with no ten-pin bowling, bingo or casino facilities, only one leisure centre and swimming pool and a combined single screen cinema and theatre. It does, however, benefit from a large number of pubs and restaurants and the evidence report acknowledged that an Apollo 7-screen multiplex cinema is proposed in Carmarthen. Given the towns role as a sub-regional centre, this would appear appropriate. However, the range of provision in Carmarthen does not (and in spite of the new cinema, will not) reflect its significance as the largest settlement and the main employment and retail centre within the Spatial Plan Area. Subject to a detailed consideration of capacity and (operator and user) demand, further investment and improvements should be encouraged, to reflect the status and role of the town. This opportunity would be important in ensuring


**Future Locations - Leisure**

- Existing Role
- Future Role
- Settlement Links



**Figure 12**

Future Locations -  
Public Services

Existing Role 


Settlement Links 



Figure 13

---

that Carmarthen is able to complement the improving leisure offer within the Haven Towns Hub and thereby serve the needs of those living in Carmarthen and the wider area in a manner that is commensurate with the role of the town as the largest centre in the Spatial Plan Area. It would also to help to raise the profile of Carmarthen as a visitor centre.

- 3.90 The Fishguard Hub is the least well provided of any of the hubs in terms of leisure facilities with no ten-pin bowling, private health and fitness, bingo or casino facilities and only a combined single screen cinema and theatre and one leisure centre with swimming pool. Fishguard has a reasonable number of pubs and restaurants in relation to its size and availability of other leisure activities but Goodwick has only 2 such facilities. Although there are also no known proposals to improve provision within the hub, significant improvements could and should be made to the existing leisure provision in order to better meet the needs of the north Pembrokeshire population and visitors to the area. Again, this would need to be subject to a detailed review of capacity, demand and viability although it is considered that a private health club could particularly be supported in this area. As with its retail role, it is anticipated that the offer in the Fishguard Hub would remain substantially more limited than that of the Haven Towns Hub although improvements should be sought so that it might be able to better serve the needs of the local community and thereby fulfil a more complementary role in respect of its leisure offer in the longer term.
- 3.91 The leisure provision of the other settlements within the Spatial Plan Area varies with Narberth and Tenby perceived to have the strongest leisure offer of the smaller centres. St Davids has a relatively limited range of facilities given its importance as a tourist destination. Most notable is its limited range of pubs and restaurants. This relatively limited provision would be exacerbated by the proposed closure of the local swimming pool.
- 3.92 The worst provision is considered to be in Whitland, Johnston, Kilgetty, Pendine, Laugharne, Letterston and Newport due to the fact that they only offer a small number of pubs and restaurants and no other facilities. However, given the size of these centres this is unsurprising as facilities are unlikely to be financially viable. The leisure aspirations of residents are therefore met by the nearby larger centres of the Spatial Plan Area and it is not considered that further improvements in the level of local provision should be sought. In this regard, the development of complementarity should be viewed as a function of ensuring that reasonable levels of accessibility to leisure facilities can be achieved rather than seeking to deliver a full range of facilities within every village.

### **Conclusion**

- 3.93 Overall, the complementarity of leisure facilities to the south of the Spatial Plan Area (and particularly within the Haven Towns Hub) is good and is set to improve with the planned developments in Carmarthen and Pembroke Dock and the potential development at Pembroke. If the emerging plans are approved,



---

there will be a shift in the focus of leisure activities with Pembroke Dock and Pembroke becoming more dominant within the Haven Towns Hub and the Spatial Plan Area generally.

3.94 Whilst the new development in Carmarthen will improve the level and quality of provision, it is not considered that this will be sufficient to reflect its dominant role within the Spatial Plan Area. Further improvements would help to reflect the status of the town as a key location for leisure facilities and would increase its complementarity with the Haven Towns.

3.95 The level of leisure provision is least well developed in the north of the Spatial Plan Area, an area that is significantly let down by the Fishguard Hub. The lack of provision within this hub is further compounded by the fact that neighbouring centre, Cardigan, also has a relatively weak leisure offer. The consequence of the limited provision within Fishguard and Goodwick is that local residents are being forced to travel further than strictly necessary to undertake leisure activities. In order to address this shortfall new leisure facilities should (if financially viable) be directed towards the north of the Spatial Plan Area, albeit reflecting that the focus of complementarity will remain upon the Haven Towns Hub and (increasingly with appropriate investment) Carmarthen with other, smaller centres serving a supportive role as appropriate. In this context, the key to complementarity will be to ensure that all of the facilities that are provided are of a very high standard and are able to meet the needs of their users and that they can be accessed by a variety of modes of transport with relative ease by all members of the different communities across the Spatial Plan Area.

## **Public Services**

### **Health**

3.96 To achieve complementarity with regards to general health care services, the ideal for the Spatial Plan Area would be to provide primary care facilities at the local community / neighbourhood level across the Spatial Plan Area which can then be supported by secondary care services within all Primary Key Settlements and some Key Settlements. This would provide all members of the population with convenient access to a GP surgery which can then refer a patient to a more specialist service within a health clinic or hospital if necessary.

3.97 The evidence report has shown that provision of GP surgeries in terms of volume in the Spatial Plan Area is strong in comparison to the Welsh average although there are a few local centres, (including Pendine, Letterston and Laugharne) that do not have a local GP surgery. The nearest NHS GP to Pendine and Laugharne is located in St Clears, Whitland or Kilgetty and drive time from Pendine is longest at approximately 20 minutes. Letterston has reasonable access to Fishguard in under 10 minutes drive time. It might be possible to consider necessary improvements to the local provision of GP surgeries (particularly in the settlements set out above that are presently under-provided)

---

so that the objective of complementarity might be achieved in respect of GP facilities throughout the Spatial Plan Area.

- 3.98 Access to an Accident and Emergency service is also a fundamental aspect of health care provision. Whilst it is not practical to provide a large A&E hospital facility within all Key or Local Settlements, those areas not within a reasonable driving time (between 15-20 minutes) of an A&E facility should be able to be reached by the emergency services within a similar response time. The expansion of the co-responder units, which provide fire stations with resuscitation equipment and emergency medical training to provide back up to the Welsh Ambulance Service, could help to improve primary response times in some of the most rural locations. The continued development of this important service represents an important opportunity by which the needs of the rural communities for emergency services might be improved, thereby enhancing the complementarity of provision within the Spatial Plan Area.
- 3.99 In terms of other primary care services such as dentistry, ophthalmic and pharmaceutical services, it would be acceptable for the provision of these services to be restricted to being located within Primary Key Settlements and Key Settlements due to the lower frequency of visits that occur compared with GP surgeries and general health clinics. However, as the smaller local centres are not expected to perform a complementary role in respect of the provision of these facilities, the need for good access to such services is even more important, particularly for the elderly or those who are reliant on public transport. To this end, there is a particular need to address the existing shortage in the provision of NHS dentists within the Spatial Plan Area and also to encourage a broadening of the role of pharmacies so that a wider range of needs can be satisfied by these important local facilities.
- 3.100 As has been illustrated within the evidence report, the distribution of health care services in the Pembrokeshire – The Haven area strongly follows the settlement hierarchy in the Wales Spatial Plan. The Carmarthen and the Haven Towns Hubs serve as the area’s main public service providers. Despite its smaller size and population, the Fishguard Hub also plays a strong role in terms of the provision of health services, although it does suffer from a lack of choice of facilities and an absence of a hospital facility. In this regard, there is a broad complementarity in the health provision within the three hubs which provide the basis for the provision of important services to communities throughout the Spatial Plan Area. These hubs are further complemented by the (more limited) health role of the smaller settlements, to the extent that whilst the distribution of services does not adequately serve all parts of the Spatial Plan Area, it is reasonably good within much of this large rural area. In the future, it will be important to build upon and further enhance this current pattern and level of provision, particularly so that enhancements might be achieved in those areas of under-provision.

---

## Education

- 3.101 Within the Pembrokeshire – The Haven Spatial Plan Area there are 128 primary schools, 12 secondary schools and 2 special schools maintained by Pembrokeshire and Carmarthenshire County Councils. These provide education for more than 25,800 pupils.
- 3.102 All three spatial plan hubs provide a range of education facilities, with a reasonable distribution and choice of primary schools and a secondary school within each of the Primary Key Settlements and several of the Key Settlements. Although travel distances to schools are above the Welsh average, there is a clear complementarity between settlements and hubs. The travel distances are both a function of the rural character of the area and the large catchment of many schools. In general, the distribution of schools is good and tends to reflect the level of demand that exists amongst the population.
- 3.103 The complementarity that exists does not just relate to the role of the hubs and the main settlements but also to smaller settlements. This is important in providing for an appropriate level of education facilities throughout the Spatial Plan Area. In order to ensure that an adequate level of provision and complementarity can be retained in the future, issues of capacity within different schools and areas will need to be considered and addressed in a manner that ensures an the continued quality and availability of education services.
- 3.104 In terms of capacity, the Pembrokeshire Single Education Plan 2006-2008 highlights a capacity level in the primary sector of 6.6% in 2007, and predicts that this will rise to 15.4% in 2011 (707 places increasing to 1,642). Of this total, Haverfordwest has the greatest level of capacity (45% in 2007 but falling to 38% by 2011). Capacity in Milford Haven and Pembroke is forecast to increase by a similar proportion – from 12% to 15% of the County total. Capacity in Fishguard is forecast to increase by almost four times, from 42 to 116 places. The Single Education Plan 2006-2008 also highlights a capacity level in the secondary sector of 6.2% in 2007, and estimates this rising to 14.5% in 2011 (568 places increasing to 1,321). This capacity level is not divided by location.
- 3.105 Education provision in the Carmarthenshire part of the Spatial Plan Area is concentrated in the southern area – three of the four secondary schools are located in Carmarthen, Johnstown and Whitland. The level of capacity in these schools is much greater – a total of 843 places, compared to only 43 in the secondary school in Newcastle Emlyn.
- 3.106 This shows that there is a reasonable level of education provision and facilities within the Spatial Plan Area. In line with the distribution of population, these are particularly concentrated within the settlement hubs. The existing distribution of provision will provide a basis for future action which should seek to address imbalances in current and projected capacity and should encourage

---

a further improvement in the availability of high quality education provision for all within the Spatial Plan Area.

3.107 The settlements of Carmarthen and Haverfordwest also have a Higher Education and Further Education facility respectively within their boundaries. Trinity College in Carmarthen now has university status, a role which provides the basis for improved links with the Central Wales Spatial Plan Area (Lampeter and Aberystwyth), the Swansea Bay Spatial Plan Area (Swansea) and the South East Wales Spatial Plan Area (Cardiff, UWIC, Pontypridd and Newport). The presence of these facilities serves to increase the complementarity between the two settlements and underlines their role as the key settlements within the Spatial Plan Area. These facilities form an important element of social infrastructure which provides the opportunity for people to increase their skills and knowledge base. A successful educational institution can also encourage the retention of young people from the local area as well as attracting people from outside the Spatial Plan Area to study and/or work in the area. As such, they have the potential to contribute towards the strength of the economy within the area – a role that should be firmly supported.

3.108 Whilst the range of education facilities in the Spatial Plan Area does represent a strength, employment opportunities can be limited in many rural localities, and young people, particularly higher achievers, often associate career opportunities with towns and cities, resulting in a rural-to-urban brain-drain and an ageing rural population (NIESR, 2008). In order to minimise the rate at which this occurs, there is a need for the rural economy to offer not only the right employment opportunities, but to also convince young people that rural communities offer the potential for progression. As such, there is a requirement for rural policy to identify the needs of young people who want to develop careers in areas that have the potential for growth in rural communities. As part of this, consideration should be given to the potential for improvements in collaboration between schools and colleges and employment sectors in helping to enhance the skills base in a manner that reflects the requirements of the local economy. There is considerable opportunity for education and employment sectors to integrate with one another, for example in respect of research and development within the energy sector, the development of the skills base within the tourism and hospitality sectors and through an general increase in business operation skills such as management, promotion and marketing, finance and human resource management. The encouragement of these activities and actions will be important in stimulating better links between education establishments and different sectors of the economy and, by enhancing the local economy and workforce, helping to address the problems associated with the loss of young people from the Spatial Plan Area.

### **Conclusion**

3.109 In providing public and emergency services, there is a particular need to balance the need to serve the local population against the importance of

---

ensuring that services are (and can remain) viable and sustainable. Self-containment is not considered to be achievable at every settlement level in respect of these services – neither in terms of potential nor actual self-containment (i.e. taking account of patient and parental choices). The focus should therefore be to ensure the best quality distribution and range of provision.

3.110 The implication of this is that complementarity will be rooted in the dominant role of the hubs and the Primary Key and Key Settlements as the main locations for such services. This pattern of provision already exists and should be sustained in the future in order that the needs of the local population in respect of these important services might be satisfied.

3.111 Despite the important roles that the hubs play in the provision of health, education and emergency services, there is an ongoing need to further expand and strengthen the networks to ensure that those in more sparsely populated locations are able to access basic social infrastructure without difficulty. The continued development of the Co-Responder programme, together with improvements in GP and dental facilities will be important, as will a review of school provision and capacity to ensure that any changes in provision do not result in a deterioration in the quality or the availability of services. Although it will be important to seek to enhance the level of provision within rural parts of the Spatial Plan Area as appropriate, the reality is that some local centres and villages will not host any public service infrastructure. In this context, it will be important to ensure that strong, interconnected transport networks are identified as key element of the delivery structure so that emergency service response times can be reduced and both clinical and educational peripherality can be reduced through the continued improvement of accessibility for all members of the population to basic public services.

## **Transportation**

3.112 The achievement of complementary links between settlements in the Spatial Plan Area will necessitate the movement of people and will therefore depend upon the availability of good quality transport connections. The evidence report considers a range of issues relating to the transportation issues that link the various complementarity themes together and identifies proposed enhancement schemes and the ways in which transport services and infrastructure might strengthen or undermine complementarity.

3.113 The diagram below demonstrates how the long term strategy for the South West Wales region (including Pembrokeshire - The Haven) will be delivered in accordance with the South West Regional Transport Plan. The 'strategic corridors' are the same as the 'economic corridors' identified in the Pembrokeshire JUDP. Strategic routes to the east extend through to Carmarthen and connect with the A48 and M4 beyond. Whilst the ferry ports of Pembroke Dock and Fishguard are identified as providing essential links with Ireland, the supporting rail and road network is considered intrinsic to the