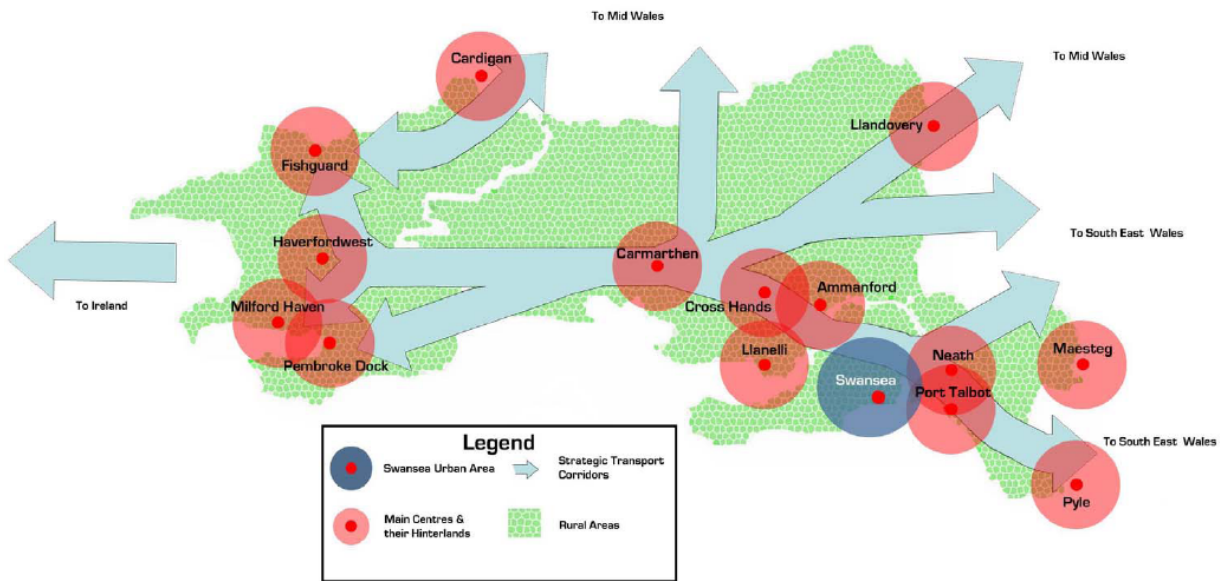


success of these ports in order to maximise their economic and employment potential.



Source: Provisional Regional Transport Plan for South West Wales (2008), pp 35

Fig 5 Regional Transport Plan vision for transport network

3.114

This existing network provides the basis upon which future improvements will be achieved. Ensuring good quality access in terms of journey times, the quality of routes and the frequency and quality of public transport services is central to the development and maintenance of complementary relationships within the Spatial Plan Area and to the achievement of the vision for the area. In summary, the analysis has demonstrated that:

- a By virtue of its geographical location and role as a transport hub, Haverfordwest is the best linked to other centres by road and public transport;
- b The accessibility of the other Haven Towns by road is broadly similar although by public transport, Pembroke Dock enjoys better accessibility than Milford Haven;
- c The location of Carmarthen to the east of the Spatial Plan Area, some distance from the Haven Towns Hub means that travel times from the town to other parts of the Spatial Plan Area are greater;
- d Fishguard is the least accessible of the hubs with greater journey times by road and public transport to the other hub settlements and fewer public transport services; and,

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- e Accessibility to and from the non-hub settlements varies considerably across the Spatial Plan Area, depending upon its location, relationship to the nearest hub settlements and the availability of existing road and rail infrastructure.

3.115

The vision for complementarity is built upon the aspiration for settlements to fulfil their full potential and for services and facilities to be provided within those key centres that are best able to achieve a critical mass to create a high level of attractiveness and attraction to investors. These are to be complemented by smaller, local centres which are to offer a more limited range of functions and facilities in order to support the main locations. The implication of this is a need to ensure that good levels of accessibility can be provided and sustained. Whilst this will be a function of geography, it will also depend upon the availability of infrastructure and services, as well as the ability to overcome the following existing barriers:

- a The structure and location of the road and public transport network which has a bearing upon travel distances and journey times between different settlements within the Spatial Plan Area.
- b The frequency and quality of some public transport services which impacts upon the level of patronage and extent to which it is capable of helping to encourage more sustainable forms of movement and increase complementarity between different settlements in the Spatial Plan Area.
- c The pressure that presently exists upon key sections of the transport network and the implications of the resultant congestion upon the long term attractiveness of different centres and the achievement of complementarity between centres in the Spatial Plan Area. This is recognised to be an issue both within settlements and on some of the main connecting routes.
- d The potential impact of the Cleddau toll bridge upon shaping travel patterns and levels of activity on either side of the Milford Haven Waterway. Whilst it provides a valuable link and avoids a lengthy journey around the waterway, it is perceived to represent a psychological barrier for some and hence as a possible barrier to complementarity.
- e Connectivity to the heavy industrial plants at Milford Haven and Pembroke Dock is recognised as being poor and as constituting a barrier to the long term enhancement of these areas as a key centre of the local economy.
- f Difficulties that have been identified for movement by a number of specific groups represent an important basis by which the equality of transportation provision in the Spatial Plan Area might have been undermined. A failure to address this barrier would be contrary to the ambitions of the Wales Spatial Plan vision which seeks to improve access to services for all sectors of the community.

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- 3.116 Addressing these challenges is vital to the delivery of the level of complementarity that is sought within the Spatial Plan Area. However, in responding, it is important to recognise that the physical character of the area does impact upon the potential for a very high level of connections between all areas.
- 3.117 The range of actions and measures that has been identified by the Regional Transport Plan and these would be important in helping to address and overcome the existing barriers to complementarity. Recognising that the future for complementarity will be dominated by the role of the largest settlements, it will be particularly important to ensure that these locations are the most accessible. However, good connections should also be promoted throughout the Spatial Plan Area so that all members of every community are able to take advantage of the enhanced complementarity by accessing a full range of services and facilities quickly and effectively.
- 3.118 As an associated matter, the enhancement of virtual communications will also be an important mechanism by which complementarity might be enhanced. It will support the economy and the provision of services and facilities throughout the Spatial Plan Area and will also be important in helping to reduce issues of peripherality which presently constitute a barrier to the ability of many local communities to access services that are available.

### **Complementarity between sectors**

- 3.119 The purpose of this chapter has been to highlight the way in which different functions and services are to be provided in a more complementary manner within the Spatial Plan Area in the future. This is important in highlighting the role of the different settlements which is considered in detail in the next chapter. However, in summary, this chapter has shown the particularly important role of the main Primary Key Settlements (Carmarthen, Haverfordwest, Pembroke Dock and Milford Haven) in the provision of employment, retail, leisure and public service facilities. This role reflects the population and housing distribution within the Spatial Plan Area. It is thereby the most appropriate in relating the supply of services to demand and concentrating activity into those locations that are best able to achieve an adequate level of critical mass to sustain services, not only for the benefit of those living within the hubs but also for the population of the Spatial Plan Area as a whole.
- 3.120 Whilst the main Primary Key Settlements serve a central role in the establishment of complementary relationships, this chapter has also highlighted the importance of smaller centres in helping to enhance the local service provision and thereby in complementing the offer of the larger settlements.
- 3.121 In considering complementarity within the Spatial Plan Area, the focus should not just be upon the relationship between settlements but also on the

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relationship between sectors. This is important given that the multiple roles that are performed by a number of centres necessitates a need to ensure that the different functions can be undertaken in a mutually beneficial manner and without resulting in conflict between their operation.

### **The cornerstones of complementarity**

- 3.122 The starting point in this regard, must be a need for complementarity between the environmental character and quality of the area and the pressure for development. One of the primary characteristics of the Spatial Plan Area relates to the quality of the natural environment and this is important in attracting visitors, in-migrants and investors. As the area continues to develop, it will be important to ensure that this characteristic is retained. The need for complementarity between the protection of the environment and the delivery of growth in key sectors throughout the Spatial Plan Area must be at the forefront of the decision-making and policy processes.
- 3.123 As considered elsewhere in this report, complementarity is fundamentally about sustainability. The achievement of complementarity will facilitate a movement towards a more sustainable and environmentally acceptable future which takes account of the natural capacity for growth and the importance of achieving a low carbon economy. Complementarity seeks to achieve a balanced distribution and provision of services. It recognises that not everything can be provided everywhere and that self-containment is neither viable nor sustainable on every settlement level as this would result in an over-capacity in respect of services and an unsustainable level of development and activity. Even within this context of focusing activity into the most appropriate locations, it will be important to test potential development sites and ensure that they are capable of accommodating the growth required to achieve complementarity in a manner that does not have any adverse impacts upon the environment.
- 3.124 To this end, it is important to achieve a balance between development, protection and the provision of adequate links between facilities and services so that complementarity might be able to satisfy the four elements of sustainability.
- 3.125 Complementarity between settlements is all about serving the needs of the local communities. As such, an understanding of the need for complementarity between the role of settlements as population and housing locations and as centres for other services and facilities must represent another cornerstone of the policy process. Adopting this approach will mean that functions are provided in locations where they best match demand, recognising the different needs of the different members of the community and the particular implications of the seasonal increase in local population that is caused by the locally important tourism industry – both in terms of the additional pressure for services and the potential conflict that might arise between the need to serve the local population and visitors. A failure to achieve complementarity between population and other elements will result in an increased requirement for

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unsustainable vehicle trips, an inability for individual settlements to fulfil their potential and a failure for settlements to contribute towards the vision for the area as a network of strong communities underpinned by a robust, sustainable and diverse economy.

3.126

Recognising that not all functions and services can be delivered within every individual settlement means that people will have to travel to work or to access public services or leisure or retail facilities. As a result of this, the final cornerstone of the policy process must be complementarity between the location and users and services and the availability of adequate infrastructure to connect them. The evidence report has highlighted the extent to which very large numbers of car and public transport trips are made every day by people travelling to work, to go shopping, to access leisure or public service facilities, and by tourists. These patterns of movement will continue, even though the delivery of the strategy set out within this report will provide a basis by which the local provision of facilities might be increased in certain areas. It is therefore essential to seek to maximise accessibility within the Spatial Plan Area for all members of the community (including those that do not have access to a car), albeit recognising the delivery challenges that exist in any large rural area such as this particularly in relation to the provision of public transport services. Achieving complementarity in this regard can be achieved by ensuring key access barriers are removed where possible. Linking back to the environmental considerations, transportation and development solutions should be carbon tested to ensure that their environmental implications are appropriate and that they do contribute towards the sustainability objectives of the Welsh Assembly Government.

### **Fitting the sectors together**

3.127

As has been shown, there is a particular importance for the role of settlements as service centres to be complementary with their role as population centres. In addition, there is also a need for complementarity between the location of services and the availability of key infrastructure. In many respects, all of the sectors are related to one another and should therefore be complementary to one another. To this end, particular regard should be given to:

- a Complementarity between the employment sector (which focuses upon B Class sectors) and retail, leisure, tourism and public services, all of which employ large numbers of people and make an important contribution to the local economy.
- b The potential risks to complementarity between the employment, leisure and tourism sectors as the larger scale port and energy functions might detract from the attractiveness of a particular area as a visitor destination. The concentration of the energy functions in to a relatively small area at Milford Haven and Pembroke Dock is important in overcoming this potential issue, whilst also delivering economies of scale and scope within the sector.

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- c Complementarity between leisure and retail functions as people might engage in linked trips and increasingly view shopping as a leisure activity. The inclusion of a multiplex cinema and a number of bars and restaurants within the St Catherine's Walk development in Carmarthen is important in highlighting the integration between these activities.
  - d Complementarity between tourism, leisure and retail as holidaymakers will visit shops whilst within the area and may also engage in leisure activities that are primarily oriented towards the local population. In this regard, the promotion of retail and leisure functions can be important in supporting tourism, particularly within the main hubs which do not perform a particularly strong tourism role at present.

3.128

The strategy contained within this chapter and the rest of the report provides a basis by which complementarity can be achieved between these roles and functions. As such, in addition to supporting the role of and relationship between settlements, it also helps to ensure that connections can be provided between the provision of broad sector areas, thereby helping to enhance the sustainability and quality of provision and to achieve the vision for the area as a network of strong communities supported by a robust sustainable diverse high value-added economy.

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4.0

## The Future Role of the Main Settlements

4.1

The previous chapters have identified the vision for complementarity within the Spatial Plan Area and have explained the way in which employment, retail, leisure, tourism and public services would be delivered in a more complementary manner in the future. The delivery of this vision would have direct implications upon each of the settlements within the Spatial Plan Area and the way in which they relate to one another. This chapter draws our preceding analysis together by highlighting the anticipated key role of the main settlements and the ways in which they are expected to relate to one another. Details of the anticipated future roles of the main centres are set out in a series of tables in the executive summary and are summarised in graphical form in this chapter. An understanding of the specific ways in which these roles and relationships might be promoted is set out in more detail in Chapter 5.

### Key roles – key issues

4.2

The evidence report and the preceding chapters of this report have shown that a reasonable level of complementarity exists within the Spatial Plan Area and as such, in many respects the future of the area will not represent a radical departure from the current situation.

4.3

In reflection of the settlement hierarchy provided within the Wales Spatial Plan and the Local Development Plans of Carmarthenshire County Council, Pembrokeshire County Council and the Pembrokeshire Coast National Park Authority, the focus will be upon Carmarthen and Haverfordwest as the largest towns within the Spatial Plan Area which serve as regional and sub-regional centres (respectively). However, there is a clear need to maintain, enhance, identify and promote strong complementary links with the other Haven Towns which all perform key roles within the Spatial Plan Area and with other smaller centres which are also important in further enhancing the overall strength of the area and in serving local communities and visitors.

### Carmarthen and Haverfordwest

4.4

Although they are located some distance from one another and within different hubs, their position as the two largest employment and retail centres and as the only County towns within the Spatial Plan Area mean that the roles of Carmarthen and Haverfordwest will overlap in a complementary manner with their key future roles identified as follows.

- a Carmarthen is the largest population centre within the Spatial Plan Area and Haverfordwest is forecast to grow to a similar population level as Milford Haven (as the second largest centre). Their status as the key population (and hence housing) locations within the Spatial Plan Area will further emphasise their role as the most significant settlements within the area in respect of the provision of jobs and services. As such, it will be important in

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increasing the complementary relationship between the two towns at the top of the settlement hierarchy for the Spatial Plan Area.

- b As the two County towns, Carmarthen and Haverfordwest will remain predominantly public sector at their hearts, both providing public administration through the County Councils as well as health and education and emergency services. Opportunities may arise in the future to increase the already expansive public sector representation within the centres through an increased role of the Welsh Assembly Government or Central Government activities. Whilst this would provide additional jobs and would bring a number of benefits to the area, some caution on becoming too reliant on the public sector should be taken as it would result in an overly restricted economic base – an existing problem that the Wales Spatial Plan seeks to resolve. The continued development and growth of the public sector will be important and will help to further increase complementarity between these two key centres but should therefore be promoted in conjunction with other economic activities.
- c Both towns are also considered to be key locations for the business activity sector. Whilst not as prolific as the public sector, this sector has two key components – business services and research and development. Given the geographical location of the two towns and the level of competition that exists from larger centres to the east, their role in respect of the business service sectors is likely to remain limited to the local area. However, it is recognised that an increased level of business activity within the Spatial Plan Area will help to improve its developing commercial economy and will increase the business profile of the area. In addition, there would appear to be further opportunity for the development of research and development / high technology sectors within the Carmarthen and Haverfordwest, drawing upon Carmarthen's strategic location and role as a Knowledge Economy Centre and Haverfordwest's proximity to the new Technium at Pembroke Dock and the on-going R&D activities that are associated with the energy sector at Pembroke Dock and Milford Haven. The presence of higher and further education establishments and large hospitals in Carmarthen and Haverfordwest provides further opportunities upon which growth in the R&D sector might be based whilst, in the longer term, any growth in business activity could be coupled with expansion of the Withybush Airport. In view of the R&D potential that exists elsewhere in the Haven Towns Hub, the opportunity might exist for Haverfordwest to develop a stronger base in these value added sectors than might be achieved in Carmarthen.
- d Haverfordwest and Carmarthen also serve as the main retail centres within the Spatial Plan Area, attracting custom from a wide surrounding area. As such, they are both viewed as serving a complementary role although Carmarthen does have the edge over Haverfordwest as the key retail centre for the Spatial Plan Area in terms of its size, retailer representation and catchment area. In terms of future growth within the towns, Carmarthen has expansion plans which are currently being progressed and which will result



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in a substantial enhancement to its status as a retail centre. As such, it will be important to ensure that the existing complementary relationship between Haverfordwest and Carmarthen is not undermined. Despite its current strengths, this will necessitate improvements to Haverfordwest's retail offer and attractiveness as a destination so that, although it will remain a smaller centre in comparison to Carmarthen, it can continue to be complementary and might not be harmed by the increasing strength of the larger town. Enhancements to Haverfordwest town centre would not only enable it to better serve the needs of the local population but would also be important in linking into its enhanced role as a visitor destination. Although the town centre is constrained, consideration should nevertheless be given to the identification of land (either new sites or through the redevelopment of existing buildings) upon which slightly larger units might be delivered. In the short term, environmental improvements within the town centre will represent a key basis by which its attractiveness might be increased whilst an improved retail platform at Withybush Retail Park might help to strengthen the overall perception of Haverfordwest's role as a retail centre. In addition, improved linkages between the town centre and Withybush Retail Park in order to encourage joint trips. Such linkages might include regular bus services, the provision of a park and ride facility and enhanced physical connections (making for easier and more pleasant connections).

- e Due to their status as County towns, both Carmarthen and Haverfordwest have a certain responsibility to meet the leisure needs of the local population. Haverfordwest's provision is considered to be good and is well supported by the other Haven Towns such as Milford Haven and Pembroke Dock. Carmarthen, on the other hand, is less well provided for in terms of its range of leisure facilities although this is set to improve to some extent with the proposed opening of a multi-screen cinema within the St Catherine's Walk development. Nevertheless, there is scope to improve the leisure role of both centres – particularly Carmarthen – and a further assessment of the leisure needs and capacity for additional facilities within the Spatial Plan Area should be undertaken in order to inform this process.
- f In terms of tourism, both centres presently serve a much more limited role in comparison to the smaller centres within the Coastal Corridor and the main tourism hub. However, whilst neither town will act as the primary draw for tourists into the area, it is considered that there is potential to develop the range and level of facilities within each settlement. Whilst Haverfordwest is not a key tourism destination, its central position within Pembrokeshire means that it does have significant potential as a visitor destination – an opportunity that should be exploited. In both towns, the provision of enhanced accommodation, food and drink establishments and other facilities such as visitor attractions, museums and outdoor activities, together with the promotion of their retail and leisure offer and the enhancement of their sense of place (drawing upon the existing and enhanced quality of the towns) and interest would be important in attracting visitors. This increased role would help the towns to complement the more

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dominant tourist centres by broadening the overall range of opportunities that are available – particularly when the weather is bad or within the shoulder or off-peak periods. Ongoing regeneration and rejuvenation schemes will help to improve the quality of the urban realm by contributing to the conservation of existing strengths and facilitating necessary physical and functional improvements. This will be important in improving the appeal of the town to tourists and local people alike.

g Both Carmarthen and Haverfordwest act as the main centres for public services within the Spatial Plan Area. Given their status as the largest settlements and County Towns, this role is appropriate and is expected to continue in the future, with on-going enhancements to the level of facilities and the quality of the service provision helping to ensure that the needs of those living in the Spatial Plan Area might be further enhanced.

4.5 More than any of the other centres within the Spatial Plan Area, due to their status, strength and central locations, the County towns provide the greatest opportunities for sustainable long term growth. The image of the towns is therefore considered paramount to this and will be a key benefit when drawing trade and attracting people and activity from the wider area. Careful consideration should be given to the ways in which this image might be promoted and further enhanced in the future through regeneration activity, new development, the facilitation of increased services and facilities and additional marketing of the towns as the primary settlements within the Spatial Plan Area.

#### **Milford Haven and Pembroke Dock**

4.6 Located within the Haven Towns Hub, and both of a similar size, the roles of Milford Haven and Pembroke Dock would also be expected to overlap to a certain extent.

a The towns of Milford Haven and Pembroke Dock, located either side of the Milford Haven Waterway, both have a focus on heavier sectors with a heavy reliance on the energy sector and the ports. The location of these sectors in these relatively confined areas is seen as a real opportunity for future development to the benefit of the Spatial Plan Area as a whole and provide a strong platform for future growth in this industry. The key aim is that the role of these two centres remain complementary rather than internally competitive (which would serve to undermine the strength of their combined offer). However, given their status as an ‘energy hub’ within a strategic hub, their roles are already clearly defined and it is anticipated that they will continue to develop in a complementary and mutually supportive manner. This is something which should be monitored over time. By their very nature, the heavy industries which have grown so successfully within Milford Haven and Pembroke Dock, are to a certain extent conflicting to the high quality natural environment for which this area of Wales is renowned as well as the tourism industry upon which it thrives. However, focusing these sectors into two key centres is in actual fact considered to be complementary with the rest of the Haven Towns Hub and the Spatial Plan Area as a whole as:

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- i The sectors are broadening the economy and raising the profile of the Spatial Plan Area as an important economy sector;
  - ii The sectors provide a basis for all sorts of spin-off activity including research and development and more recently filming for both TV and Film within the redundant boat hangar's in Milford Haven Port (an element of the creative industries sector); and,
  - iii Concentrating the sectors limits potentially environmentally damaging activities to a small area which limits its impact on the quality of life for local people and the tourism industry within the Spatial Plan Area.
- b Linked to the current role of Milford Haven and Pembroke Dock as major energy and port centres is their potential for the on-going development of associated and added value sectors such as research and development, high technology and environmental sector activities. The recent development of the Technium and high tech business park at Pembroke Dock will, together with on-going works within the existing (and additional future) energy sector installations, provide an important platform for the delivery of growth in these associated, value added sectors. In the longer term, there might be the potential to deliver a complementary science park at Milford Haven to increase capacity in this key new sector. Given the importance of the energy sector in these two centres, it is anticipated that they will be the initial focus for this form of economic diversification but that this role would be complemented by similar development (albeit not necessarily related to the energy sectors) in Haverfordwest and Carmarthen.
- c Both settlements have working ports which also have strong links to the energy sector. Pembroke Dock also has the benefit of a ferry terminal with a regular service to Rosslare in the Republic of Ireland. However, whilst both port areas are busy it is considered that more could be done to maximise their economic potential and provide spin-off benefits to the rest of the Spatial Plan Area. This might include increasing capacity for passengers or freight and the potential development of facilities to accommodate new forms of activity such as an increased level of cruise liner traffic – something that would be very important in helping to enhance the role of both settlements as tourism centres.
- d Both settlements have a reasonable range of leisure activities and the proposed Martello Quays scheme at Pembroke Dock would be important in substantially increasing its offer in this respect. In seeking to develop the range and level of leisure facilities in both areas, it is apparent that there is potential to develop commercial leisure opportunities stemming from the existing marina at Milford Haven and the proposed marina development at Pembroke Dock. Such facilities would not be purely oriented towards serving the needs of local residents and those living in surrounding areas but would also serve the needs of visitors to the area. As such, the promotion of marina developments would help to increase the profile of Milford Haven and Pembroke Dock as visitor destinations which are complementary to the role of the major tourist hub areas.

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4.7 Pembroke Dock also serves an important retail role for the south of Pembrokeshire. Although remaining secondary to Haverfordwest, Pembroke Dock has a good range of both convenience and comparison retailers. In the future, it is likely that it will increase in its attractiveness as a centre with the development of Martello Quays and as such should remain strong as both a retail and leisure destination which is able to support and complement Haverfordwest. By contrast, it is anticipated that Milford Haven's future retail role will continue to be more limited to that of a small scale local centre, serving the convenience retail needs of the local population but not attracting a substantial level of trade from surrounding areas and experiencing a considerable leakage of expenditure to Haverfordwest and Pembroke Dock.

4.8 Given the strength of these two other centres (Haverfordwest and Pembroke Dock), this role is considered to be acceptable and will facilitate complementarity within the Haven Towns Hub – there is a concern that a policy that sought to promote three major retail centres within a relatively small area might result in unacceptable levels of competition, to the detriment of the strength of each centre and of the hub overall. Within this context of the role of Milford Haven, more development can and should be encouraged, commensurate with its anticipated scale. This would include better quality convenience retail provision and a wider choice of local and low order facilities. Such an approach does not represent an abandonment of the town but rather a reconfiguration on the basis of the reality of what it can achieve and how it can do this.

### **Pembroke and Neyland**

4.9 Pembroke and Neyland both act as 'linked settlements' to their larger neighbours of Pembroke Dock and Milford Haven respectively. However, they both perform different roles and functions. Pembroke is a larger centre which has an important tourism and (associated) retail function as well as an important albeit limited representation in a wide range of employment sectors such as banking, legal services and property. This is important in enabling it to support the future role of Pembroke Dock and that of the Haven Towns hub more generally and might provide a basis for the further development of its economic base in the future.

4.10 Neyland has a much more limited role in retail and employment terms and its tourism and leisure function is similarly more limited to the presence of a marina and yacht club.

4.11 In terms of their future, a small development at South Quay in Pembroke might come forward. Although details of this development are currently unknown it is believed that its main aim will be to add to the town's leisure and tourism offer. In addition, the opportunity also exists for Pembroke to act as a key centre within a slightly enlarged Coastal Corridor. In the case of Neyland it is considered that there is potential to maximise its links to the marina and increase its attraction as an area for water based leisure activity

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- 4.12 It is considered that if the expansion of Neyland as a water-based leisure destination can be developed and the scheme at South Quay in Pembroke (and the larger Martello Quays development in Pembroke Dock) does come forward, there is potential for this part of the Spatial Plan Area to become even more of a tourism and leisure hub. This would complement Haverfordwest and Milford Haven as the existing key leisure centres within the Haven Towns and would also enhance and complement the Coastal Corridor in respect of providing an additional strength to the tourism offer within the Spatial Plan Area.

### **Fishguard and Goodwick**

- 4.13 Fishguard and Goodwick represent very small scale centres with a limited economy and a local focus. Nonetheless, the centres benefit from the critically important port function which has helped to enhance the profile of this area and promote it as a 'gateway hub'. The port creates numerous economic opportunities which are complementary to some of those in Pembroke Dock and Milford Haven and help to further increase connectivity of the Spatial Plan Area with the Republic of Ireland. The opportunity should be taken to build upon these opportunities through the promotion of appropriate port related development and other employment facilities. However, in other respects complementarity is limited and there is a substantial need to improve it but within the context of what can reasonably be achieved and the reality that these settlements will remain less significant than the Haven Towns, Carmarthen and a number of other settlements as population, employment, retail, leisure and public service centres.
- 4.14 The evidence report has shown a need for a large foodstore within northern Pembrokeshire which is able to compete with the large food retailers currently within Haverfordwest. Planning permission has been granted for a foodstore which will improve sustainability in this part of the Spatial Plan Area and will complement the retail roles of the nearby centres, potentially bringing spin-off benefits by attracting other retailers into the area. However, although it is considered that there is clear scope for Fishguard to improve its comparison retail offer it is recognised that Haverfordwest will remain the key destination for this type of shopping. There is a similar position with the leisure offer to the north of Pembrokeshire. Leisure is relatively limited within this area and has a local focus by offering facilities such as a leisure centre, swimming pool etc. Other facilities which demand a relatively large catchment area such as a multi-screen cinema and ten-pin bowling are located elsewhere in the Spatial Plan Area. Although ideally these facilities would be located within closer proximity to the hub it is considered unlikely that they would be financially viable or deliverable. As such, a balance needs to be struck through which local needs are met whilst recognising the limited function of this area. The long term aspiration should be to develop the role of the Fishguard hub as a centre for local activity but within an appreciation of the realism of this in terms of the market interest and viability of delivering the necessary level of growth that would sustain a greater level of self-containment in this northern part of the

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County. A balance should thereby be struck between aspiration and realism as well as between sustainability and viability of provision.

- 4.15 As has been detailed, a feasibility study has been undertaken to appraise the potential to redevelop the port and to deliver a new marina facility alongside. This would be important in raising the leisure and tourism profile of the hub and might also help to accommodate cruise liners into the area, a potential growth area for the Spatial Plan Area.
- 4.16 There would appear opportunity to develop the tourism role of Fishguard and Goodwick in order to maximise the gateway opportunity which exists. Specifically, more could be done to market the area as a place to stay and visit and as a service centre for those visiting northern Pembrokeshire, rather than as somewhere to pass through on the way to the port. In addition, the provision of high quality accommodation and bar and restaurant facilities would also help to fulfil this objective, thereby enhancing the profile of Fishguard and Goodwick as a tourist centre and unlocking the potential of north Pembrokeshire.
- 4.17 Overall, the key future role of this Hub is to recognise that the settlements of Fishguard and Goodwick (with the exception of the port) have, and will continue to have, a limited function. Whilst this might appear to conflict with its status as a Spatial Plan Hub, the reality is that all three hubs serve different functions and that the primary role of the Fishguard Hub is that of a gateway between Wales and the Republic of Ireland. This is a role that it serves well and measures should be taken to ensure that it can continue to do so in the future. In addition, however, it is necessary to ensure that the hub can meet the day-to-day needs of the local population and serve its role in a way that is beneficial to north Pembrokeshire and the Spatial Plan Area.

#### **Tenby and Saundersfoot**

- 4.18 Tenby and Saundersfoot are geared towards the tourism industry. They essentially act as a 'tourism hub' and are largely at the heart of Pembrokeshire's tourism industry. This tourism role is important to the Spatial Plan Area as the resorts attract thousands of visitors each year, creating spin-off benefits for the surrounding centres and facilities. Beyond its tourism role, Tenby is an important centre whereas the role of Saundersfoot is much more limited to that of a local centre serving the needs of the immediate catchment. Tenby is an important centre for South East Pembrokeshire. In addition to its tourism and hospitality role, it also offers a broad retail offer, leisure facilities (including a leisure centre and cinema), a secondary school and a cottage hospital. This highlights its significant role as a population as service centre as well as a tourism settlement.
- 4.19 In terms of the future roles of these centres, it is considered that they will continue to develop as the dominant tourist destinations within the Spatial Plan Area and policy should seek to maintain and enhance this role which could include developing a niche tourism opportunity or organising events/festivals

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which would help to extend the tourist season. In the future, it is anticipated that the tourism role of these centres will be complemented by the continued development of other centres throughout the Spatial Plan Area. However, it is anticipated that they will continue to act as the main focus for tourism activities. In addition, Tenby will continue to serve an important local role as a retail, leisure and service centre. This should be promoted as being important in serving the needs of those living in South East Pembrokeshire as well as in complementing its wider tourism role.

### **Narberth and St Davids**

4.20 Narberth and St Davids are also small centres which are largely attractive to visitors to the Spatial Plan Area. Both centres have developed niche retailing opportunities which, together with St Davids' role as the smallest city in the UK and a major heritage centre, has brought them success as tourist destinations. As such, the centres are complementary to the larger nearby centres whilst performing their own important function within the Spatial Plan Area. Narberth, whose niche retailing role is more established than that of St Davids, has been able to further develop off the back of two major visitor attractions within Pembrokeshire, namely Bluestone and Oakwood Theme Park.

4.21 These unique centres are considered important in helping to increase the appeal of the Spatial Plan Area although their distinctiveness is recognised and it is appreciated that not everywhere can follow this model. However, they do represent how focus should be on the continued development of some very strong niche centres in order to boost the appeal of the Spatial Plan Area and beyond this it demonstrates the importance of local distinctiveness and the need to accept the local function of these smaller centres which cannot be forced through policy.

### **Other centres**

4.22 The other local centres within the Spatial Plan Area have no clearly defined function but nevertheless play an important role in meeting the day to day needs of the local population in retail and housing and to an extent, employment and leisure. They also serve the population living within their wider hinterland and to this end, they serve an important function in complementing the larger centres and in helping to sustain the strength of local communities across the Spatial Plan Area.

4.23 Many of the centres also have a small scale tourism function which will complement and enhance the overall offer throughout the Spatial Plan Area.

4.24 The aim for these local centres must be to do what they currently do, well. As stated above, local distinctiveness is important and centres must be robust, strong and attractive enough to retain people and make them attractive places to live. It is therefore considered that individual village studies may be required to better understand how the local centres are meeting local needs. The opportunity exists for small, rural settlements within the Spatial Plan Area to

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work together as settlement hubs – defined as groups of settlements that share services and functions in order to ensure provision and reduce the need for a duplication which would be both unsustainable and subject to potential delivery challenges.

### **Complementarity and the Future Role**

- 4.25 There is clear complementarity between the Carmarthen and Haven Towns Hubs and particularly between the towns of Carmarthen and Haverfordwest in population, employment, retail, leisure and public service terms. However, there is concern regarding the future of Haverfordwest as it is likely to become under increasing pressure from the new development in Carmarthen which will significantly strengthen its retail offer and could increase trade drawn from the west of the Spatial Plan Area which would otherwise have gone to Haverfordwest. Improvements should be encouraged in Haverfordwest in order to ensure that it might maintain its complementary roles and beneficial relationships with other settlements, particularly Carmarthen.
- 4.26 The Fishguard Hub plays a far less complementary role within the Spatial Plan Area but equally it is not competitive. However, its role as a gateway hub does complement the Haven Towns Hub. There is much scope to improve the role of the Fishguard Hub through the enhanced local provision of employment, retail and leisure opportunities which will make it both more complementary and more sustainable. However, the reality is that it will never serve as dominant a role as some of the larger towns within the Spatial Plan Area.
- 4.27 As the largest hub, it is evident that there is a large degree of complementarity between the different Haven towns in respect of employment, retail and leisure functions. Indeed, the centres work so well together the Hub can be viewed as a single entity with good retail and leisure facilities, a strong and increasingly diverse economy and, as identified opportunities are exploited in the future, an increased range of opportunities to serve tourists. Viewing the Haven Towns Hub as a whole and not as five separate towns is important in ensuring that the considerable benefits that this area offers to itself, to surrounding communities, to the Spatial Plan Area and to Wales as a whole can be fully appreciated. The future policy response must be to accept that it is not appropriate for the centres within the hub to stand alone but rather to accept and prepare for interaction between the settlements so the local population and visitors are able to take advantage of the retail, employment, leisure and tourism offer available in each of the centres.
- 4.28 The Coastal Corridor is clearly the dominant tourism centre within the Spatial Plan Area and, although not defined as a hub by the Wales Spatial Plan, it has become apparent that Tenby and Saundersfoot have developed into an informal 'tourism hub'. Other smaller centres within the Coastal Corridor and other inland and coastal areas throughout the Spatial Plan Area also have an important tourism function which complements that of the main tourism hub. In



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the future, it is anticipated that further complementarity will be achieved in this regard through an increase in the tourism offer of the main settlements.

- 4.29 In addition to their tourism role, the settlements within the Coastal Corridor also act as local population and service centres and, in this regard, are clearly complementary to the defined hubs and other surrounding settlements. This pattern is seen throughout the Spatial Plan Area with a number of small centres serving an important role as tourist centres, retail locations (some of which serve a wider-ranging niche retail function), or centres for leisure or small-scale employment activity. Whilst the focus of such activity will generally be localised with the facilities serving the immediate area, it is important not to underestimate the contribution it can make to complementarity, as such locations support the more dominant function of the larger settlements.
- 4.30 In this regard, complementarity is clearly evident between the three settlement tiers defined by the Wales Spatial Plan. The Primary Key Settlements, which are considered to be the strong main town centres, are able to attract and support the necessary facilities to serve all the population. These are then further supported by the Key Settlements and Local Centres so that residents do not have to travel long distances to meet all their day to day needs with key services available within their immediate environs. However, this hierarchy of support is much weaker to the north of Pembrokeshire due to the present fragility of the Fishguard Hub. Efforts to improve Fishguard would therefore be important in addressing these existing difficulties.
- 4.31 The above conclusions show that strong links and connections and improved accessibility between the settlements and the hubs is crucial if high level complementarity is ever going to be achieved. Specifically, road capacities and public transport links need to be assessed and, as appropriate, enhanced. It is also noted that the impact of the Cleddau Toll Bridge should be assessed in order to ascertain whether the small toll charge is considered a barrier to complementarity by the local population.
- 4.32 Complementarity within the Spatial Plan Area will be achieved by all centres serving their full potential and making a positive contribution to the enhancement of the Spatial Plan Area and the delivery of the vision for the area that is set out in the Wales Spatial Plan. This would result in a more sustainable pattern and distribution of activity and the resultant need to travel to access services and facilities. As such, it would make an important contribution not only to the enhancement of viability and vitality of particular settlements and locations throughout the Spatial Plan Area but also in contributing towards the Welsh Assembly Government's low carbon agenda.
- 4.33 The understanding of the pattern of key roles that are performed by each of the settlements within the area and the delivery of services will be important in helping to achieve this aim. In order to deliver the change that is required, it will be necessary to identify the actions and changes that should be undertaken in

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the future by the Welsh Assembly Government, the local authorities and by other stakeholders and service providers.