Nathaniel Lichfield and Partners

Planning Design Economics

EVIDENCE REPORT

PEMBROKESHIRE – THE HAVEN SPATIAL PLAN AREA COMPLEMENTARITY STUDY

Welsh Assembly Government in association with Pembrokeshire County Council, Pembrokeshire Coastal National Park Authority and

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1.0 # Introduction

Scope of the Commission

1.1 Nathaniel Lichfield and Partners has been commissioned by the Welsh Assembly Government in conjunction with Carmarthenshire County Council, Pembrokeshire County Council and Pembrokeshire Coastal National Park Authority to prepare a complementarity study of the Pembrokeshire – The Haven Spatial Plan Area.

1.2 The purpose of the study is to consider the existing role and function of, and the relationship between, the hubs and settlements within the Spatial Plan Area and to advise on the ways in which these might be enhanced. In so doing, it will provide high level policy recommendations that will facilitate:

a Greater levels of sustainability;

b An improvement in the viability and economic wellbeing of the area;

c Better levels of service provision and delivery; and,

d The establishment of a greater quality of life for those that live and work in and those that visit the area.

1.3 It will also provide a firm policy basis for the delivery of the Wales Spatial Plan's vision and aspirations for the area and will form part of the evidence base for the emerging Local Development Plans for Carmarthenshire County Council, Pembrokeshire County Council and Pembrokeshire Coastal National Park Authority.

Evidence Report

1.4 An understanding of the existing context within the Pembrokeshire

1.5 The Haven Spatial Plan Area provides a key starting point for the assessment of the current levels of complementarity and the identification of opportunities for enhancements. As such, the purpose of this evidence report is to provide a detailed overview of the current situation within the Spatial Plan Area in respect of:

a Population and housing;

b Employment and the economy;

c Tourism;

d Leisure;

e Retail; and,

f Public Services.

1.6 This provides a basis for the separate Complementarity Study report which makes recommendations on the ways in which settlements might individually and collectively contribute towards the vision for the area that is contained within the Wales Spatial Plan.

1.7 Taking the key topic areas detailed above in turn, this evidence report:

a Considers the role and function of and relationship between settlements; and,

b Identifies the key strengths and weaknesses in these roles and the implications for achieving greater levels of complementarity and in helping to deliver the vision for the Spatial Plan area.

1.8 In considering the current context, we have sought to provide a clear basis by which policy decisions and choices might be made and existing levels of complementarity might be enhanced. In so doing, we have retained a clear focus upon the importance of complementarity in:

a Contributing towards a stronger and more diverse local economy;

b Helping to retain people within the area – for employment, retail and leisure purposes and for the consumption of public services;

c Enhancing the vitality and viability of individual settlements, hubs and the Spatial Plan Area; and,

d Contributing towards more sustainable travel patterns.

1.9 The key themes and issues highlighted in this evidence report are developed into action points for enhancement in the main Complementarity Study report.

Data Issues

1.10 The purpose of our analysis has been to identify the key strategic issues in the Spatial Plan Area in order to inform the policy making process at a National Assembly and local authority level. It has focused upon the key hubs, as defined by the Wales Spatial Plan and the settlements that are contained within each hub area and elsewhere in the Spatial Plan Area.

1.11 In preparing this evidence report, a wide range of data sources have been identified and analysed. The level and nature of the analysis that is contained for each sectoral topic is a function of the type, amount and quality of information that is available. In the light of this, it is important to recognise the limitations that are presented by the availability, reliability and applicability of data. Specific comments are set out in each chapter in respect of the data that has been used to inform our analysis, but the following points are made by way of general background in respect of the data that has informed this evidence report:

a In many cases, statistical data is only available on a County level and cannot be provided on a settlement basis. This means that it is not possible to undertake the same depth of analysis that could otherwise be provided at a larger spatial scale. However, as appropriate, the study team has undertaken an analysis on a ward, lower super output area or postcode sector basis. The data that has been obtained at this level has been built up to provide an indication of the current situation on a settlement and hub level. Whilst it is accepted that in some cases, such data may be more reliable at a larger scale, the purpose of this study is to consider the role of and relationship between settlements within the Spatial Plan Area. Even though it is subject to some unavoidable errors, this approach represents the most reliable and robust mechanism by which the current situation at the local (sub-county) level can be understood.

b In order to provide an understanding of the current circumstances within the Spatial Plan Area, we have sought to make use of the most up-to-date information. However, in some cases, the most recent information is provided by the 2001 Census. Although this remains the most up-to-date source of data relating to a wide range of matters and is considered still to provide an important indication of issues within the Spatial Plan Area, consideration should be given to the changes in situation that might have taken place since the survey work was undertaken. Where we have relied upon census information, we comment upon the extent to which changes over the past 8 years might have impacted upon its continued relevance.

c In a number of cases, our research has identified gaps in the availability of relevant data. We have sought to overcome any such gaps by applying alternative forms of analysis although, as appropriate, the main report identifies a number of additional research and information requirements that should be investigated in order to enhance the level of knowledge and understanding of the Spatial Plan Area. In some cases, this additional research will be particularly valuable in informing the implementation of the policy choices and actions that are recommended in the main report.

1.12 In spite of these general data issues and the specific issues that are detailed in each section of the report, it is considered that the data that has been used as part of our settlement analysis can be relied upon to provide a clear indication of the extent to which complementarity exists between the settlements and to inform recommendations on the ways in which it might be enhanced in the future.

2.0 Policy Context

2.1 This chapter provides an overview of the adopted planning policy context for Pembrokeshire – The Haven Spatial Plan Area. The Wales Spatial Plan is the strategic vision which will inform emerging Local Development Plans for Carmarthenshire, Pembrokeshire and Pembrokeshire Coastal National Park. The current Local Authority planning framework consists of the Carmarthenshire Unitary Development (CUDP) and the Joint Unitary Development Plan for Pembrokeshire (PJUDP) which covers both Pembrokeshire County Council and the Pembroke Coast National Park Authority; both these plans were adopted in 2006. The objectives of strategic planning policy are discussed and the extent to which the current policies help to achieve a greater level of complementarity is also considered.

2.2 Work is being undertaken on the preparation of the Local Development Plans for each of the three authorities within the Spatial Plan Area. Pembrokeshire Coastal National Park Authority has undertaken the most progress on its LDP, having now completed the public consultation on its deposit draft LDP. Pembrokeshire County Council has recently undertaken public consultation on its pre-deposit preferred strategy document, whilst Carmarthenshire County Council has completed its LDP delivery agreement but is experiencing some delays in the preparation of its LDP.

The Vision for Key Settlements

2.3 The PJUDP sets out a series of aspirations and priorities for different settlements in order to guide the location of future development. By contrast, the CUDP contains a 'Sustainable Strategic Settlements Framework' which states that the scale of future growth in each settlement will relate to its position in the hierarchy.

2.4 The development strategy of the PJUDP identifies Haverfordwest as a sub-regional centre and the primary focus for future employment development. It seeks to concentrate future development predominantly in Pembrokeshire's tier 1 and tier 2 settlements which are located along the 'economic corridor' – the A40/A477 road and rail networks to the ports of the Haven Waterway. Milford Haven, Neyland and Pembroke Dock are to be the focus for regeneration activity and strategic sites are to be identified for employment and business development.

2.5 The vision for rural areas is to view communities as groups of settlements rather than as individual places so that the needs of local residents can be met. Whilst the PJUDP seeks to ensure that each settlement maintains its own identity, the role and identity of settlements are to be mutually dependant and are to contribute towards the achievement and maintenance of sustainable communities. The development strategy recognises there are environmental limits to the level of development which can take place within the National Park and therefore anticipates that *“a higher rate of development will be provided for in the south-east of the County outside the National Park”* (PJUDP, 4.3.8).

2.6 The CUDP ‘Sustainable Strategic Settlement Framework’ identifies three Urban Growth Areas, 18 further key settlements (divided into secondary and tertiary settlements) and 51 village clusters. This framework is used to set out the location of future growth and to define the roles for each tier of settlement. Future development is to be focussed in those areas which already have a range of facilities and services (i.e. growth areas and secondary settlements) as a basis for the achievement of more sustainable forms of development and land use.

2.7 As an established urban area and tier 1 settlement, Carmarthen is one of the identified growth areas. The UDP recognises the role Carmarthen plays in providing *“a range of higher order services and facilities including in most instances further education, secondary schools, primary healthcare, regional employment and retail centres and a wide range of recreation facilities”* (CUDP, 1.52). The Secondary settlements include all the tier 2 settlements and Newcastle Emlyn (tier 3); these are located on *“sustainable transport corridors”* and have a range of facilities and services which provide for a wider rural catchment area. The CUDP therefore identifies these settlements as the most appropriate location for future development of a *‘suitable scale’*. Tertiary settlements provide retail and services which fulfil more local day to day needs and have a community focus. The 51 village clusters are seen as independent interdependent to a point and thus future development allocations are made within the context of the cluster rather than individual settlements (CUDP, 1.46-1.64).

2.8 These strategies both fit with the aspirations of the Wales Spatial Plan to focus future growth in the three strategic hubs of the Haven Towns, Carmarthen and Fishguard and Goodwick and to ensure that the urban centres can sustain a high level and quality of retail, leisure and services. In addition, there is a level of complementarity between the approach to rural areas in each of the Unitary Development Plans; they both consider groups of settlements (rather than individual settlements) as the basis for the delivery of local services and facilities. This is important in contributing towards a greater level of sustainability and in helping to support the role and function of the larger centres as the main foci of activity and development.

The Strategic Vision for the Location of Future Growth

2.9 The objective of both of the UDPs is for a more sustainable pattern of development which minimises the need for travel by improving access to public transport, employment, services and amenities. These policies reflect the twin aims of the Wales Spatial Plan of *‘emphasising key settlements’* whilst also *‘revitalising and sustaining smaller centres and communities’* (WSP, Housing).

Housing

2.10 PJUDP proposes that 70% of the total dwelling requirements for the County should be met in key tier 1 and 2 settlements (with the exception of Tenby in the PCNPA) and the remainder apportioned between sustainable communities comprising of groups of smaller settlements. Housing development within the National Park is to be concentrated into recognised settlements and should be directed to meet local needs (PJUDP, 5.4). The CUDP adopts a similar approach in that new housing development in Carmarthenshire is to be distributed in accordance with the hierarchy contained in the Sustainable Strategic Settlement Framework (CUDP, 4.03).

Employment

2.11 The PJUDP aims to diversify Pembrokeshire's economy by identifying strategic sites for employment development within the 'economic corridor', the industrial area of Milford Haven and other key regeneration areas where appropriate brownfield land is available. It is envisaged that large scale employment development should take place in accessible locations close to the key settlements but not within the National Park. Small scale employment development will be permitted close to settlements and may be appropriate in rural areas (PJUDP, 5.1).

2.12 The CUDP aims to ensure an adequate provision of employment land and premises to meet industrial and commercial needs. The aim is to create employment opportunities and to stimulate economic regeneration. Employment land is identified in major settlements and small-scale employment opportunities will be promoted in rural settlements as appropriate. Development in this area will be bolstered by improvements to the transport infrastructure to ensure sufficient access to markets (CUDP, Section 5).

2.13 The objectives of economic diversification that are contained within each of the Unitary Development Plans reflects that of the WSP which similarly recognises the need to diversify the economic base of the Spatial Plan Area, attract inward investment and develop local businesses. This complementary approach will be important in ensuring that the necessary actions might be taken to strengthen and diversify the economy of the Spatial Plan Area.

Retail

2.14 As the sub-regional centre for the County, the PJUDP supports the provision of additional retail and leisure facilities both within and at the edge of Haverfordwest town centre (PJUDP, Policy 30). Policy 31 states that suitable retail and other associated town centre development will be permitted in the town centres of all the key (tier 1 and 2) settlements identified in the Wales Spatial Plan providing that the primary retail function of the centres would be protected.

2.15 The retail policies within the CUDP seek to maintain Carmarthen as the principal town centre within the Spatial Plan Area and the role of the other town and local centres as important shopping locations. It also designates Parc Pensarn in Carmarthen as a District Centre suitable for further large retail warehouses and leisure facilities. The aim is to encourage the co-location of retail facilities and support sustainable transportation (CUDP, Policy R10).

2.16 In respect of retail allocations, the PJUDP specifies Kilgetty as the location for an additional quality foodstore in order to fulfil both quantitative and qualitative need (Policy 34). The CUDP is less prescriptive, although Policy R7 promotes the location of additional convenience floorspace in identified secondary settlements, subject to proposals being of a suitable scale and location, in order to improve accessibility and to promote sustainable travel. In addition, Policy R8 provides for the development of further large scale foodstores in Carmarthen so long as any such proposals would accord with relevant policy tests and would not prejudice the retail strategy for the location of convenience floorspace in secondary centres.

2.17 Although the Wales Spatial Plan does refer to retail uses in detail, these UDP policies are important in recognising the important retail roles of Haverfordwest and Carmarthen (WSP, 18.7) and in encouraging more sustainable access to facilities and services (WSP, 13.3).

Tourism / Leisure

2.18 The PJUDP and the CUDP both recognise the local importance of tourism and seek to develop the tourist industry in order to provide new employment opportunities, diversify the economy and provide additional services for local residents. Whilst the PJUDP specifies that large-scale tourism development should be located within settlements with over 1,000 people (PJUDP, policy 18), the CUDP states all major tourism development should primarily focused upon Carmarthen and the secondary settlements (CUDP, policies TRS1 and TRS4). This supports sustainable transportation objectives and ensures development is appropriate in scale to the local area. Major tourist development is not generally considered to be appropriate within the Pembrokeshire Coast National Park and loss of tourist accommodation in this area is to be resisted (PJUDP, policy 21).

2.19 Both UDPs consider that tourism development in the countryside and within smaller settlements can be acceptable but that it should be appropriate in scale and impact (CUDP, policy TRS1; PJUDP, Policy 19). Whilst tourist development should preferably be located within settlement boundaries in the interests of sustainable transportation, the UDPs recognise that, given the role of the natural environment as a key element of the local tourist offer, certain developments may require a countryside location. Relevant criteria are set out in the policies to provide a basis by which tourism proposals in rural areas might be appraised (PJUDP policy 19; CUDP policy TRS3).

2.20 The Wales Spatial Plan recognises the importance of tourism for the Pembrokeshire-The Haven Spatial Plan Area and establishes the development of an all-year, high quality tourism and leisure sector as a key strategic priority for the area. The UDP policies support the Wales Spatial Plan's aspirations in respect of tourism and provide an important mechanism by which the identified objectives might be realised.

Public services (health, education and emergency services) / Community Facilities

2.21 The PJUDP and CUDP both permit the development of community facilities in accessible locations in order to serve the needs of all sections of the local community and resist the loss of community facilities wherever possible (PJUDP, policy 124; CUDP, policies C1 – C3). The CUDP further states that planning obligations should be used to ensure that new residential developments are supported by community facilities appropriate to the scale and nature of the development (CUDP, policy C4).

2.22 The primary objectives of the Wales Spatial Plan include building sustainable communities, achieving sustainable accessibility and improving access to public services and community facilities by locating new proposals in or close to key settlements. Good public transportation is considered to be a key component to this (para 10.7 and 13.1). The policies of the PJUDP and CUDP provide an important basis by which these objectives can be realised – as part of new residential development, by the direct provision of services pressure for the public sector and through the protection of services and facilities against competing land uses.

Transport Connections

2.23 In order to enhance the sustainability of land uses within the Spatial Plan Area, new development is to be focussed in the main settlements of Pembrokeshire and Carmarthenshire, preferably in locations accessible by a range of modes of transportation (PJUDP, 7.1.2 and policy 100; CUDP, policy T1). Whilst the UDPs seek to make full use of existing transport networks and to reduce the level of reliance upon the private car, it is recognised that the rural character of the local area means that car travel is likely to remain a dominant form of transportation. In spite of this, both UDPs support the improvement of public transport infrastructure and facilities and promote the development of a cycle route network (PJUDP, policy 97, 98 and 105; CUDP, policy T8 T10, T14). These objectives reflect the vision for the Spatial Plan Area that is contained within the Wales Spatial Plan.

2.24 Proposed transportation improvements included in the UDPs are largely derived from the Local Transport Plans for the respective authorities and the strategic routes identified in the WSP. Strategic transport links are identified between the eastern and western parts of the Spatial Plan Area and through to the ferry ports at Pembroke Dock and Fishguard (PJUDP, 7.1.1; CUDP, 7.12). The WSP views the improvement of these strategic links as essential to the regeneration of the Area's economy and employment base and overcoming the issues associated with its peripheral location. Whilst the PJUDP considers the development of the road network to be appropriate where there is a strategic or local need, policy 94 states that a 'compelling need' should be demonstrated in the National Park and that alternative options should be fully considered.

Conclusion

2.25 The location of future growth set out in the PJUDP and CUDP largely reflects a traditional view of the settlement hierarchy. Future growth (both in terms of new housing and other facilities and services which an additional residential population may require) is to be focussed in the key settlements identified by the Wales Spatial Plan. As such, these key centres are likely to play an increasingly important functional role to surrounding settlements. A more appropriate scale of housing provision and other forms of development is supported in smaller settlements.

2.26 Haverfordwest and Carmarthen are appropriately identified as the sub-regional and regional centres and the main foci for future growth. However, little indication is given as to how these centres may fulfil complementary roles. The PJUDP gives greater consideration to the complementary roles of different settlements by identifying both the current roles and aspirations for different tiers of settlements in the hierarchy and the main settlements themselves. Whilst Carmarthenshire's Sustainable Strategic Settlement Framework carves out complementary roles between different tiers of the hierarchy little consideration is given to the complementarity between settlements of a similar size. Furthermore, there is an inconsistency between Newcastle Emlyn's designation as a *'secondary settlement'* in the UDP and its classification as a local centre (tier 3).

2.27 In the context of this policy position which supports the enhancement of settlements and the Spatial Plan Area as a whole, and as work on LDP preparation continues, this study provides an important and timely review of the roles of and relationships between the settlements and hubs within the Spatial Plan Area and an important opportunity to identify the ways in which the settlements might be able to work together in a more complementary manner, to the overall benefit of the Pembrokeshire-The Haven Spatial Plan Area.

3.0 Population

3.1 Whilst the subsequent chapters relate to different themes and topics, they are drawn together in the way that they shape the role and function of the various settlements and their its importance in relation to the hubs and the Spatial Plan Area. They are also drawn together by the common theme of their role in serving the local population and visitors to the local area. It is self evident that the scale and nature of facilities that are available in any area is a function of the level of demand. As has been detailed in the introduction to the main report, a key characteristic of the Pembrokeshire Haven Spatial Plan Area is the fact the main settlements are expected to perform a role and function in respect of the provision of employment and service functions that would normally be associated with larger centres. This is because of the geography of the area and the distribution of the population. However, regardless of the particular requirements that are placed upon each settlement, it is necessary that they serve the local population.

3.2 For this reason, a starting point of our analysis must be a clear understanding of the nature and distribution of the local population and an appreciation of the scale and nature of its anticipated future growth. This understanding of how many people live in the different hubs and settlements can then inform an appreciation of the demand for and distribution of different types of services and facilities and can provide an essential basis for the development of more complementary roles and relationships.

3.3 Data analysed in this section derives from two key data sources:

a The Welsh Assembly Government 2006-based population projections have been used to show the baseline (2006) population and population projections for the Pembrokeshire. The Haven Spatial Plan Area as a whole; and,

b Experian's MMG3 Retail Planner 2006 has been used to provide baseline population and population projections for the three hubs and the key settlements within the Spatial Plan Area.

3.4 This data selection was designed to achieve an understanding of current and anticipated population levels at the different spatial scales that are relevant to this study. It thereby provides the basis for a reliable indication of anticipated population change within the Spatial Plan Area which will inform an understanding of current and future levels of complementarity and will help to shape the necessary resultant policy recommendations and decisions.

3.5 Our analysis of population data uses Lower Super Output Areas (LSOAs) to approximate the geographical extent of the hubs and settlements within the Spatial Plan Area, based upon information provided by the Welsh Assembly Government regarding the make-up of settlements by LSOA. Although it is not possible to obtain reliable population data for every town and village in the

Spatial Plan Area, this approach has allowed us to assess the following settlements:

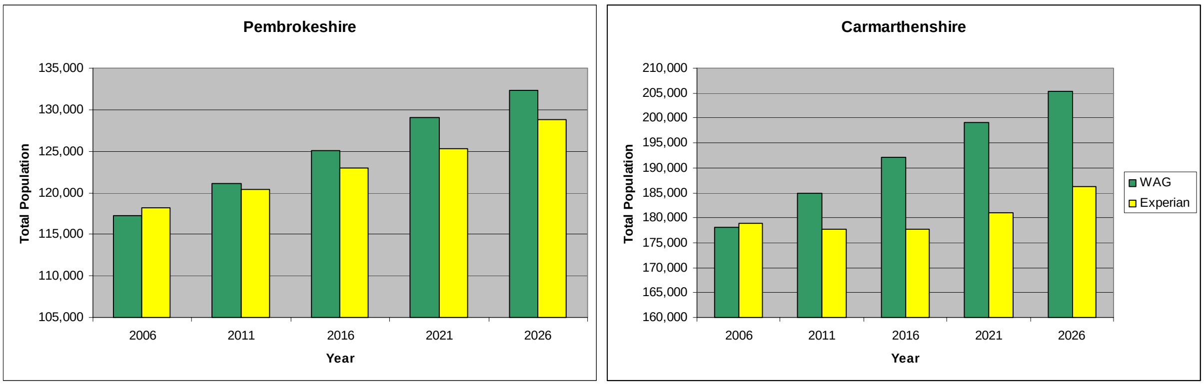
Settlement	Wales Spatial Plan Status	Hub
Carmarthen	Primary Key Settlement	Carmarthen
Haverfordwest	Primary Key Settlement	Haven Towns
Milford Haven	Primary Key Settlement	Haven Towns
Pembroke	Primary Key Settlement	Haven Towns
Pembroke Dock	Primary Key Settlement	Haven Towns
Neyland	Primary Key Settlement	Haven Towns
Fishguard	Key Settlement	Fishguard
Goodwick	Key Settlement	Fishguard
Narberth	Key Settlement	
St Clears	Key Settlement	
Tenby	Key Settlement	
Newcastle Emlyn	Local Centre	
Saundersfoot	Local Centre	
Johnston	None	Haven Towns

Table 1 Settlements included in population analysis

Benchmark Comparison of WAG and Experian Projections

3.6 Given that the latest Welsh Assembly Government 2006-based population projections have been undertaken at a County level – and not at a settlement level (although the Assembly Government has used this basis to calculate population forecasts on a Spatial Plan Area basis) – Experian projections have been used to estimate the future total population and population structure of the hub and key settlements in the Pembrokeshire Haven Spatial Plan Area. In order to appraise the validity of these forecasts, it is important to consider how they compare with the Welsh Assembly Government projections. The County areas of Pembrokeshire and Carmarthenshire represent suitable areas for comparison given that data is available at this scale from the Welsh Assembly Government forecasts and Experian and should be consistent by both sources.

3.7 Experian employs 2001 census data to inform its population projections. The census information is adjusted by mid-year estimates to model smaller-scale changes over time. A comparison of each set of population projections for Pembrokeshire and Carmarthenshire is set out below:

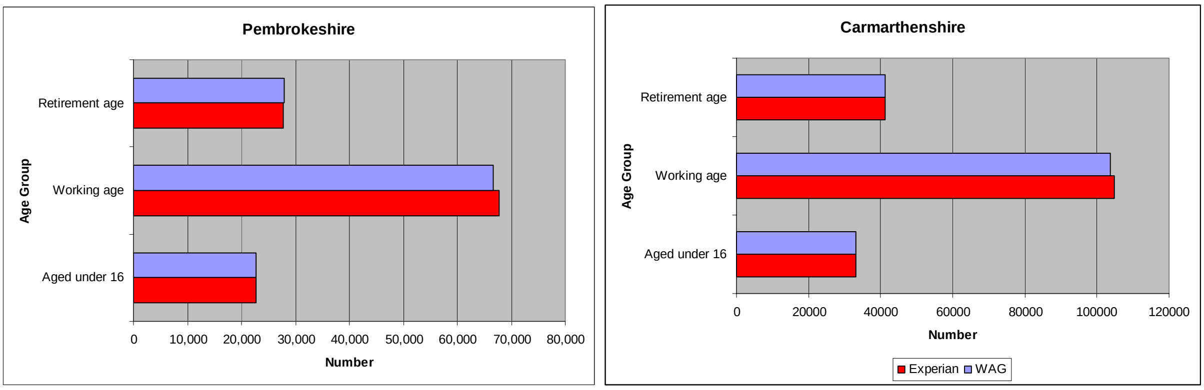


Sources: WAG 2006-based Population Projections and Experian Retail Planner 2006

Fig 1 WAG and Experian Population Projections for Pembrokeshire and Carmarthenshire - 2006 to 2026

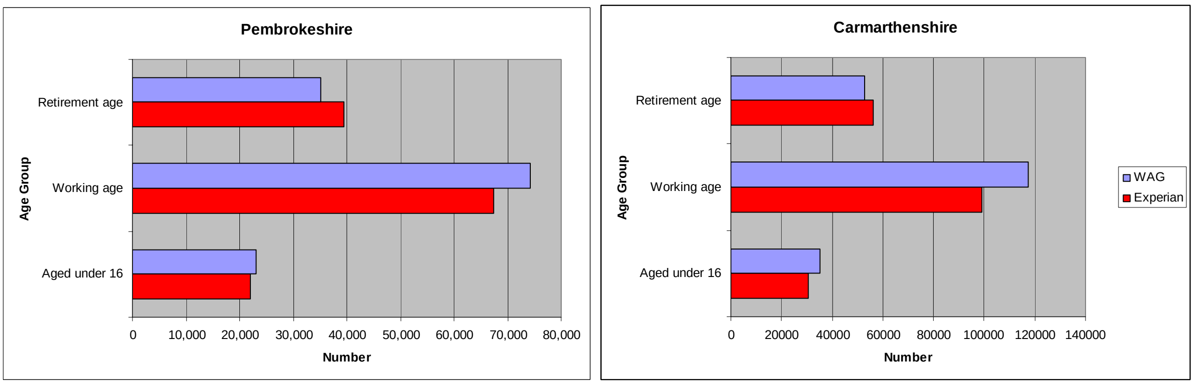
3.8 There is some discrepancy between the projections provided by WAG and Experian. Whilst the Experian estimates of the 2006 population are only slightly higher than those of the Welsh Assembly Government, the Welsh Assembly Government's projections forecast a higher rate of population increase to 2026. The differences between the two forecasts are smaller for Pembrokeshire than for Carmarthenshire (3.0% difference for Pembrokeshire by 2026 compared to 10.7% difference for Carmarthenshire over the same time period).

3.9 These differences in the forecast level of total population change over the period to 2026 also translate to differences in the anticipated population composition over the same timeframe. Again, there are only small differences in the stated population structure set out in the two 2006 estimates, although Experian estimates that there will be a lower number of children and working age people by 2026 than is suggested by the Welsh Assembly Government figures. As a result of this, the Experian projections for the retirement population in 2026 are higher than the Welsh Assembly Government figures with the absolute differences greater for Carmarthenshire than for Pembrokeshire.



Sources: WAG 2006-based Population Projections and Experian Retail Planner 2006.

Fig 2 WAG and Experian Current Population Structures for Pembrokeshire and Carmarthenshire - 2006



Sources: WAG 2006-based Population Projections and Experian Retail Planner 2006.

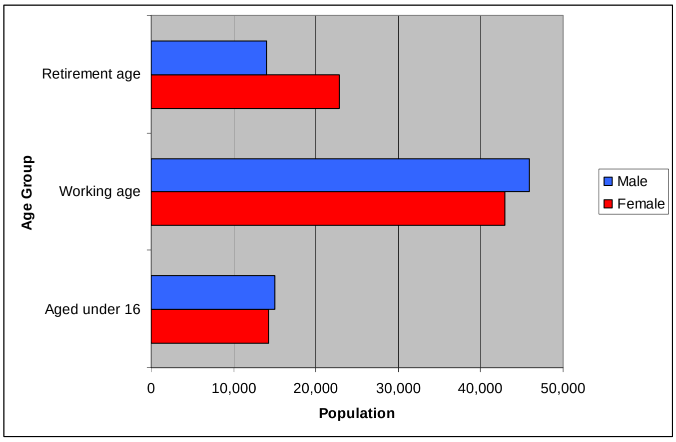
Fig 3 WAG and Experian Projected Population Structures for Pembrokeshire and Carmarthenshire – 2026

3.10 Although the absolute differences in population will be less at a smaller geographical scale, this comparison shows that there are limitations to the Experian data provided for hubs and settlements. However, in spite of these difficulties, it is important to recognise that this remains the most accurate information that is available at a settlement and hub level. As such, it provides a very useful insight into the anticipated future changes in population at a localised level across the Spatial Plan Area and the extent to which this will influence the future roles and functions of different hubs and settlements.

The Current Population of the Spatial Plan Area

3.11 The Welsh Assembly Government estimate the population of the Pembrokeshire Haven Spatial Plan Area in 2006 was 154,900, only 5.2% of the 2.97 million people estimated to be living in Wales (WAG, 2008).

3.12 The map of population density across the Pembrokeshire – The Haven Spatial Plan Area in 2001 (Appendix 1) reinforces the view of the Spatial Plan Area as rural in nature with a subsequent low population density of 0-2 people per hectare over most of its extent. The highest population densities (over 8 people per hectare) are located in the Carmarthen, Haven Towns and Fishguard Hubs. However, the (tier 2) Key Settlements also contain smaller areas of high population density, as do the Local (tier 3) Centres of Saundersfoot, St Davids, Kilgetty, Laugharne, Newport and Newcastle Emlyn. Medium population densities of 2-8 people per hectare are located towards the edges of the key settlements, particularly along key transport routes, as well as in the smaller settlements.



Source: 2006-based population projections for the areas identified in the Wales Spatial Plan

1. Working age and retirement age projections take account of the planned changes to the State Pension Age.

Fig 4 Population Structure in Pembrokeshire - The Haven Spatial Plan Area - 2006

3.13 In 2006 18.9% of the total population in the Spatial Plan Area were under 16 whilst 23.9% were of retirement age. This highlights the trend that the Spatial Plan Area is showing an ageing population structure. 57.8% of the population were of working age with a high proportion of dependents at 42.7%. This is high, particularly as this is only a broad estimate based on age groups rather than reflecting the total number of economic dependents within the working age population. Such a demographic pattern can have major implications upon the demand for various facilities and services within the Spatial Plan Area, the economic strength of the area and upon the particular roles of different settlements.

3.14 Whilst the number of females under 16 and of working age is 2.4% less than males, there are 5.7% more females than males of retirement age. Longer life expectancy amongst females is often attributed to differences in lifestyle factors and can help to explain this higher figure.

Socio-Economic Status in Pembrokeshire – The Haven

3.15 An understanding of the socio-economic status of the population within the Spatial Plan Area can be achieved by reviewing employment activity rates and occupational groupings. This data cannot, however, be reliably forecast for the future period to 2026.

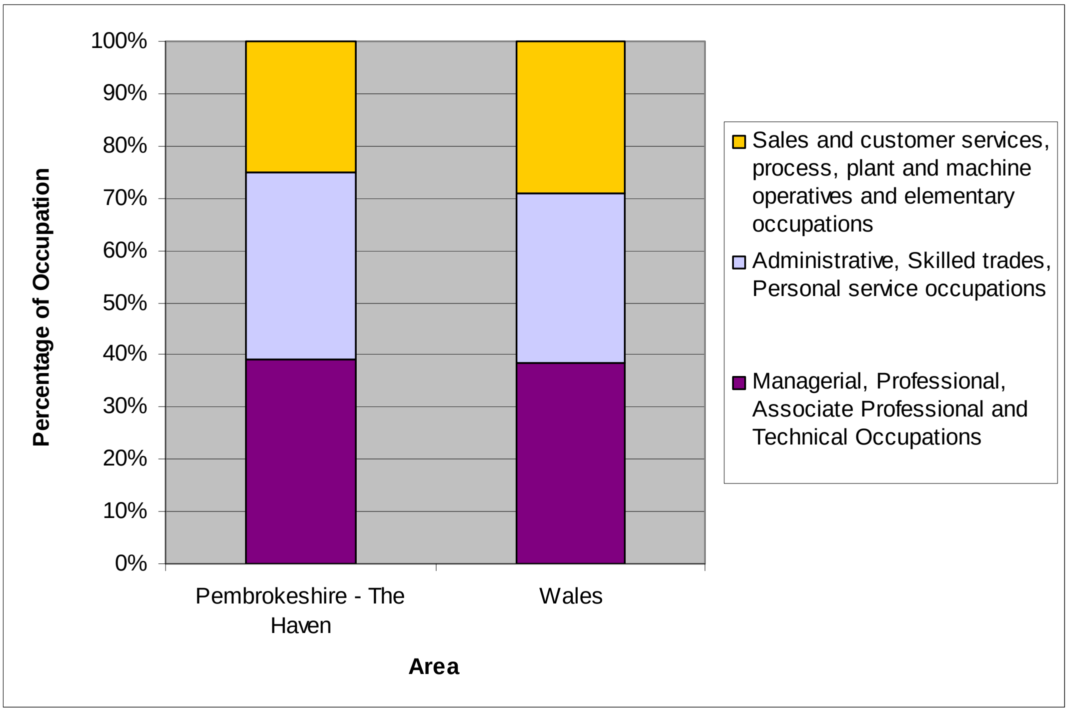
3.16 The table below indicates that the employment rate in Pembrokeshire – The Haven is higher and the unemployment rate therefore lower than the Wales average.

Economic Activity	2007 - Pembrokeshire - The Haven	2007 - Wales
Labour market rates:		
Employment rate	74.4%	71.1%
Unemployment rate	4.2%	5.6%
Economic inactivity rate (excluding students)	19.8%	21.3%
Economic inactivity rate (including students)	22.3%	24.5%

Source: www.statswales.gov.uk/All Reports/Public Reports/Wales Spatial Plan Area/ Pembrokeshire Haven/Economy and labour market

1. Taken from Local Labour Force Survey/ Annual Population Survey, office for National Statistics

Table 2 Economic Activity in Pembrokeshire - The Haven in 2007



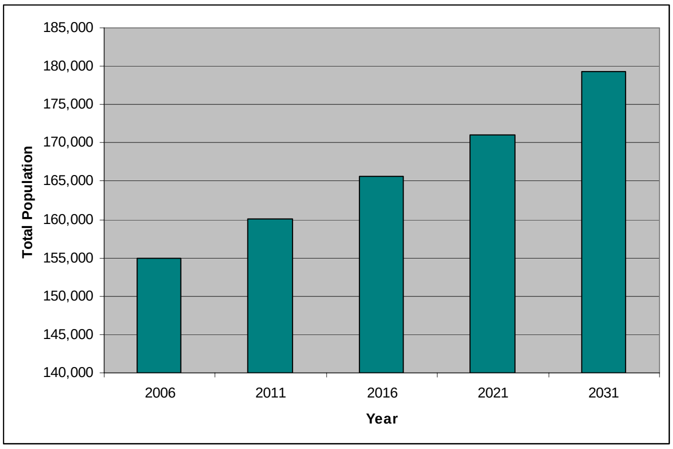
Source: Local Labour Force Survey/ Annual Population Survey, Office for National Statistics

Fig 5 Occupation Groupings for Pembrokeshire - The Haven in 2007

3.17 The occupational groupings in Pembrokeshire – The Haven are largely reflective of the Wales average. Whilst the percentage involved in managerial, professional and technical occupations and administrative, skilled and personal service occupations are slightly higher than the Wales average, the percentage in sales, customer service and elementary occupations is lower.

Population Projections for the Spatial Plan Area

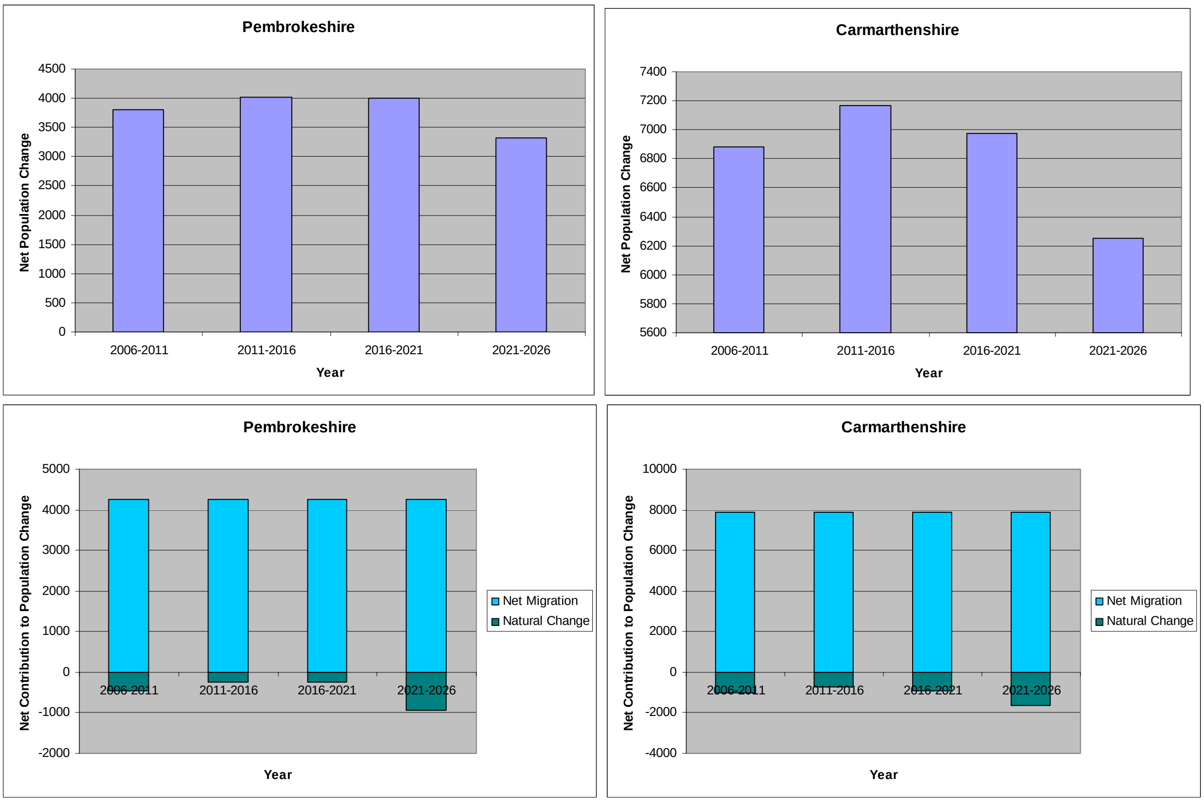
3.18 This section examines the population projections and structures for the Pembrokeshire – The Haven Spatial Plan Area between 2006 and 2031 to show how the Welsh Assembly Government anticipates the population will change over time. Welsh Assembly Government estimates are not available for 2026.



Source: WAG 2006-based population projections for the areas identified in the Wales Spatial Plan

Fig 6 WAG Population Projections for Pembrokeshire - The Haven

3.19 The total population of the Spatial Plan Area is projected to steadily increase from 154,900 to 179,300 between 2006 and 2031 – an addition of 24,400 people (15.75%). The initial increase from 2006 to 2011 is 3.4% over 5 years, with the highest rate of growth being 3.5% between 2011 and 2016. The rate of growth is then anticipated to slow with an increase of only 4.9% over 10 years between 2021 and 2031.



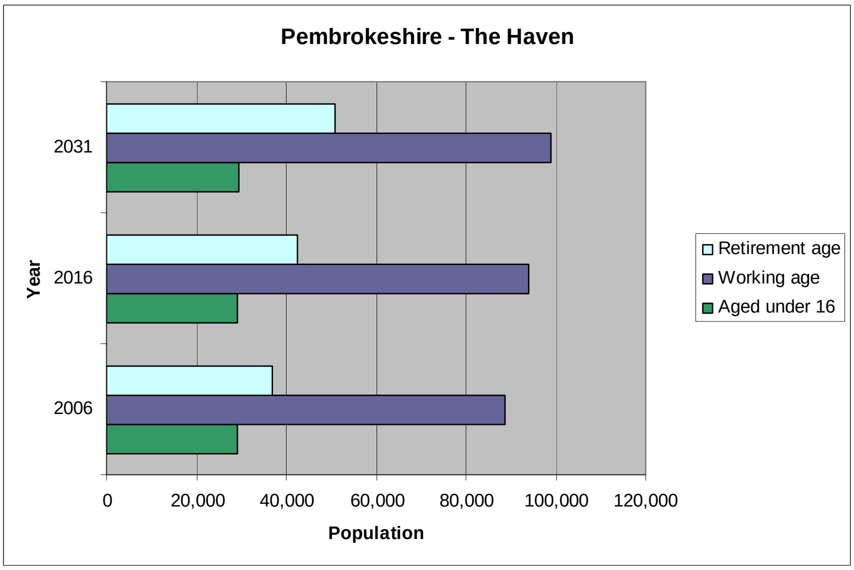
Sources: WAG 2006-based Population Projections

Fig 7 Components of population change in Pembrokeshire and Carmarthenshire- 2006 to 2026

3.20 The above graphs show the components of population change in Pembrokeshire and Carmarthenshire which form the basis for the Spatial Plan projections. In both Pembrokeshire and Carmarthenshire it is anticipated that population growth will be due to in-migration rather than natural change; in fact in-migration will counter-balance a small natural decline in population in both counties.

3.21 92% of in-migration in Pembrokeshire is national migration whereas in Carmarthenshire estimates of net migration consist of 8,255 migrants from elsewhere in the UK, set against a loss of 365 people emigrating overseas from the county in every 5 year period.

3.22



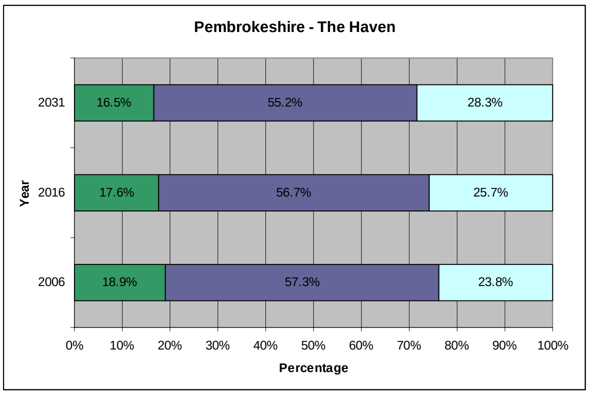
Sources: WAG 2006-based population projections for the areas identified in the Wales Spatial Plan.
1. Working age and retirement age projections take account of the planned changes to the State Pension Age.

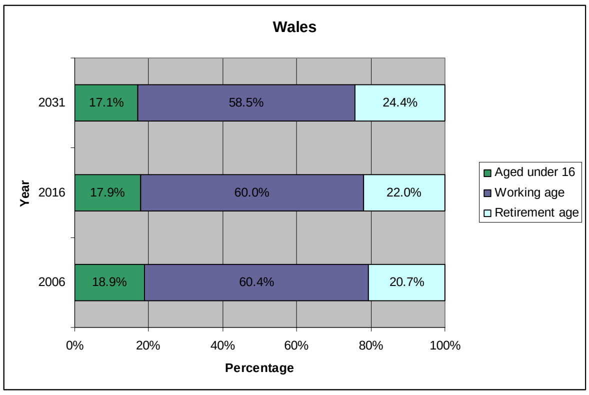
Fig 8 Population of Different Age Groups of Pembrokeshire - The Haven in 2006 and Projected Structure in 2031

3.23 Figure 8 indicates that the under 16 population of the Spatial Plan Area is expected to decrease by 200 between 2006 and 2016 and then increase by 500 between 2016 and 2031. These changes will have implications for services related to young people and children, such as maternity and paediatric facilities in hospitals and doctor surgeries as well as for education, leisure and open space provision.

3.24 The total number of adults of working age is expected to increase steadily by 10,100 between 2006 and 2031. The provision of adequate tertiary education, adult education and employment opportunities for this steadily growing sector of the population will be important, particularly given the continuing high dependency levels within the Spatial Plan Area as a whole and the stated vision for the area to be *"a network of strong communities supported by a robust, sustainable, diverse, high value-added economy"*. The achievement of this vision will necessitate an adequate provision of job opportunities, an increased level of self-containment of workers and, if possible, improved levels of alignment between the location of housing and employment opportunities.

3.25 There is projected to be an additional 14,000 adults of retirement age by 2026 in the Spatial Plan Area. This projection re-enforces the current trend of an increasingly ageing population and will have major implications for the provision of health services such as long-term care and hospices and specialist residential provision. In view of issues relating to the personal mobility of older people, this anticipated population change will also have implications in respect of the need for local retail and leisure and public services particularly to serve the needs of those that are unable to travel to more distant, larger centres.





Sources: WAG 2006-based population projections for the areas identified in the Wales Spatial Plan and 2006 National Population Projections

1. Working age and retirement age projections take account of the planned changes to the State Pension Age.

Fig 9 Population Structure of Pembrokeshire - The Haven and Wales in 2006 and Projected Structure in 2031

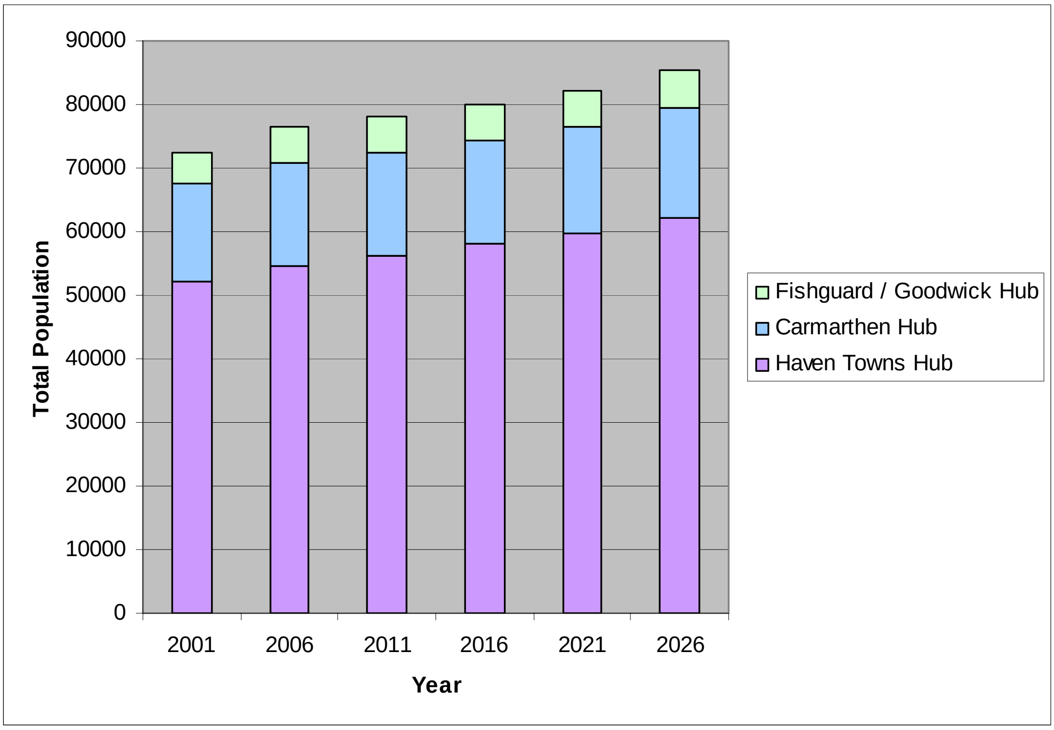
3.26 In 2006 the percentage of population under 16 was the same in the Pembrokeshire – the Haven Spatial Plan Area as for Wales generally. However, by 2031 this percentage is projected to fall to 16.5%, slightly lower than Wales overall. The percentage of working age population in the Spatial Plan Area in 2006 was slightly below that of Wales and is expected to decrease further to 3.3% less than Wales by 2031. Conversely, the percentage of retirement age in Pembrokeshire – The Haven was 23.8% in 2006 compared to 20.7% in Wales generally. This figure is expected to increase to 28.3% by 2031, remaining higher than national figure of 24.4%.

Spatial Distribution and Structure of Population by Hub

3.27 As explained above, population projections and structures at the hub and settlements level are derived from Experian MMG3 retail planner 2006. In view of the data limitations that are detailed in the introduction to this chapter, these figures must be viewed as indicative only albeit that this is the most reliable source of population projections at this very local level.

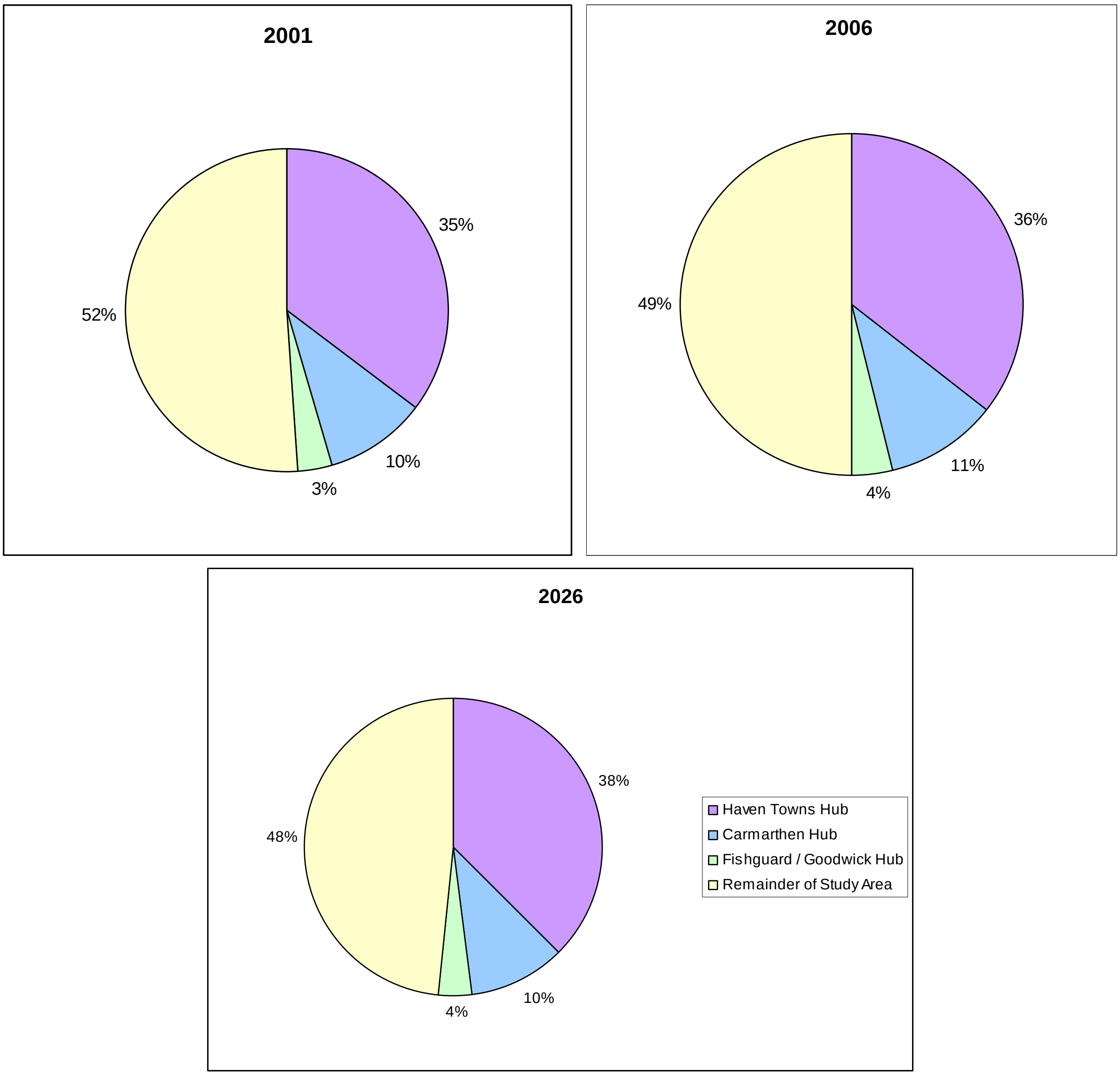
3.28 A total population of 153,246 in 2006 and 165,446 in 2026 is assumed for the Spatial Plan Area (derived from Experian estimates for Pembrokeshire and an approximation of the Spatial Plan Area of Carmarthenshire constructed from Lower Super Output Areas) to ensure comparable data is being used for percentage calculations.

3.29 Figure 10 illustrates the considerable significance of the Spatial Plan hubs as accommodating just under half of the population of Pembrokeshire-The Haven Spatial Plan Area. Between 2001 and 2006 the population living in all three hub areas increased by around 4,000; population projections indicate this will increase by a further 9,000 between 2006 and 2026. The Haven Towns hub increased by around 2,400 people between 2001 and 2006 and is projected to increase by a further 7,600 people to 2026. However, the Fishguard and Carmarthen hubs are only expected to experience small increases of 250 and 1,100 people respectively. This will have considerable implications upon population and resource allocation across the Spatial Plan Area as a whole.



Source: Experian Retail Planner 2006 – Lower Super Output Area Projections

Fig 10 Population Projections for Pembrokeshire - The Haven Hubs



Source: Experian Retail Planner 2006 – Lower Super Output Area Projections

Fig 11 Proportion of Pembrokeshire - The Haven Population Living in Hub Areas - 2006 and 2026

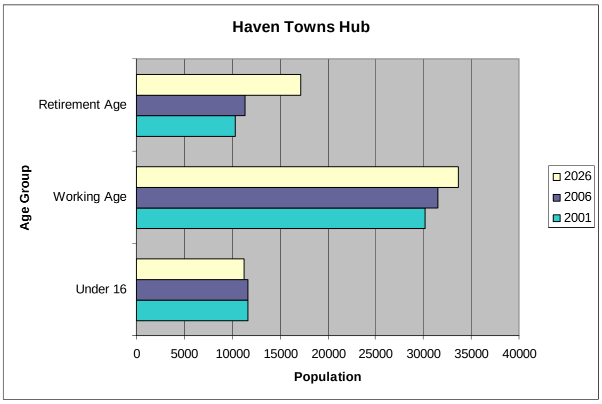
3.30 Figure 11 shows that the increase in population in the Haven Towns Hub is not merely the result of an overall increase in population but also a redistribution of where people are living. Between 2001 and 2006 the proportion of the total population for the Spatial Plan Area living in the Haven Towns hub increased by 1% and is anticipated to increase by 2% (from 54,500 to 62,100 people) between 2006 and 2026. Whilst the percentages living in the Carmarthen and Fishguard hubs increased by 1% between 2001 and 2006, the Carmarthen hub is anticipated to experience a decrease of 1% to 2026. The percentage living in the remainder of the study area declined by 3% from 2001 to 2006 and is expected to decline by a further 1% by 2026. In fact, whilst the percentage increase across the Spatial Plan Area is estimated by Experian to be 8.0%, the population in the Haven Towns hub it is estimated to increase by 13.9% between 2006 and 2026. The implication of this is that the Haven Towns Hub is expected to become an even more significant population centre within the Spatial Plan Area.

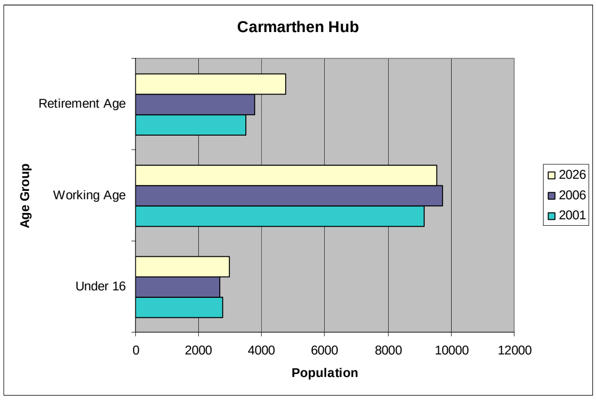
3.31 Although its population is forecast to increase from 16,200 to 17,300, the dominance of the Carmarthen Hub in terms of its role as a population centre will decline slightly. When considering population within this Hub, however, it is important to recognise that, in contrast to the Haven Towns Hub which includes 5 large towns and a number of villages, the Carmarthen Hub only includes Carmarthen town. Consequently, and as set out in the next section, Carmarthen is – and is expected to remain – the largest and most significant individual settlement in the Spatial Plan Area in population terms.

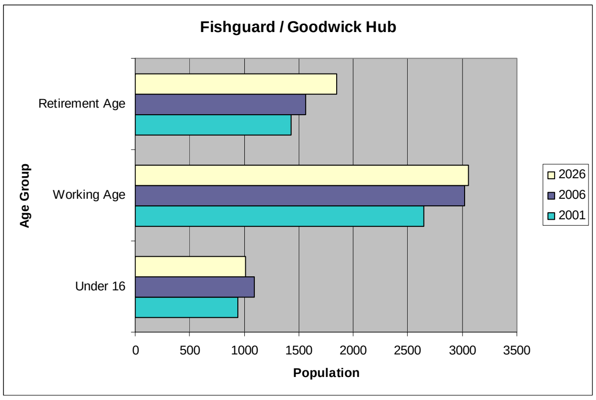
3.32 The population of the Fishguard Hub – which includes Fishguard and Goodwick – is forecast to increase from 5,700 to 6,000. It will continue to account for just 4% of the population of the Spatial Plan Area and, as such, will continue to serve a very limited role as a population centre.

3.33 Although these changes in the relative scale and importance of the different hubs are not significant, they will have an implication upon the need for facilities and services in each of the hubs and will thereby have a bearing upon the future complementary relationships that exists between them. As the range of services in a particular hub is improved to meet the needs of the local population, it will also improve the extent to which it is able to serve the wider area.

3.34 The following graphs compare the population structure of the three hubs in 2001 and 2006 with the projected population structure at 2026. In comparing the proportion of the population that are within each of the different age groups in each hub, it is important to recognise the impact of the overall population levels. The overall level of population in the Haven Towns Hub is such that there are substantially more people in each of the three age groups than in either of the other hubs. As set out above, this will have fundamental implications upon the need for, and the potential supply of, facilities and services. It will also impact upon the role of the different hubs and the relationships between them.







Source: Experian Retail Planner 2006 – Lower Super Output Area Projections

Fig 12 Population Structure of Pembrokeshire - The Haven Hubs in 2006 and Projected Structure in 2026

3.35 In 2001 and 2006 the Haven Towns Hub had the 'youngest' population structure of the three hubs with 21.5% under 16 and only 20.8% of the population of retirement age in 2006. In comparison the Carmarthen Hub had the highest proportion of working age population at 60.2% and lowest proportion under 16 at 16.5%. The Fishguard Hub had the highest percentage of dependent age groups with 19.3% under 16 and 27.6% of retirement age. However, this only accounted for 2,659 people within the dependant age groups, compared to 6,449 in the Carmarthen Hub and 23,074 in the Haven Towns Hub.

3.36 Between 2001 and 2006 only the under 16 population in the Carmarthen hub experienced a decrease in population. However, between 2006 and 2026 the under 16 population in the Fishguard and Haven Towns Hubs and working age population in the Carmarthen Hub are projected to decline; all other age groups will increase their population.

3.37 Carmarthen is the only hub that is forecast to experience an increase in the number of children by 2026 having decreased between 2001 and 2006. This increase of 300 people will have implications for child and youth related services. The Haven Towns Hub is projected to increase by 2,200 working age people between 2006 and 2026, resulting in an increased demand for new employment opportunities.

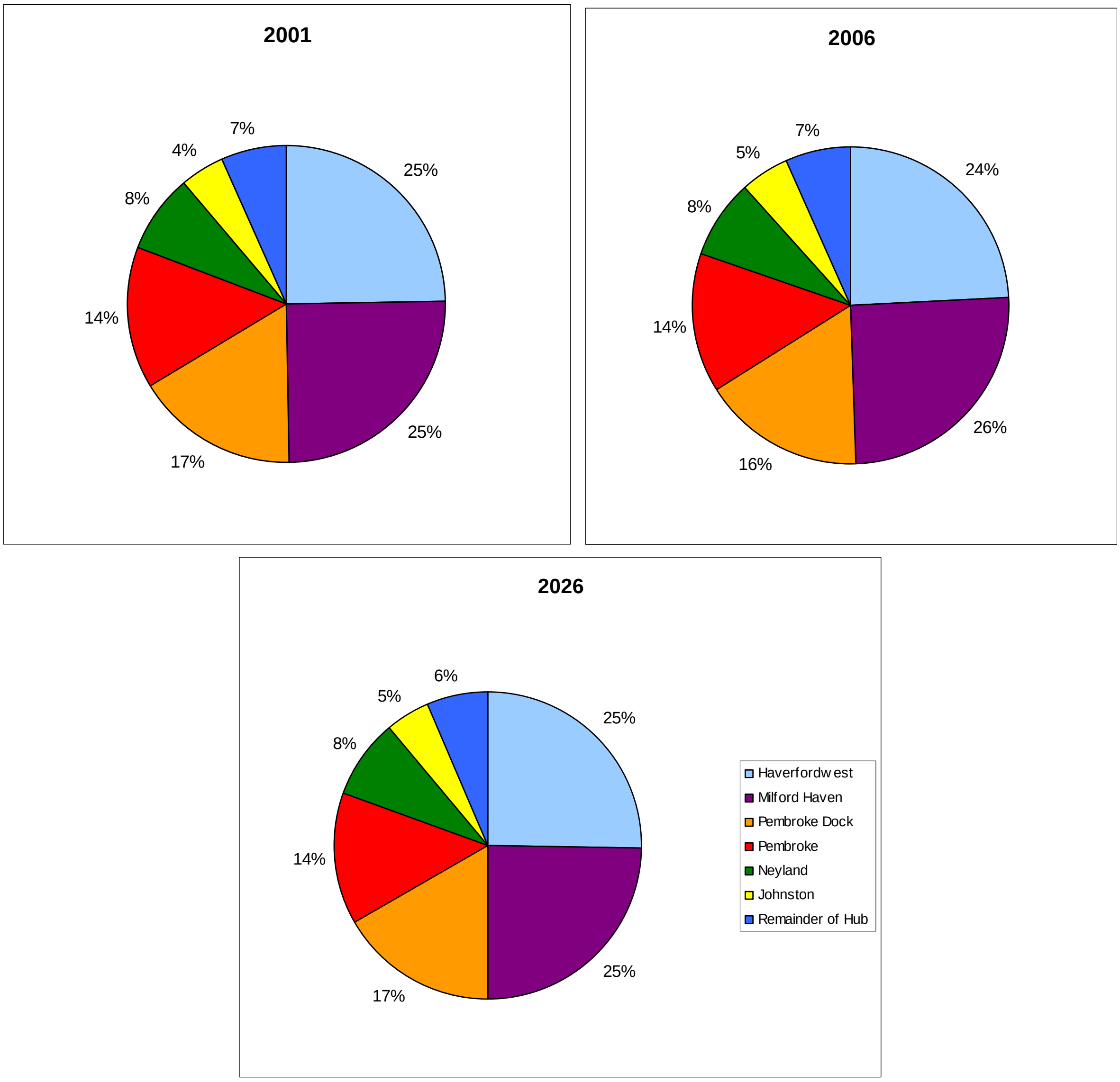
3.38 The population across all three hubs is projected to age quite substantially, increasing demand for elderly-related services. The Haven Towns are expected to experience the largest increase in retirement age population of 5,800, although smaller increases in the Carmarthen and Fishguard Hubs will represent increases of 26.0% and 17.9% respectively.

Spatial Distribution and Structure of Population by Settlement within the Hubs

3.39 The population within each hub is discussed in turn in this section in order to provide a more detailed understanding of the current and anticipated future population distribution.

The Haven Towns Hub

3.40 The graphs below show the proportion of the Haven Town Hub population living in different settlements of the hub and how this distribution is anticipated to change between 2006 and 2026.



Source: Experian Retail Planner 2006 – Lower Super Output Area Projections

Fig 13 Proportion of Population Living in Different Settlements of the Haven Towns Hub - 2006 and 2026

3.41 Haverfordwest and Milford Haven are the largest settlements in the Haven Towns hub accounting for almost half its population. In addition, Pembroke Dock and Pembroke together account for approximately 30% of the Haven Towns hub population.

3.42 Reflecting the anticipated substantial increase in population within the Haven Towns Hub as a whole, all of the settlements and other areas of the Haven Towns Hub increased in population between 2001 and 2006 and are expected to grow further between 2006 and 2026. The level of increase that is anticipated within all of the Haven Towns settlements is larger than in almost all of the other Spatial Plan Area settlements. The forecast population increase in Haverfordwest, for example, is over 2.5 times greater than that of Carmarthen and almost 20 times greater than that of Fishguard.

3.43 Between 2001 and 2006, Milford Haven experienced the greatest actual increase in population of 750 people whereas Haverfordwest grew by 450 people. The smaller centre of Johnston also experienced a significant increase in population growing by 475 (an increase of 21.2%).

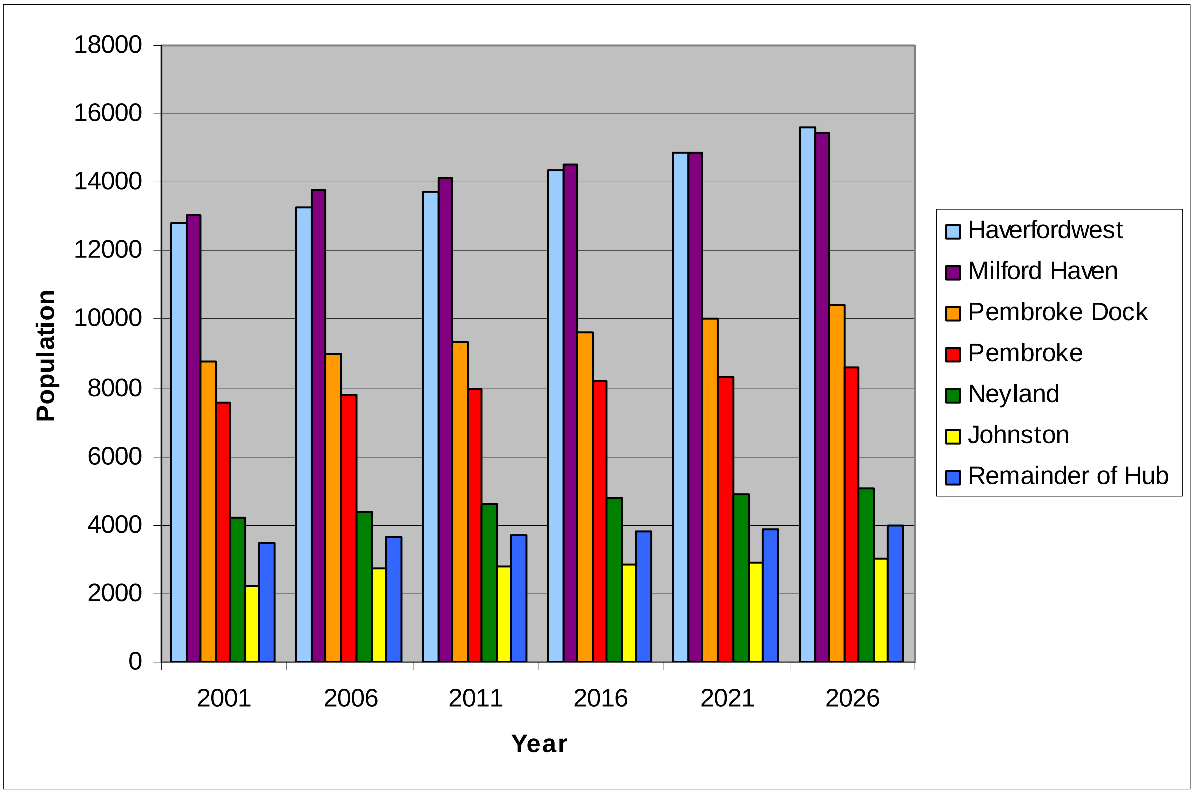
3.44 However, between 2006 and 2026 it is anticipated that the Haven Towns Hub will experience a different pattern of settlement growth. Haverfordwest is expected to increase its total population by 2,400 to 15,650. This is a relative increase of 17.9% — the largest level of increase of any of the towns. Although the anticipated rate of population increase is lower, Milford Haven is still expected to grow by 1,650 people (an increase of 12.0%) to 15,400. The implication of these changes is that Haverfordwest and Milford Haven will be broadly equitable in terms of their population by 2026.

3.45 Pembroke Dock and Neyland are projected to experience the second largest increases in population (15.8% in both settlements), whilst Pembroke, Johnston and the other areas within the Hub are forecast to experience a lower level of population growth. The implication of these changes is a slight increased concentration of population within the largest settlements.

Settlement	2006 Population	2026 Population	% Change
Haverfordwest	13255	15634	17.9
Milford Haven	13770	15416	12.0
Pembroke Dock	8995	10416	15.8
Pembroke	7781	8617	10.7
Neyland	4403	5098	15.8
Johnston	2719	2994	10.1
Remainder of Hub	3633	3964	9.1
TOTAL	54556	62139	13.9

Source: Experian Retail Planner 2006 – Lower Super Output Area Projections

Table 3 Forecast Population Change by Settlement 2006-2026



Source: Experian Retail Planner 2006 – Lower Super Output Area Projections

Fig 14 Projections for the Population of Settlements in the Haven Towns Hub - 2006 to 2026

The Carmarthen Hub

3.46 The Carmarthen hub comprises only of Carmarthen the settlement. It is therefore more instructive to examine relative changes between Carmarthen and the rest of the Carmarthenshire area of the Pembrokeshire – The Haven Spatial Plan Area in terms of population between 2006 and 2026.

3.47 Carmarthen experienced the greatest population increase of any single settlement between 2001 and 2006 – growing by over 800 people – a relative increase of 5.3%. However, Carmarthen is projected to experience a smaller increase in population than any of the settlements within the Haven Towns Hub to 2026. Although Carmarthen is forecast to remain the largest settlement within the Spatial Plan Area with a population of 17,300, the level of anticipated population increase over the period to 2026 is only 6.7%. The population of Carmarthen was almost 120% that of the largest of the Haven Towns (Milford Haven) in 2006 but it is expected that it will only be 110% that of the largest of the Haven Towns (Haverfordwest) by 2026. The implications of this change in terms of the relative importance of Carmarthen and the Haven Town settlements must be carefully appraised, albeit recognising that, despite a reduction in its relative size, Carmarthen is forecast to continue to be the largest population centre within the Spatial Plan Area.

3.48 Figure 15 indicates the proportion of the Carmarthenshire area of the WSP area living in Carmarthen increased by 1% between 2001 and 2006 and is set to increase by a further 1% between 2009 and 2026.

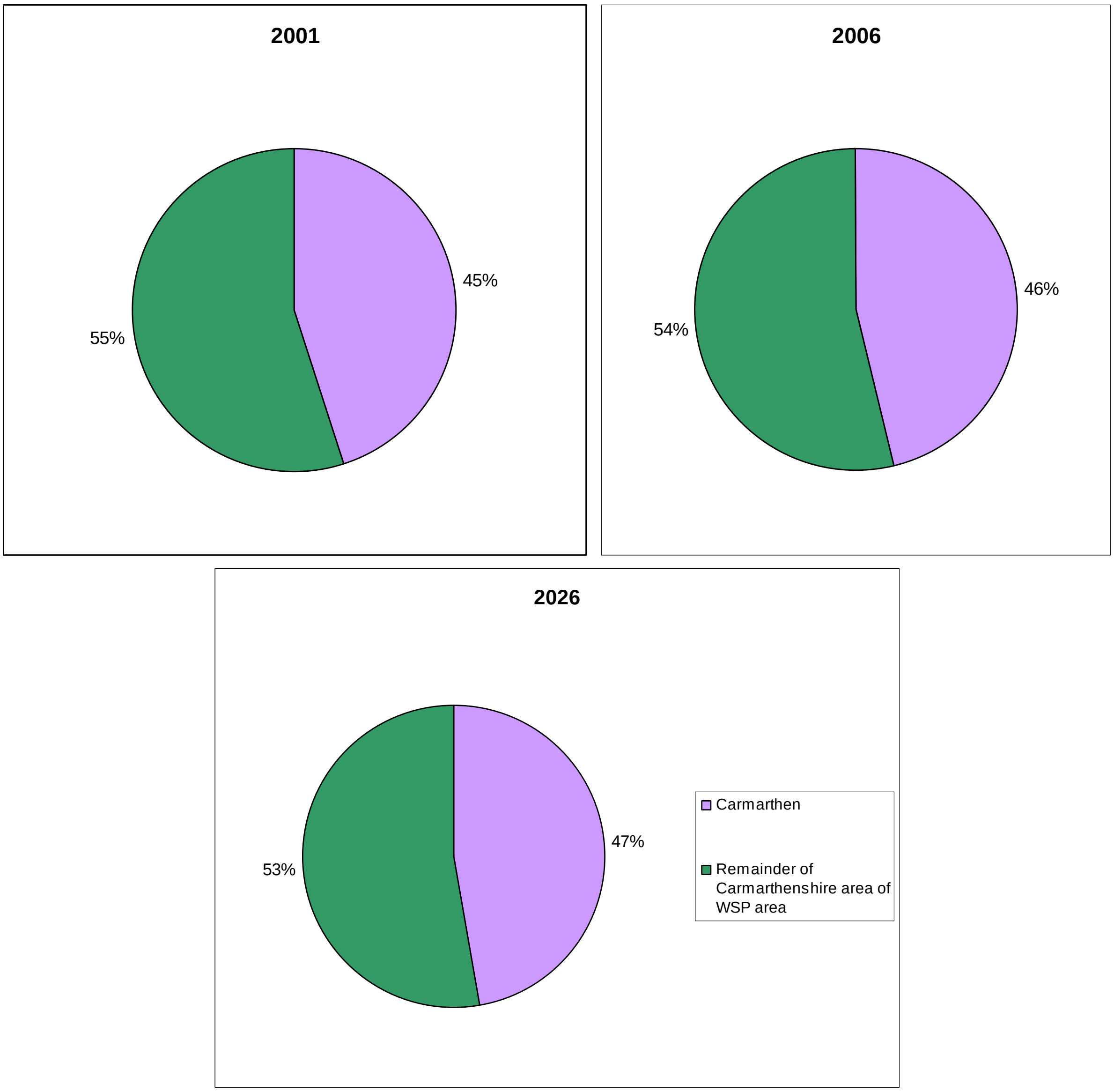
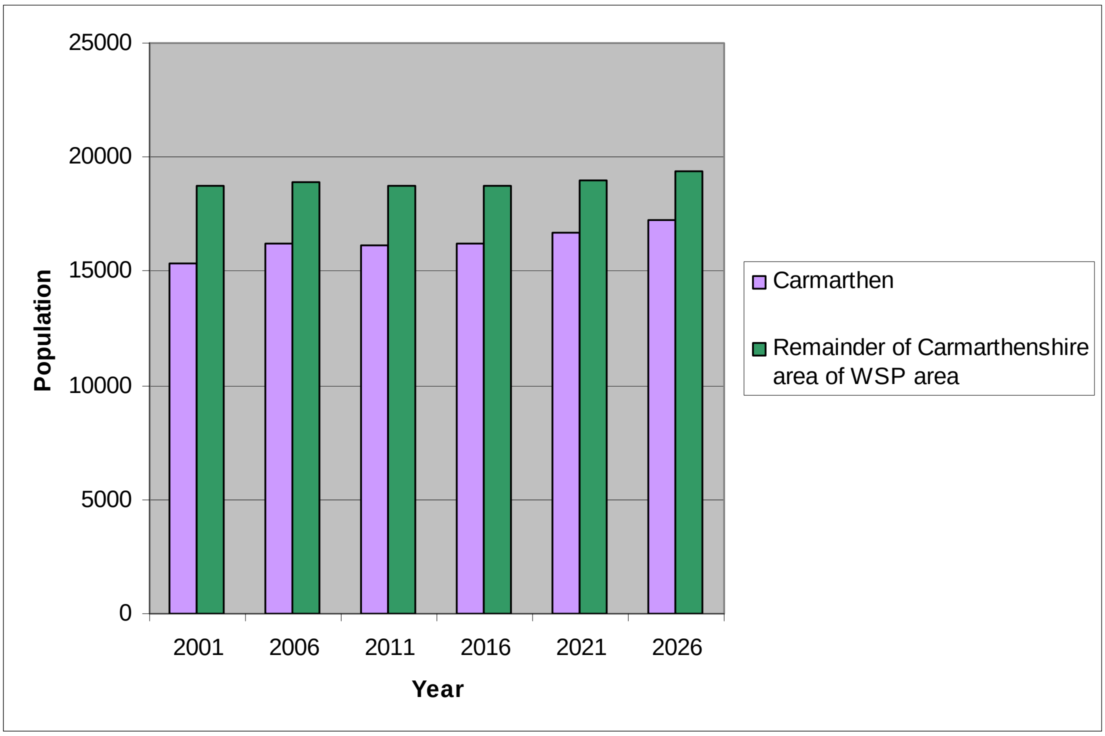


Fig 15 Proportion of Carmarthenshire Section of WSP Living in Carmarthen - 2006 and 2026



Source: Experian Retail Planner 2006 – Lower Super Output Area Projections

Fig 16 Population of Carmarthen Hub and Carmarthenshire Section of the WSP Area

Fishguard Hub

3.49 The Fishguard Hub is, and is expected to continue to be substantially smaller than the other hubs in population terms. Both Fishguard and Goodwick experienced significant population growth between 2001 and 2006, increasing their population by around 13%, although in actual terms this equated to a total increase of just 650 people in the Hub. Although Fishguard is forecast to remain the largest settlement within the Hub, its relative importance will decline by 2% between 2006 and 2026 because of an anticipated substantial increase in the population level in Goodwick – from 2,100 to 2,300, compared to a smaller increase from 3,580 to 3,610 in Fishguard.

3.50 Figure 18 suggests that the total population living in Fishguard will decline slightly between 2006 and 2016 before increasing again by a total of 30 between 2006 and 2026. By contrast the population of Goodwick is projected to grow steadily, increasing by a total of 210 between 2006 and 2026.

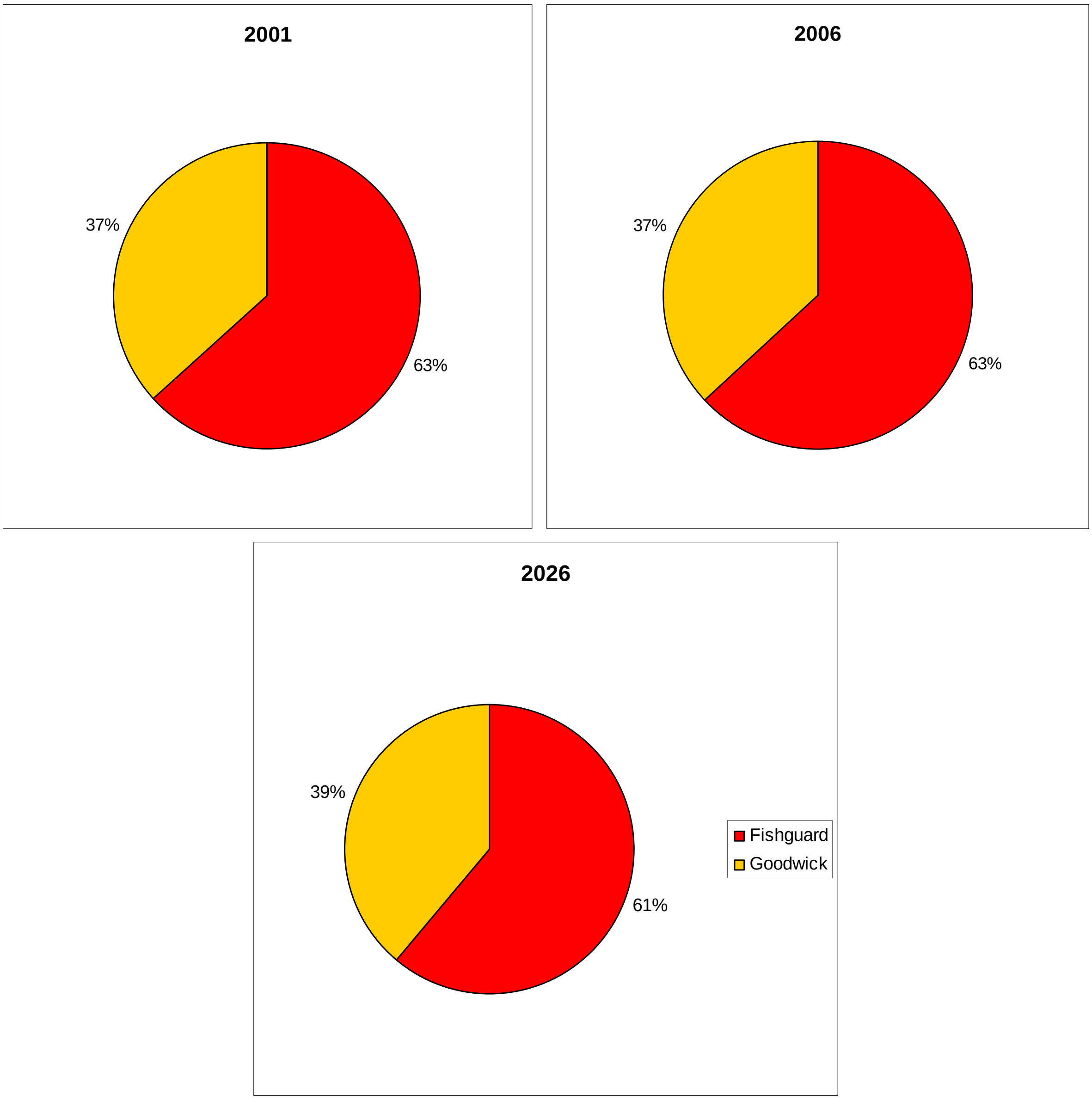
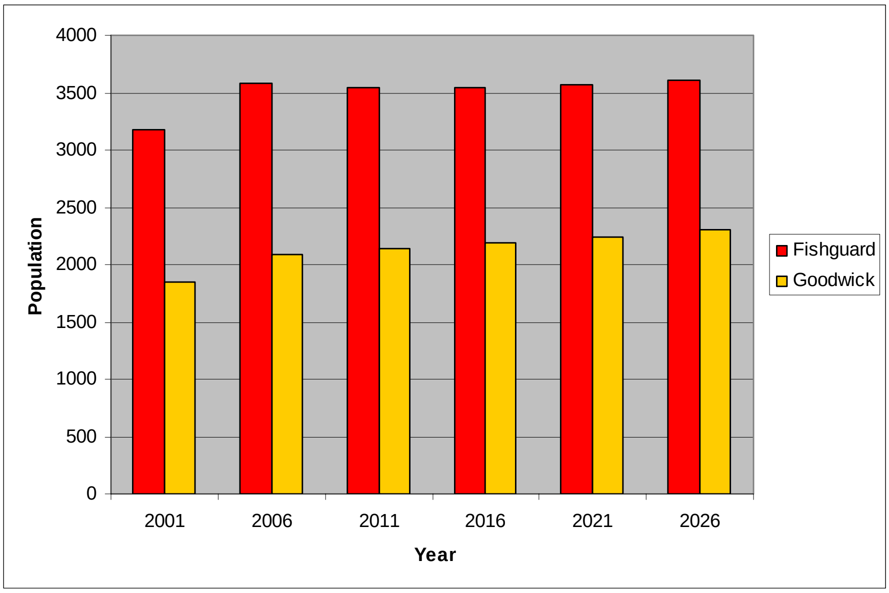


Fig 17 Proportion of Fishguard / Goodwick Population Living in Settlements - 2006 and 2026

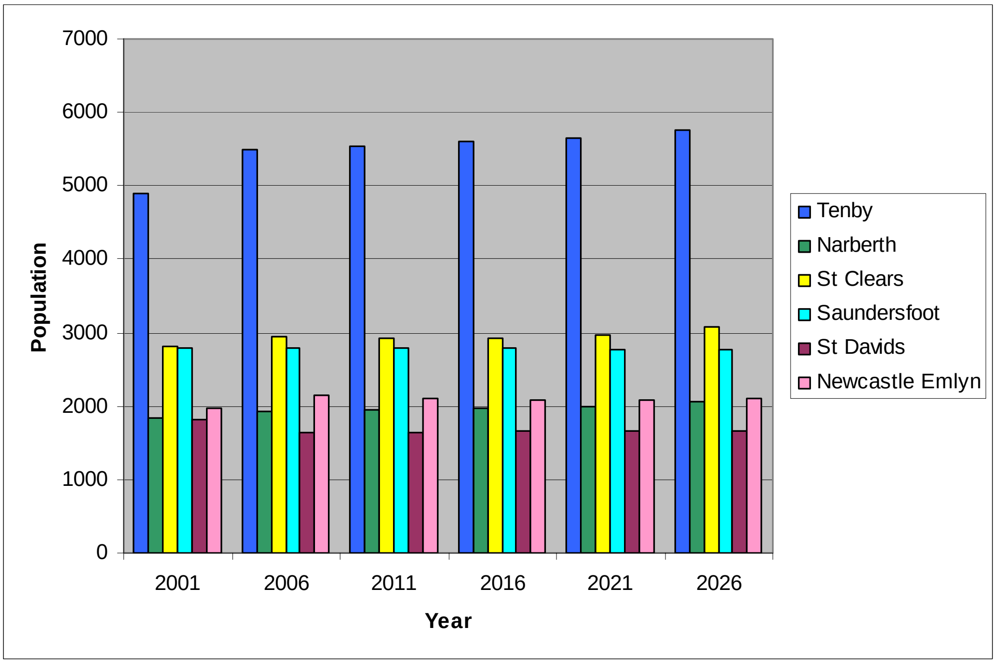


Source: Experian Retail Planner 2006 – Lower Super Output Area Projections

Fig 18 Population in Settlements of the Fishguard / Goodwick Hub - 2006 to 2026

The Population of Other Settlements in Pembrokeshire – The Haven

3.51 Areas for some further tier 2 and 3 settlements were able to be identified using Lower Super Output Areas. The following analysis therefore gives some indication of anticipated changes in the remaining settlements in Pembrokeshire – The Haven Spatial Plan Area.



Source: Experian Retail Planner 2006 – Lower Super Output Area Projections

Fig 19 Population Projections for Other tier 2 and 3 Settlements in Pembrokeshire - The Haven

3.52 Of the settlements identified here, Tenby and St Davids are the two largest settlements outside the hub areas.

a Tenby experienced the largest absolute population growth of nearly 600 between 2001 and 2006, a relative increase of 12.1%. It is also projected to experience the largest increase in population of 260 (4.7%) between 2006 and 2026.

b Narberth is anticipated to experience the largest relative growth of 7.0% from 1,930 to 2,070 between 2006 and 2026.

c The population of St Clears is projected to decrease slightly between 2006 and 2016 although will increase by a total of 130 people between 2006 and 2026 overall.

d Whilst St Davids experienced a significant decline of 9.7% (175 people) between 2001 and 2006, it is anticipated to grow slowly after 2011. However, the overall population increase between 2006 and 2026 is minimal at 1.5% (25 people).

e Despite increasing its population by 9.2% between 2001 and 2006, Newcastle Emlyn is expected to experience a decline of 1.4% of its population between 2006 and 2026.

f The population of Saundersfoot is expected to continue to decline with a loss of 1% of its population by 2026.

Summary

3.53 This analysis provides the basis for building an understanding of current and future complementarity of settlements within the Pembrokeshire – The Haven Spatial Plan Area. An understanding of where people live is needed as a basis for the requirements for service and facilities provision and a baseline against which we can understand the quality of provision.

3.54 This analysis highlights the significance of the Haven Towns Hub as the key population centre in the Spatial Plan Area. Whilst the settlements of Haverfordwest and Milford Haven accommodate the majority of the population, Pembroke Dock and Pembroke are also significant population centres within the Spatial Plan Area. However, Carmarthen is the largest individual settlement and the primary settlement in the eastern part of the Spatial Plan Area and its significance to the Spatial Plan Area must be recognised.

3.55 The coastal area of Saundersfoot and Tenby appear to be of greater significance in population terms than the Fishguard Hub albeit that their proximity to the Haven Towns hub means their sphere of influence is likely to be more limited. However, this is important in highlighting both the importance of this coastal (tourism) hub area and the relatively lesser significance of the Fishguard Hub. This raises particular questions about its long term role and its ability to serve the wider area.

3.56 The map in Appendix 1 illustrates the anticipated changes in the population living in key settlements across Pembrokeshire - The Haven between 2006 and 2026. Population projections forecast growth across most of the Spatial Plan Area to 2026. However, it is only settlements in the Haven Towns hub that are expected to increase their share of the Spatial Plan Area's population with Haverfordwest seeing the biggest growth followed by Milford Haven and Pembroke Dock. Outside of the Haven Towns hub all other settlements will either retain or decrease their percentage of the Spatial Plan Area's population.

3.57 These issues will have significant implications for the study. As the Haven Towns Hub increases its relative dominance; Carmarthen continues to act as the largest population centre; the Fishguard Hub continues to have a limited population level; and other centres exercise a greater or lesser significance in terms of their population levels, questions will emerge regarding the most appropriate distribution of facilities and services across the Spatial Plan Area in order to ensure that the most appropriate, equitable and sustainable distribution can be achieved.

4.0 # Housing

4.1 Having considered the current and anticipated future distribution of population across the Spatial Plan Area, it is also useful to assess the distribution of housing and the relative strength of the housing markets within different parts of Pembrokeshire – The Haven. The purpose of this is to achieve a more detailed understanding of the roles of the different settlements and their ability to meet the housing needs of the local communities. This chapter therefore reviews the number of housing transactions and the average prices for different types of property over time and across the Spatial Plan Area and the level of residential allocations and completions across the Spatial Plan Area.

4.2 This analysis of average house sale prices and number of transactions is based on an analysis of the following postcode sectors which have been taken as a reliable proxy for different key settlements.

Hub	Postcodes	Number of Households
Carmarthen	SA31	**7,636**
Fishguard	SA64	1,044
	SA65	1,982
		3,026
Haven towns Hub	SA61 (Haverfordwest)	6,192
	SA71 (Pembroke)	4,356
	SA72 (Pembroke Dock)	4,282
	SA73 (Milford Haven)	8,575
		23,405

Source: Experian Retail Planner 2007

Table 4 Postcode sectors used for hub analysis with number of households

4.3 This postcode based analysis gives a broad indication of the position within the different hubs and in particular settlements although it is difficult to draw precise conclusions about the strength of the housing market within individual settlements from this data. The geographical definition of the hub differs from that comprising of LSOAs used for the population analysis and the resultant figures may therefore not reflect trends over the hub as a whole.

The Housing Market

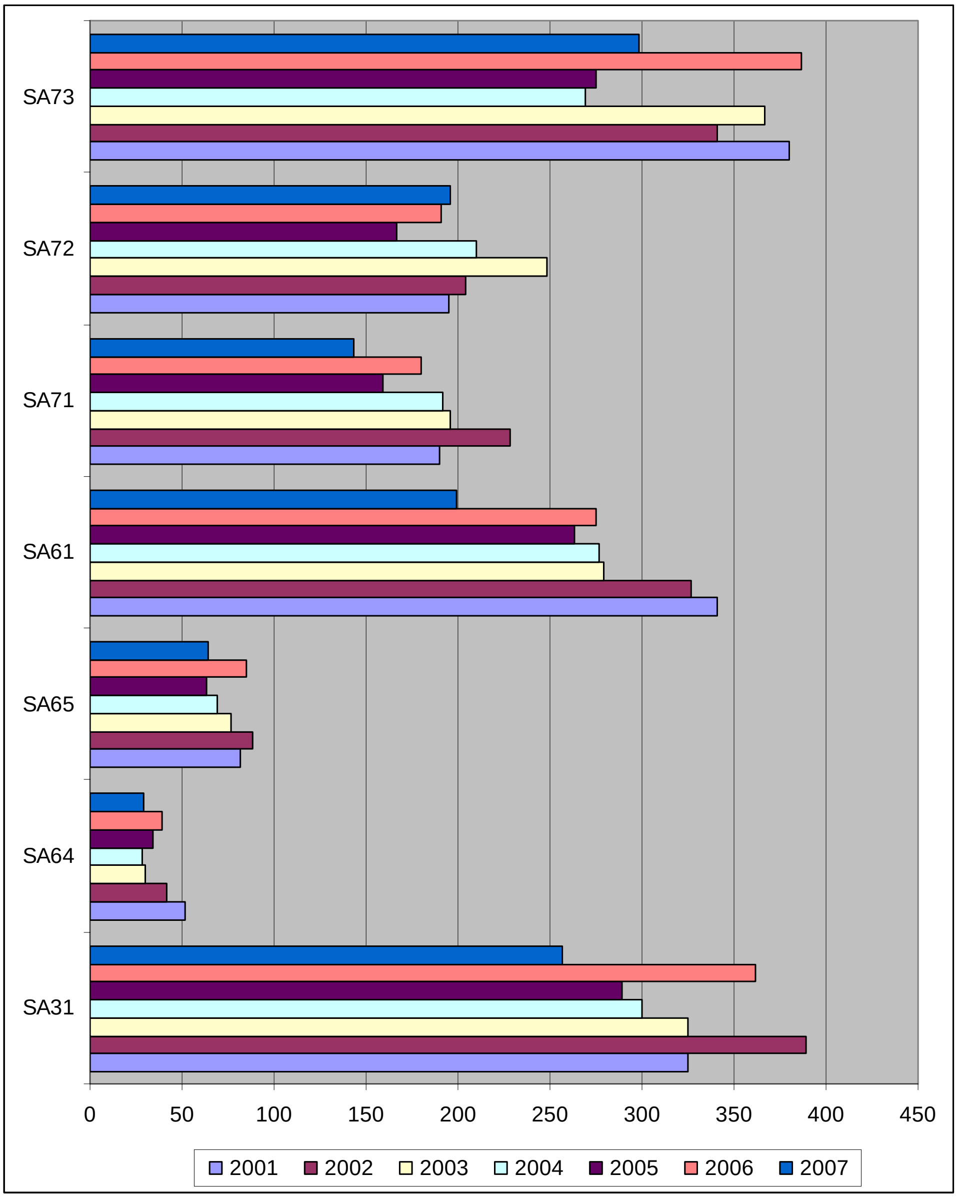
Number of House Sale Transactions

4.4 An understanding of the relative popularity of different areas and the strength of the housing market can be obtained by undertaking a review of the number of house sale transactions and the average transaction price. Data relating to these topics was obtained from www.proviser.com and www.rightmove.co.uk for the 7 postcode sectors detailed above.

4.5 As shown below, this analysis shows how the number of house transactions in the SA64 and SA65 postcode areas (Fishguard and Goodwick) has been consistently and substantially lower than those in the other hub areas. The number of transactions in Pembroke and Pembroke Dock has fluctuated between 150 and 200 per annum – less than in the larger centres in the Haven Towns Hub and for Carmarthen – whilst the number of transactions in the larger areas of Milford Haven, Haverfordwest and Carmarthen has fluctuated between 250 and 350 per annum. Whilst these differences do (unsurprisingly) show a greater level of activity within the larger population centres, this is a function of their scale and the number of dwellings that are available to buy and sell and is not solely a function of the relative strength of the housing market.

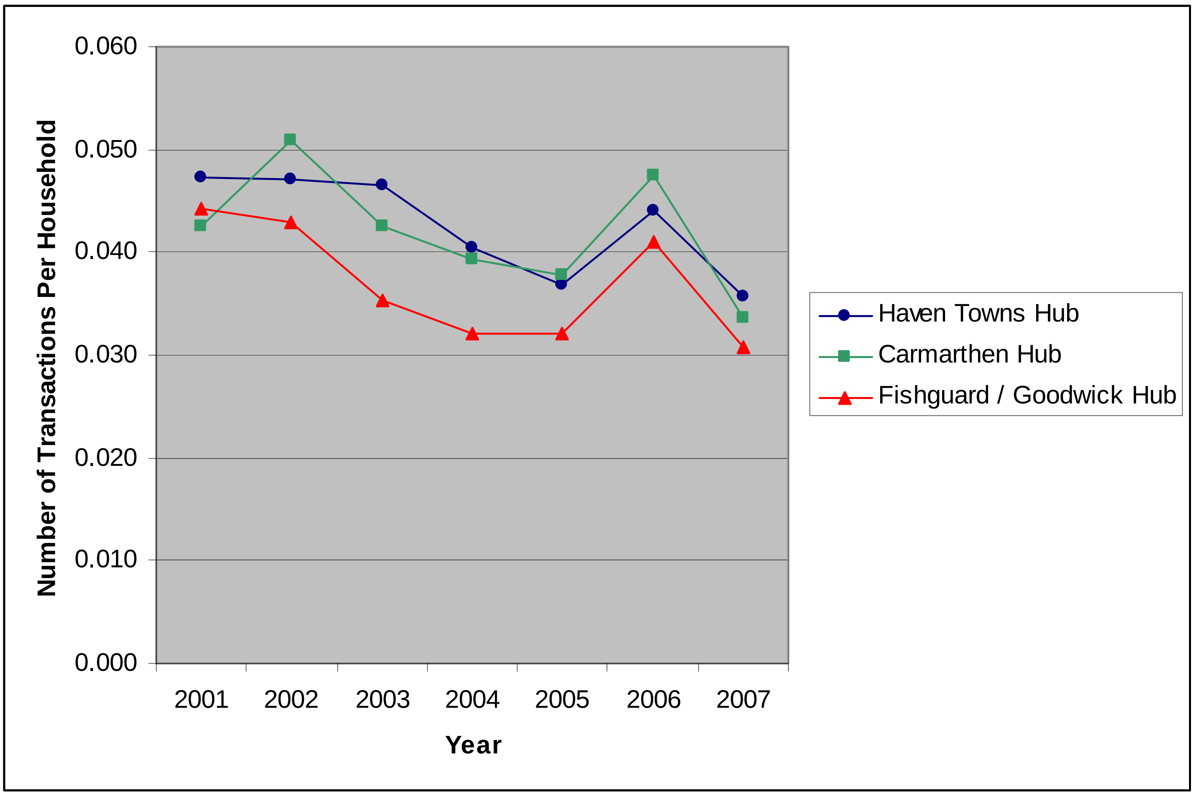
4.6 Similarly, given its substantial size, it is not surprising that the number of transactions in the Haven Towns Hub has been consistently larger than for the other hubs. In order to consider the number of transactions on a more level basis, we have appraised the number of transactions in each hub in relation to the number of households in 2007. Whilst it would have been preferable to undertake this analysis in relation to the number of dwellings in each hub, the most reliable data on the number of dwellings at this settlement level is taken from the 2001 Census and is unavailable on a postcode basis and could therefore not be applied to provide an accurate index of transactions.

4.7 Figure 21 shows that there has been a consistent pattern in the number of housing transactions per household within each of the hubs between 2001 and 2007. The relative number of transactions in the Carmarthen and Haven Towns hubs is shown to have remained broadly similar over this period and has been consistently higher than the number of transactions in the Fishguard hub. This would point towards a stronger housing market in the Carmarthen and Haven Town areas compared to Fishguard which would tend to attract fewer incoming people and has had a lower demand for housing over this time. This view of a lower level of demand for housing in the Fishguard Hub is reflected in the evidence of housing completions that is set out in this chapter, although it is important to recognise the extent to which the number of transactions will be informed by the supply of housing. A lower number of dwellings and a lower level of house building in the FIshguard Hub, compared to a higher number of dwellings and a more active house building sector in the Haven Towns and Carmarthen Hubs might therefore explain these differences. However, this in itself is very useful in explaining the relative importance of the different hubs and settlements as current and anticipated future population centres and the resultant strength of the housing market in each location.



Source: www.proviser.com

Fig 20 Number of annual housing transactions in each postcode area, 2001-2007



Source: www.proviser.com and Experian Retail Planner 2007

Fig 21 Number of House Sales per Household in the Three Hubs

	2007	2007 Transactions per Household	2008	2008 Transactions per Household	% Decrease Transactions per Household
Haven Towns Hub	964	0.041	486	0.021	49.6%
Carmarthen Hub	288	0.038	125	0.016	56.6%
Fishguard/ Goodwick Hub	109	0.036	70	0.023	35.8%

Source: www.rightmove.co.uk and Experian Retail Planner 2007

Table 5 Number of Property Transactions per Household by Hub in 2007 and 2008

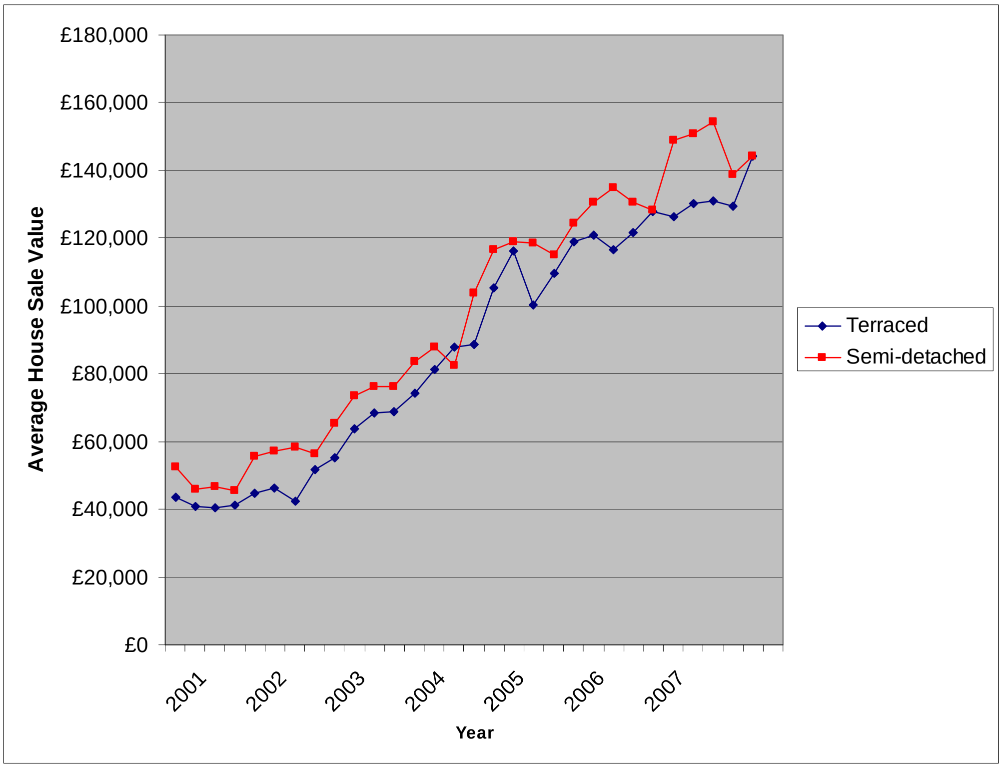
4.8 A comparison between the number of property transactions in 2007 and 2008 illustrates a fall in property market activity over the last year. It would appear that Carmarthen has been most greatly affected by a proportionate fall in property transactions, closely followed by the Haven Towns Hub, with the Fishguard Hub having been the least affected. In view of the scale of the Haven Towns Hub and the number of housing transactions that have taken place in the 5 Primary Key Settlements, it is unsurprising that it has suffered from a substantially greater reduction in housing transactions in actual terms.

Although the FIshguard Hub has been affected by the housing market downturn, the level of change has been relatively less, again reflecting that the housing market in Fishguard has always been more limited than in the other parts of the Spatial Plan Area and it has served more of a local role than the other hubs. These characteristics appear to have insulated it from the most dramatic levels of change that have occurred over the past year.

Average House Sales Prices

4.9 An analysis of the average house sale prices for two types of houses – terraced and semi-detached – provides a further basis by which the relative strength of the housing market in the three hub areas can be further understood. This is useful in highlighting the relative demand for housing in each area and the extent to which they reflect a complementarity in the roles of each hub and settlement. A consideration of particular housing types provides a more robust basis for analysis than an assessment of average prices which would have been influenced by the amount of different types of housing within each settlement rather than just by the strength of the housing market.

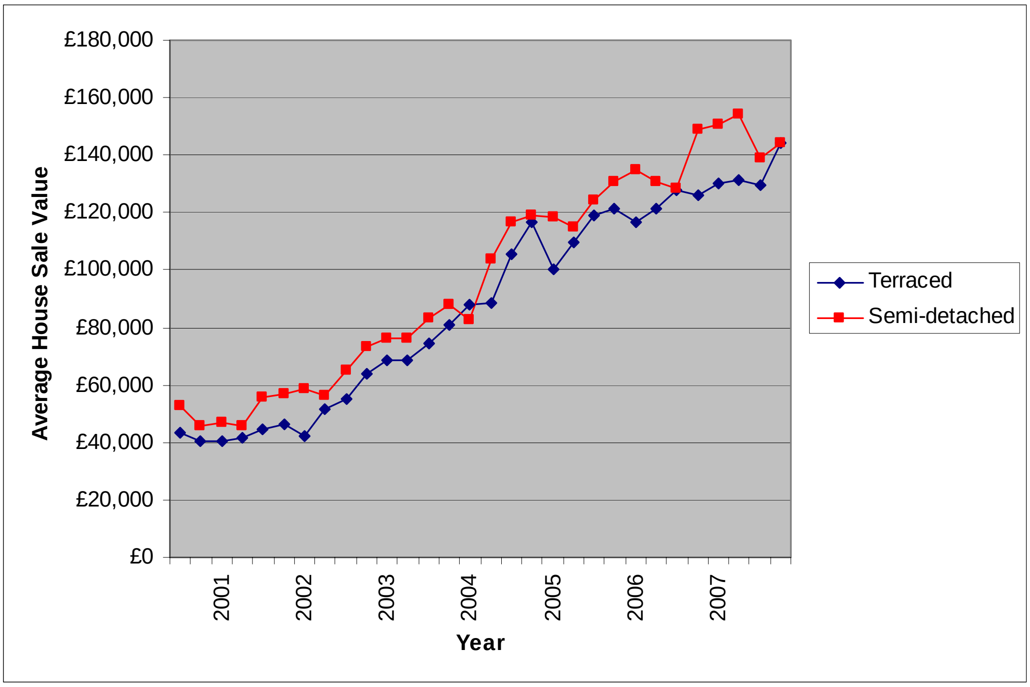
4.10 Maps in Appendix 2 show that the highest average sale prices for both semi-detached and terraced accommodation are in the coastal hub of Tenby and Saundersfoot and the area around Newport. High semi-detached house sale prices are also found in the area surrounding and to the north of Haverfordwest including St Davids and smaller rural settlements and an area of rural settlements south of Cardigan. For both semi-detached and terraced housing, average house sale prices in the tier 1 settlements are moderate compared to the Spatial Plan Area as a whole.



Source: www.proviser.com

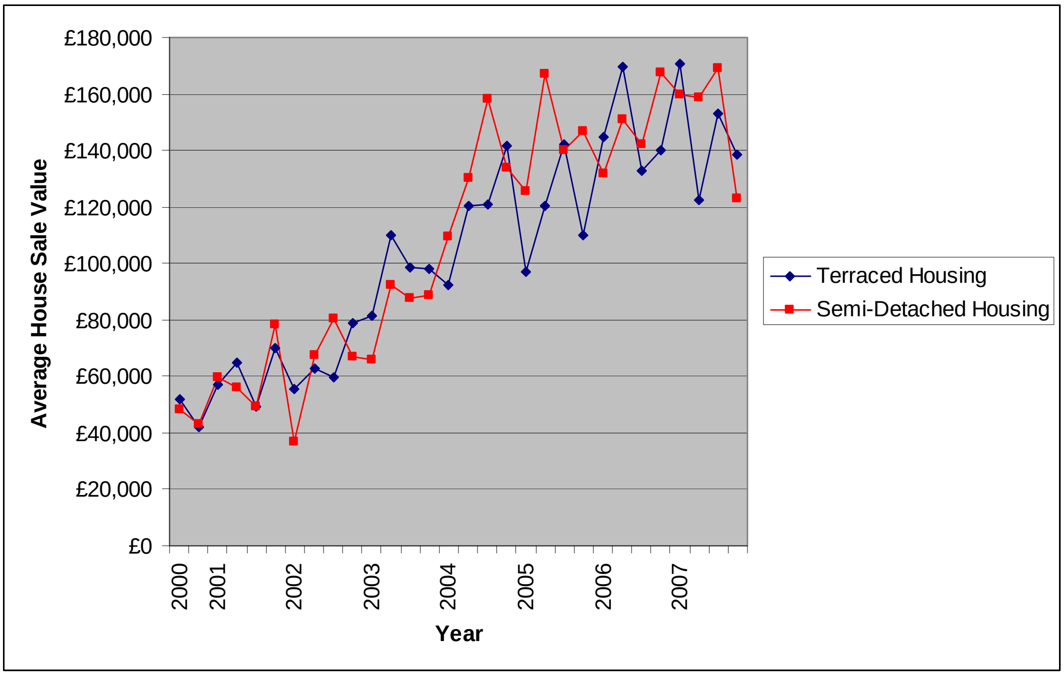
1. House Price data weighted by 2007 estimated number of households by Experian retail planner 2007 data to generate average house price for postcodes SA61, SA71, SA72, SA73

Fig 22 Haven Towns Hub House Prices



Source: www.proviser.com

Fig 23 Carmarthen Hub House Prices



Source: www.proviser.com

1. House Price data weighted by 2006 estimated number of households by Experian retail planner 2006 data to generate average house price for postcodes SA64 and SA65

2. Where data missing for a financial quarter average house is projected using the average of the previous and subsequent financial quarter

Fig 24 FIshguard/ Goodwick Hub House Prices

	Haven Towns Hub		Carmarthen Hub		Fishguard / Goodwick Hub	
	Actual Increase in House Price	% Increase in House Price	Actual Increase in House Price	% Increase in House Price	Actual Increase in House Price	% Increase in House Price
Terraced	£86,108	197.9%	£96,280	234.0%	£100,993	194.3%
Semi-Detached	£86,434	164.6%	£109,318	207.4%	£120,758	251.0%

Source: www.proviser.com

Table 6 Increase in House Prices between 3rd Quarter of 2000 and 3rd Quarter of 2007

4.11 Whilst all three hubs share a similar starting point for house prices of between £40,000 and £50,000 for terraced and semi-detached houses in 2000, prices have subsequently diverged. In the 3rd Quarter of 2007, the Fishguard Hub had the highest sales prices for semi-detached accommodation and the table above shows that it had enjoyed the greatest absolute and relative increase in semi-detached house prices since 2000. The Carmarthen Hub had the second highest semi-detached prices in the 3rd quarter of 2007 – these prices have increased by over 200% since 2000. The Haven Towns Hub has shown less of an increase in semi-detached prices and had the lowest prices in the 3rd quarter of 2007.

4.12 Terraced accommodation shows a similar pattern, although there is a greater difference in average house sale prices between the Fishguard and Carmarthen Hubs. However, the Carmarthen Hub has experienced a greater relative increase in terraced house prices than the other two areas.

4.13 The average house sale price per financial quarter is affected by the location and quality of housing sold in each hub and, even when classified by 'type' in terms of terraced or semi-detached, may not be directly comparable over time or between locations. Particularly in Fishguard the low number of transactions may make the statistics less reliable and certainly accounts for a greater fluctuation in prices compared to the other two hubs.

4.14 The national trend between 2007 and 2008 has been one of falling house prices. Whilst this trend has been reflected in the Carmarthen Hub where the average price of terraced houses fell by 7.5% and semi-detached houses fell by 5.4%, it is not entirely reflected in the Haven Towns or the Fishguard Hubs. In the Haven Towns Hub, the average price of semi-detached properties rose by 2.1% over this period whilst the average price of terraced properties in the Fishguard Hub also rose by 2.75%.

4.15 Substantial differences in house sale values are also apparent within the hubs. The following postal districts are assumed to represent the main settlements within the hubs.

- SA31 – Carmarthen
- SA61 – Haverfordwest
- SA71 – Pembroke
- SA72 – Pembroke Dock
- SA73 – Milford Haven / Neyland
- SA64 – Goodwick
- SA65 – Fishguard

4.16 The map of average terraced house sale prices (Appendix 2) shows that, although house prices are broadly comparable, terraced house values are lower around Goodwick than Fishguard. In terms of semi-detached homes, house price sales in the Haverfordwest, Pembroke and Pembroke Dock area are higher than those in Milford Haven/Neyland. However, for terraced housing, house sale prices are higher in Pembroke than Pembroke Dock, Milford Haven/Neyland and Haverfordwest.

4.17

	2007		2008	
	Terraced	Semi-detached	Terraced	Semi-detached
Haven Towns Hub	£133,578	£144,978	£127,055	£148,077
Carmarthen	£123,692	£165,632	£114,407	£156,685
Fishguard / Goodwick	£143,464	£153,811	£147,128	£131,857

Source: www.rightmove.co.uk

Table 7 Average House Sale Values in 2007 and 2008

4.18 These trends suggest that the housing market within the Spatial Plan Area has been relatively robust over the period from 2001 and that in some areas it continued to show signs of relative strength. Whilst the Fishguard Hub is the smallest in population terms and consequently its housing market has been the least active, it is nevertheless apparent that there is a (limited) on-going demand for housing in this area, highlighting a demand to live in Fishguard and a need to ensure that it is able to adequately provide the necessary services and facilities to serve its resident population and that of the surrounding area.

4.19 The higher level of demand for housing in the Carmarthen and Haverfordwest hubs is less surprising and reflects their overall scale and importance as population and service centres. In the light of this identified importance, it will be important to ensure that the hubs and individual settlements within them are able to serve complementary roles in terms of their ability to meet the needs of the local population. In addition to providing adequate facilities and services, this will also necessitate an appropriate provision of housing to meet current and anticipated future requirements.

4.20 Whilst house prices may have recently decreased, the Community Plan for Pembrokeshire 2003/8 still identifies that rises in house prices have outstripped relative earnings. Demand from people wishing to retire to the area and second home ownership are identified as key drivers of this alongside more national trends such as an ageing population and household disintegration. The implications of this upon the affordability of local housing and the ability of residents to enter the housing market should be recognised and appropriate responses should be identified, for example, in respect of the delivery of affordable housing.

Housing – Where Do People Live and Where Will They Live?

4.21 Both the Carmarthenshire UDP and the Pembrokeshire Joint UDP allocate housing sites to provide residential development from 2001 to 2016. The map in Appendix 2 shows the location of settlements within which land has been allocated for 20 or more houses.

Hub	Centre	Number of Residential Units Allocated
Haven Towns Hub	Haverfordwest	1859
	Milford Haven	1039
	Pembroke Dock	496
	Pembroke	363
	Neyland	181
	Johnston	240
	Remainder of Hub	12
	TOTAL	*4190*
Carmarthen Hub	Carmarthen	648
	Remainder of Carmarthenshire area of WSP area	1015
	TOTAL	*1663*
Fishguard / Goodwick Hub	Fishguard	273
	Goodwick	13
	TOTAL	*286*
Other Settlements	Tenby	120
	Narberth	335
	St Clears	278
	Saundersfoot	35
	St Davids	112
	Newcastle Emlyn	73

Source: Pembrokeshire JUDP and Carmarthenshire UDP

Table 8 Summary of Housing Allocations by Hub

4.22 Over half of the total number of allocated housing units are located within the Haven Towns Hub and almost half of the allocations within this hub are located in Haverfordwest. Whilst the largest number of housing allocations are in Haverfordwest, Milford Haven and Carmarthen, it is noteworthy that three times as many houses have been allocated in Haverfordwest as in Carmarthen. The large difference in the amount of allocated housing in Haverfordwest and Milford Haven and in Carmarthen do reflect the differences in anticipated population growth over the period to 2026, although it will be important to ensure that sufficient housing provision is achieved and maintained in Carmarthen to meet the needs of the local population and to reflect its status as the largest individual settlement within the Spatial Plan Area.

4.23 Housing allocations of over 250 units are also made for the settlements of Pembroke Dock and Pembroke within the Haven Towns hub and Fishguard, Narberth and St Clears outside the hub. However, reflecting its limited size and its relatively limited forecast level of future population growth, the level of housing allocations that have been made for the Fishguard Hub is low. This further underlines the questions that have been raised in respect of the long term role of the Fishguard Hub and its ability to serve the needs of the local population and surrounding communities.

4.24 Outside of the main towns and hubs, a distribution of housing allocations in smaller settlements throughout the Spatial Plan Area provides an important basis for the development of adequate levels of new housing in a manner that meets local needs and will help to support existing communities. This distribution of the concentration of housing allocations within the main settlements but with additional allocations in smaller centres provides an important basis by which each settlement might be able to achieve its full potential and complementary relationships between them might be developed.

Are Allocations Being Delivered?

4.25 In this section, we analyse the distribution of past housing completions and recent extant residential planning permission and live applications in order to assess whether the allocations contained within the Pembrokeshire JUDP and Carmarthenshire UDP are being delivered. Whilst annual house completions are over the period 1999 to 2008 and the housing allocations are for 2006 to 2016, a comparison does provide some indication of whether past house building activity has been in the right location to fulfil future housing requirements.

	Number of Residential Units Allocated	Annual Number of Residential Units Allocated	Total unit completions Mid 1999 to Apr 2008	Annual Completions 1999 to 2008
Haven Towns Hub				
Haverfordwest	1859	186	478	53
Milford Haven	1039	104	532	59
Pembroke Dock	496	50	444	49
Pembroke	363	36	357	40
Neyland	181	18	227	25
Johnston	240	24	71	8
Remainder of Hub	*12*	1	259	29
TOTAL	**4190**	419	**2368**	**263**
Carmarthen Hub				
Carmarthen	*648*	65	390	43
Remainder of Carmarthenshire area of WSP area	1015	102	437	49
TOTAL	**1663**	**166**	**827**	**92**
Fishguard / Goodwick Hub				
Fishguard and Goodwick	286	29	289	32
TOTAL	286	29	289	32
Other Settlements				
Tenby	120	12	0	0
Narberth	335	34	93	10
St Clears	278	28	112	12
Saundersfoot	35	4	0	0
St Davids	112	11	66	7
Newcastle Emlyn	73	7	41	5

Source: Carmarthenshire UDP and Pembrokeshire JUDP and Council housing completion data

1. Figures for 2008 housing completions for Carmarthenshire included in the total completions are draft only

Table 9 Housing Allocations and Completions for Main Settlements

4.26 Of the three hub areas only in Fishguard hub do annual completions exceed the estimated future dwelling requirement (as established by the level of housing allocations). In Haverfordwest, the past rate of annual completions falls substantially short of meeting only 30% on an annual basis of the housing allocated in the development plan. Indeed, Milford Haven has a higher rate of completions although the level of development required is lower.

4.27 In the other settlements housing completions fall short of current housing allocations. It is particularly striking that there are no housing completions within the settlements of Tenby and Saundersfoot, perhaps due to their location within the National Park.

4.28 The following table shows housing completions in those areas which fall outside the hub and settlements boundaries used for population projections. Housing completions have been grouped by the nearest main settlement.

	Total unit completions Mid 1999 to Apr 2008	Annual Completions 1999 to 2008
Near Haverfordwest	215	24
Near Pembroke / Pembroke	102	11
Near Fishguard/ Goodwick	145	16
Near Tenby	339	38
Near Narberth	19	2
Near Whitland	167	19
Near St Clears	164	18
Near Carmarthen	70	8
Near Newcastle Emlyn	28	3
Near Cardigan	198	22

Source: Council housing completion data

1. Figures for 2008 housing completions for Carmarthenshire included in the total completions are draft only

Table 10 Housing Allocations and Completions for Other Areas

4.29 The table above shows that although there have been no housing completions in Tenby or Saundersfoot, the area around Tenby has the highest number of completions of any area outside the settlement / hub boundaries. This indicates that the coastal area will continue to play an important residential role, although accommodation may be located outside the main centres and a significant proportion of these houses are likely to be second homes – two factors that might reduce the significance of this area as a residential location.

Rural settlements near to Whitland, Haverfordwest and Cardigan have also seen significant levels of recent housing completions.

4.30 The Schedule in Appendix 2 cross references allocated housing sites in Pembrokeshire and Carmarthenshire with housing completions on the site from the last Joint Housing Land Availability Study (April 2005 to April 2007) and major residential planning applications received since the beginning of 2004. This is based upon information that has been provided by the County Councils and it is possible that data on some housing allocations may have been missed where the application or completion site name did not correspond to the housing allocation site name.

4.31 Across the Spatial Plan Area, progress has been made on 32% of sites within these parameters: 21% of sites with housing completions since mid-2005 and a further 11% with planning permission or a planning application that is currently being determined.

4.32 Most of the progress made on housing delivery in Pembrokeshire is within the Haven Towns hub. This reflects both the high proportion of housing allocations and the level of demand for development in this important Hub. Progress can be summarised as follows:

a **Haverfordwest** - Progress on 2 out of 10 allocations, with an application refused on the largest site and no progress on the second largest allocation.

b **Milford Haven/ Neyland** - Progress has been made in Milford Haven on 5 out of 11 allocations, including significant completions on 2 out of the 3 largest sites. However, no progress has been made on the largest allocation at Thornton Road. A large number of housing completions have been made on the Honeyborough Farm site in Neyland, although no progress has been made on the other 2 allocations.

c **Pembroke Dock/ Pembroke** - Progress has only been made on 4 out of 13 allocations in Pembroke Dock, of these only the Pennar Park site has a large dwelling allocation. No housing completions or planning applications have been made with respect to the Pembroke housing allocation.

d **Johnston** – Good progress has been made with significant completions on one site, planning permission for the full allocation on one allocation and only one allocation showing no progress.

4.33 In the **Carmarthen** hub progress has been made on 8 out of 20 sites; 5 sites have housing completions and 5 planning permission or undetermined applications

4.34 In the **Fishguard** hub a small number of housing completions have been made on all three allocation sites. However, the two largest allocations have seen no progress.

4.35 With respect to other key settlements:

- a No progress has been made in delivering allocations in the tier 2 settlements of Tenby and Narberth;
- b Significant progress has been made in St Clears where there have been housing completions on 4 out of 11 allocations with a further 2 sites with planning permission or an application being considered;
- c In Whitland all 5 allocations have seen some progress: 3 with housing completions and 2 with outline permission;
- d Progress is being made on the single allocation in Laugharne which has planning permission and the 2 allocations in Pendine – Llanmiloe;
- e In Letterston there are housing completions on 1 site and planning permission on the second out of 3 allocation sites;
- f Limited progress has been made in Newcastle Emlyn, whilst no housing completions have been made on 3 allocations, 1 site has planning permission; and,
- g No progress has been made on single allocations in the tier 3 settlements of Saundersfoot, St David's and the 3 allocations in Kilgetty.

4.36 This analysis is intended to provide an overview of the current situation with respect to housing delivery. However, it is recognised that 2-3 years is not a long period over which to assess progress on 2006 UDP housing allocations, particularly given that the delivery of larger residential sites can take considerable time and progress on many schemes might have faltered as a result of the current economic climate and housing market. In the light of this, limited progress on allocated sites in the initial years of the Plan Period should not necessarily be viewed as being indicative of an inability to deliver the sites over the longer term period.

Implications for Complementarity

4.37 It is important that complementary housing roles are fulfilled by ensuring local demand for housing can be satisfied within each area and settlement. This would provide a basis for the enhancement of levels of sustainability within individual settlements and communities and in supporting the viability of local services and facilities. Although the delivery of new housing represents a particular challenge at the current time, it is important to understand the risks associated with non-delivery and, consequently, to identify and implement measures to support new housing development in appropriate locations.

4.38 A shortage of housing would force people to compete in the housing markets of these settlements, potentially, to live elsewhere, placing greater pressure on other settlements. This also has implications for economic and service provision, as population change impacts on the respective roles of settlements. Consequently, a failure to provide sufficient housing would serve to undermine the vision for the area in terms of the achievement of stronger and more sustainable communities and would thereby undermine the ability of settlements and hubs to perform adequately complementary roles.

5.0 Employment

5.1 The vision for the Pembrokeshire-The Haven Spatial Plan Area recognises the importance of the local economy as a central component of its future well-being. It seeks to establish a diverse high value-added economy which is underpinned by the area's high quality environment, maritime access and its energy and tourism opportunities. Within this vision lies the recognition of a number of potential opportunities for economic growth, all of which build upon particular existing local strengths.

5.2 This chapter provides an overview of the roles of and relationships between the key settlements and hubs in respect of employment provision by considering:

a The nature of the main economic activities that are undertaken;

b The distribution of employment facilities; and,

c The patterns of commuting within the hubs.

5.3 This analysis provides a detailed understanding of the relative roles of the key settlements in serving the local economy and considers the potential implications of employment land allocations. It also highlights the implications of possible growth sectors and the extent to which they might relate to the existing roles and functions of the main settlements. It is rooted in a recognition of the way in which the role of any particular settlement is defined by its economic function and also the importance of providing adequate job opportunities in order to enhance the vitality of the local economy and help to retain the existing local population.

Data Issues

5.4 An important element of this chapter is a review of the relative distribution of jobs across the Spatial Plan Area and the relative importance of different economic sectors. This analysis is based upon a review of Annual Business Inquiry (ABI) Workplace Data. Through an analysis of ABI data for Lower Super Output Areas (LSOA), we have been able to establish an understanding of employment levels within different settlements. This has been based upon information provided by the Welsh Assembly Government regarding the make-up of settlements by LSOA.

5.5 The ABI data provides a broad indication of the number of people working in different economic sectors. The estimates cover all UK businesses registered for VAT or PAYE. It is recognised that, as such, it is subject to sampling errors although the system has been designed to minimise any such errors. It is also recognised that this data is more accurate at a larger scale, although it does provide the most up-to-date indication of the distribution of jobs and economic sectors at the scale that is required by this study.

5.6 Given the considerable change that has occurred in the Spatial Plan Area since the 2001 Census, it is not considered that the Census data would provide a sufficiently up-to-date indication of current economic sectors. Moreover, our focus in this chapter is on the location and distribution of jobs as a means by which to assess the relative concentration of particular economic activities within different settlements. This is different to an assessment of the economic sectors that the resident workforce is involved in which would provide data on all workers that live in the area, regardless of their place of employment. The Census shows the usual resident population aged 16 to 74 in employment by the industry they work in and is therefore not able to provide the form of analysis that is required.

5.7 In light of this, we consider that the ABI data provides the most reliable and sensitive basis for analysis and that, although the actual figures provided are estimates, they do provide a broad indication of the relative importance and scale of different economic sectors. In any event, due to disclosure requirements, job numbers have been rounded to the nearest 100 and percentage figures have been rounded to the nearest 0.5%.

Total Employment

5.8 An overview of the overall distribution of jobs across the Spatial Plan Area represents an important starting point in understanding the relative economic role of key settlements and the extent to which they are complementary.

5.9 According to our analysis of Annual Business Inquiry Workplace Analysis Data for 2007, approximately 62,000 jobs exist in the Spatial Plan Area. These are divided between the 3 main hubs – which account for two thirds of total employment – and the other areas.

5.10 The Haven Towns Hub is the largest hub in the Spatial Plan Area and contains five Primary Key Settlements:

a Haverfordwest,

b Milford Haven,

c Neyland (Milford Haven and Neyland are defined by the Wales Spatial Plan as being linked settlements).

d Pembroke Dock; and,

e Pembroke (Pembroke Dock and Pembroke are defined by the Wales Spatial Plan as being linked settlements);

5.11 The implication of this physical size is that the Haven Towns Hub is the largest in employment terms, containing approximately 22,500 jobs which equates to over 35% of employment across the whole of the Spatial Plan Area. Employment provision within the Haven Towns Hub is divided between the five Primary Key Settlements which are located within close proximity to one another. Four of the Haven Towns (Milford Haven, Neyland, Pembroke Dock and

Pembroke) are located within 10km of one another, albeit that the settlements to the north of the Milford Haven waterway (Milford Haven and Neyland) are separated from those to the South (Pembroke Dock and Pembroke) by the Cleddau toll bridge. Haverfordwest is located a further 10km north of Milford Haven but enjoys good quality connections via the A4076. This proximity between the Haven Towns has been important in helping to establish its role as the main economic centre within the Spatial Plan Area, albeit that none of the towns are individually as large in employment terms as Carmarthen.

5.12 Whilst the total level of employment within the Carmarthen Hub (16,200) is substantially lower than that of the Haven Towns Hub, this is a function of the way in which the boundaries of the hub have been drawn tightly around the Carmarthen town alone. Employment within Carmarthen is higher than in any of the Haven Town settlements. This is a reflection of its importance as a major regional employment centre and its relative distance away from other key settlements (particularly when compared to the Haven Towns).

5.13 Despite forming a hub, Fishguard and Goodwick are defined by the Wales Spatial Plan as Key Settlements (rather than Primary Key Settlements). Although it is relatively isolated in relation to other major centres – being approximately 15 miles north of Haverfordwest as its nearest large centre – and is described by the Wales Spatial Plan as an important driver of the north Pembrokeshire economy, less than 2,000 jobs are available within the Fishguard Hub. This limited provision means that it effectively serves as a local centre and creates a considerable challenge in the achievement of a complementary role for the Fishguard Hub in terms of its ability to serve the employment needs of the local population and those living in the surrounding areas.

5.14 The distribution of employment provision in the Spatial Plan Area is illustrated below.

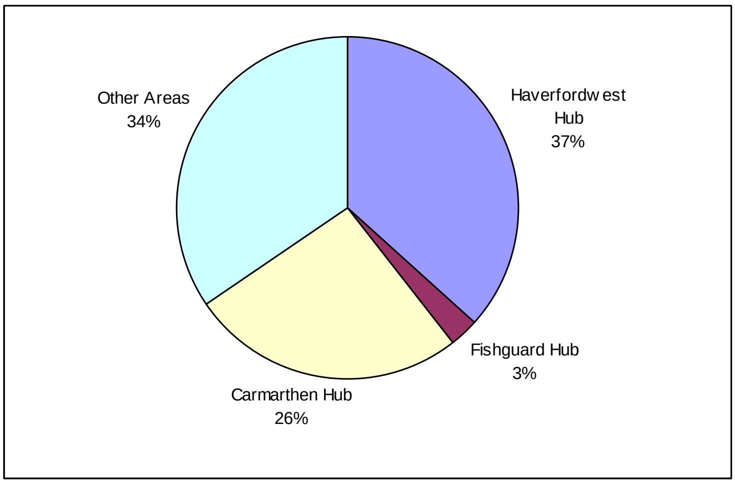


Fig 25 Distribution of Employment in Pembrokeshire Haven Spatial Plan Area

5.15 Although it is not possible to obtain reliable employment data for all settlements, the number of jobs in the main settlements in the Spatial Plan Area is summarised below:

Settlement	Wales Spatial Plan Status	No. Jobs	% of SPA total
Carmarthen	Primary Key Settlement	16,200	26.0
Haverfordwest	Primary Key Settlement	10,000	16.0
Pembroke Dock	Primary Key Settlement	4,600	7.5
Milford Haven	Primary Key Settlement	4,300	7.0
Tenby	Key Settlement	2,500	4.0
Pembroke	Primary Key Settlement	1,600	2.5
Newcastle Emlyn	Key Settlement	1,200	2.0
Fishguard	Key Settlement	1,100	2.0
Neyland	Primary Key Settlement	1,000	1.5
Narberth	Key Settlement	800	1.5
St Clears	Key Settlement	800	1.5
Saundersfoot	Key Settlement	700	1.0
Goodwick	Key Settlement	600	1.0
Johnston	None	600	1.0

Table 11 Distribution of employment in Pembrokeshire Haven Spatial Plan Area

5.16 This table shows the relative importance of different settlements in terms of their employment provision and is mapped in Appendix 3. The dominance of Carmarthen and Haverfordwest as the main employment centres is clearly evident as is the limited extent of employment provision in the Fishguard Hub. In addition, it is also interesting in showing the extent to which employment provision within a number of Primary Key Settlements (Pembroke and particularly Neyland) is lower than in some of the Key Settlements such as Tenby and Newcastle Emlyn. Although they are not defined as Primary Key Settlements, employment provision within the Hub Centres of Fishguard and Goodwick is shown to be lower than in a number of non-hub settlements. This raises fundamental questions about their ability to adequately serve the local population and the surrounding areas and to complement the economic role of other settlements within (and beyond) the hubs.

5.17 In considering the relative importance of particular economic sectors within different centres, it is important to recognise the very limited number of jobs that are available in certain settlements and, in particular, in the Fishguard Hub. The review of the nature of employment within each settlement and hub outlined below must be understood in the context of this overall distribution of employment provision.

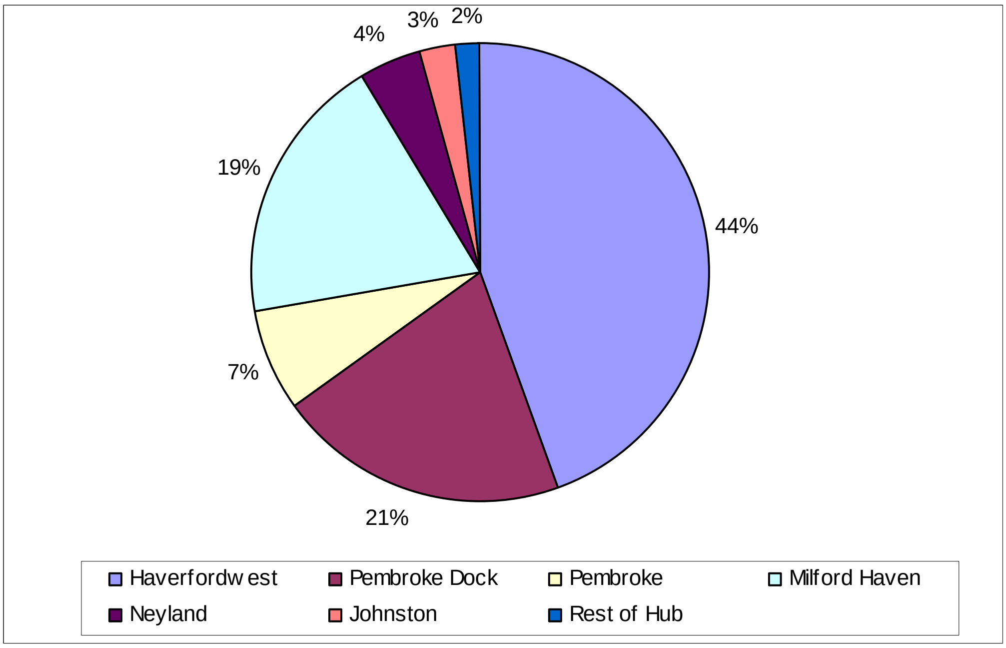
Employment Provision within individual Hubs

Haven Towns Hub

5.18 As has been shown, the Haven Towns hub represents the main employment centre within the Spatial Plan Area. Within the Hub, the County town of Haverfordwest is the largest number of jobs: according to the ABI Workplace Analysis Data, it provides 10,000 jobs – 45% of the total number within the hub and 16% of the total within the Spatial Plan Area as a whole. Given this very large scale of employment provision, it is evident that the future economic strength of both the Hub and the Spatial Plan Area will rely upon the continued well-being of Haverfordwest as a County Town, the largest employment centre in Pembrokeshire and the second largest employment centre in the Spatial Plan area (after Carmarthen).

5.19 Milford Haven and Pembroke Dock are broadly equitable in employment terms, both offering approximately 4,500 jobs whilst Pembroke and Neyland are much smaller employment centres, offering approximately 1,600 and 1,000 jobs respectively. These four settlements are concentrated in close proximity to one another around the Milford Haven Waterway. Together, they make up a very important concentration of employment activity and provide 11,600 jobs – more than are in Haverfordwest. As such, they perform an important complementary role by providing for a distribution of employment throughout the Haven Towns Hub. To this end, the location of Milford Haven and Neyland to the north of the Milford Haven waterway and Pembroke Dock and Pembroke to the south is particularly important in providing employment opportunities to those living in these different parts of Pembrokeshire.

5.20 As efforts are made to enhance the economic profile of this hub, it will be important to recognise the potential that is offered by all of the settlements and the opportunities that exist for increased levels of complementary activity. This will be largely shaped by an understanding of the different key sectors that exist within each settlement and the extent to which these are expected to grow in the future. However, changes to the economic role of different settlements will also be affected by specific policy choices and initiatives that will seek to steer growth in particular direction.



Total Number of jobs in Haven Towns Hub: 22,500

Fig 26 Distribution of Employment in Haven Towns Hub

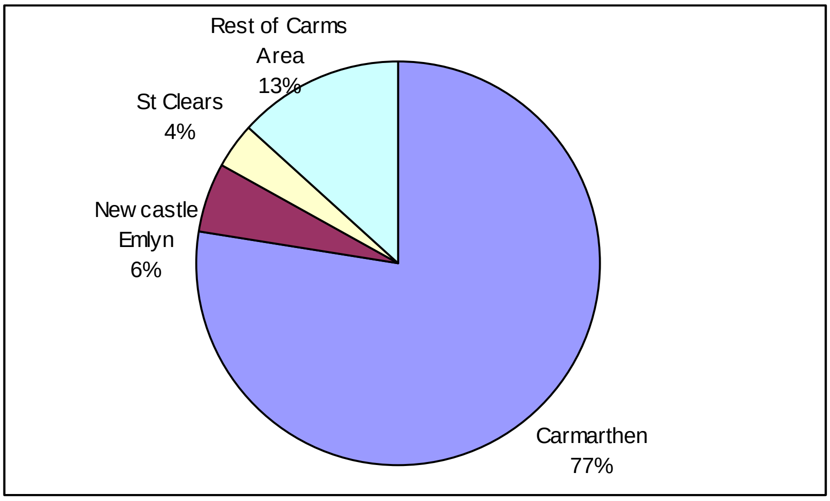
Carmarthenshire part of the Spatial Plan Area

5.21 As Carmarthen Hub is drawn tightly around the town, close to 100% of its employment is in the town. In the light of this and in order to understand the role of Carmarthen as an employment centre, it is helpful to consider the distribution of jobs across the Carmarthenshire part of the Spatial Plan Area. Our assessment of the distribution of jobs in the Carmarthenshire part of the Spatial Plan Area concentrates specifically upon Carmarthen, St Clears and Newcastle Emlyn as reliable data on employment levels in the other Key Settlements and Local Centres is unavailable.

5.22 The overwhelming majority of jobs within the Carmarthenshire part of the Spatial Plan Area are concentrated within Carmarthen. As has been shown, this is the largest centre within the Spatial Plan Area which provides 16,200 jobs – over 25% of the total within the Pembrokeshire Haven area. This very high employment provision reflects its County town status and its position to the east of the Spatial Plan Area, only 12 miles from the M4 motorway. This existing employment position provides an important platform from which future growth might be achieved, both within Carmarthen and elsewhere in the Spatial Plan Area as a spin-off from the recognised economic importance of the town.

5.23 The dominance of Carmarthen within the Carmarthenshire part of the Spatial Plan Area also reflects the character of the settlement hierarchy in this area, which is shown by the Wales Spatial Plan to include one Primary Key Settlement and five Local Centres – Newcastle Emlyn, St Clears, Whitland, Pendine and Laugharne.

5.24 Newcastle Emlyn is a larger employment centre than St Clears, providing 1,200 jobs, compared to 800. This is a function of its slightly larger size and its more isolated location which means that it performs an important role in serving the surrounding area in the North East of the Spatial Plan Area. However, regardless of the relative number of jobs that are available in either of these local centres, it is evident that they both serve a local role which is dominated by a large proportion of non-B class activities. As such, they are therefore limited in the extent to which they complement Carmarthen as the key employment and economic centre in the eastern part of the Spatial Plan Area.



Total Number of jobs in Carmarthen Hub: 16,200

Total Number of jobs in Carmarthen Part of Spatial Plan Area: 21,000

Fig 27 Distribution of Employment in Carmarthen Part of Spatial Plan Area

Fishguard Hub

5.25 The Fishguard Hub does not perform a particularly well-developed economic function. Employment within each settlement is very limited and, save for the role of the town (which accounts for almost half of the jobs in Goodwick port), it is evident that both Goodwick and Fishguard serve as a local centre. As such, they both make a very limited contribution to the local economy and, in total, account for less than 3% of all jobs in the Spatial Plan Area. Given the emphasis that the Wales Spatial Plan places upon Goodwick and Fishguard as important drivers of the North Pembrokeshire economy, consideration should be given to whether the economic and employment role of the Fishguard Hub could be enhanced. This would enable it to better act as a hub serving the surrounding area and contribute more towards a greater level of complementarity within the Spatial Plan Area.

Conclusions and implications for Complementarity

5.26 This understanding of the relative distribution of jobs provides a helpful basis by which the complementary roles of the different hubs and settlements might be better understood. This analysis highlights the particular importance of the Haven Towns hub as a major employment destination and also the dominant role of the two County towns as key focal points for employment activity. Carmarthen and Haverfordwest together account for 42% of the total employment within the Spatial Plan Area. These main centres are complemented by other towns, particularly the linked settlements of Milford Haven and Neyland and Pembroke and Pembroke Dock. Whilst it is anticipated that these centres will continue to lead the economy within the Spatial Plan Area, the relative scale and type of growth that they will accommodate and their future roles and complementary relationships must be carefully considered so as to maximise the potential benefits for the economy and the local area.

5.27 The much more limited employment role of the Fishguard Hub is also a matter of considerable interest. Save for its role as a major maritime centre, this hub effectively serves as a local centre with only a very limited level of employment. This restricts its potential to serve North Pembrokeshire in the manner envisaged by the Wales Spatial Plan and has fundamental implications in respect of the extent to which it could be expected to perform a complementary role to the Haven Towns or the Carmarthen Hub.

5.28 Whilst the long term economic well-being of the Spatial Plan Area will depend upon maintaining and enhancing the economic function of the Primary Key settlements, it will also be important to consider the ways in which other centres (within and outside of the hubs) might be enhanced so that they might develop a greater employment function and so that a greater level of complementarity in the economic roles of the different centres might be achieved. In the future, this might necessitate a review of the definition of settlements and hubs so as to ensure a greater level of equitability in the roles that are performed by settlements within each hierarchical tier.

5.29 The basis for change must be rooted not only in an understanding of the relative scale of each centre but also in an appreciation of the particular economic role and function of the different hubs and settlements. Having considered the total employment levels across the Spatial Plan Area, the next section appraises the representation of key economic activities.

Key Economic Activities

5.30 The Wales Spatial Plan recognises that the Pembrokeshire-The Haven Spatial Plan Area is reliant on a few major, predominantly public sector employers and that whilst it has enjoyed major investment in the energy sector by multinational companies, it is dominated by small and micro businesses. In view of this current economic profile, it also recognises the importance of developing a more diverse and stable business economy in order to secure long term prosperity, noting that the continued development of indigenous business and the attraction of increased levels of inward investment will represent the key foundation for the long term economic wellbeing of the area.

5.31 Paragraph 5.1.2 of the Pembrokeshire UDP states that its economy is *"fragile, based on a narrow economic base of agriculture, fishing, the energy sector and tourism"*. It notes that the manufacturing and financial and businesses service sectors are both under-represented within the County. The Carmarthenshire UDP recognises a similar reality. Paragraph 5.01 states that *"traditionally, economic activity within the County has been centred around coal mining, metal processing, manufacturing and agriculture. In recent years attempts have been made to promote more diversified forms of employment opportunities by seeking to encourage the establishment of other types of industry"*.

5.32 In this section, we consider the relative representation of different economic sectors within the Spatial Plan Area. This has been based upon an analysis of Annual Business Inquiry Workplace Analysis Data for 2007. Data relating to the sectoral distribution of employment was obtained through an analysis of 2 digit SIC codes. Activities were then grouped into the following broader categories:

a Agriculture;

b Mining;

c Manufacturing (including energy storage and processing);

d Construction;

e Retail;

f Hotels and restaurants;

g Transport and communications;

h Business activities;

i Public administration;

j Education;

k Health; and,

l Other sectors (including sewage and refuse disposal, other service activities, activities of membership organisations which are not classified elsewhere and recreational, cultural and sporting activities).

5.33 The relative concentration of a particular economic sector in an area, compared to the national average can be shown by comparing location quotients (LQ). We set out below a series of charts which demonstrate the relative importance of the 12 broad economic sectors in employment terms on a settlement and hub basis in relation to their importance in Wales. The LQ of each sector in Wales is shown to be 1. An LQ above 1 for each individual settlement or hub would indicate a relative concentration of a particular economic sector (above the Welsh average), whilst an LQ of less than 1 would indicate a local shortfall of a particular sector, compared with the Welsh average. In assessing the relative importance of different sectors within the settlements it is, however, important to take account of the overall scale of employment in each area and the fact that a low LQ score in Carmarthen or Haverfordwest might disguise a relatively high number of employees in a certain sector. Drawing together the LQ scores and actual employment levels, we highlight those sectors that are dominant within particular hubs and settlements. This analysis informs the conclusions to this section which highlights the possible implications in terms of enhancing the economic profile of the Spatial Plan Area and achieving greater levels of complementarity through the identification and promotion of key growth sectors.

Haven Towns Hub

5.34 The Haven Towns Hub is the largest and most complex hub within the Spatial Plan Area, containing five Primary Key Settlements together with a number of smaller centres. The sectoral distribution of employment in the hub is similarly complex and reflects the relative strengths and opportunities of the key settlements.

Agriculture and Fishing

5.35 Although the actual number of employees in the agriculture and fishing sector in the Haven Towns Hub is very low, its relative importance is slightly above the Welsh average. Reflecting their location on the Milford Haven waterway, the relative importance of fishing activities in Milford Haven and Pembroke is of particular significance that 19% of all agricultural and fishingjobs in the Spatial Plan Area are provided in Milford Haven. However, in quantitative terms, this sector remains very limited in scale and is relatively unimportant to the overall economic well-being of the Haven Towns Hub.

Manufacturing and energy

5.36 Although the relative importance of manufacturing in the Haven Towns Hub is below the Welsh average, there is a particular concentration of activity in Milford Haven and Pembroke Dock which together account for 40% jobs in this sector in the Spatial Plan Area. The energy installations that have been developed on the Milford Haven Waterway represent the key component of the manufacturing sector in this Hub which has developed a strong national reputation and profile as a centre for energy activity.

5.37 There are two oil refineries located at Milford Haven Waterway and two Liquid Natural Gas (LNG) import, storage and regassification facilities at South Hook and Milford Haven. The Chevron facility contributes £60 million per annum into the local economy in terms of wages and locally resourced goods and services whilst the Murco refinery contributes between £30 and £40 million into the local economy each year. The LNG facilities make a further annual contribution of £10 million to the local economy.

5.38 In addition, planning permission for a new RWE nPower power station in Pembroke Dock was been granted in February 2009. Up to 2,000 people are likely to be employed during peak construction and the power station is expected to create over 100 high quality, long term operational jobs. It will also provide an ongoing investment of more than £10 million per year into the local economy.

5.39 The energy sector is very important for the Hub and for the Spatial Plan Area as a whole. Recognising this, the Wales Spatial Plan identifies a priority to develop a strategy for the Spatial Plan Area in order to provide a policy platform to establish opportunities for employment, skills and the environment arising from energy activities and, in particular, to make it a centre for continued innovation and investment. A number of opportunities for future activity in relation to this sector have been identified; these relate to the environmental and renewables sector, research and development and high technology activities. The long term contribution of the existing and these potential new sectors should be carefully appraised so that the diversity and value of the local economy in Milford Haven and Pembroke Dock – and the likely spin-off benefits for the wider Spatial Plan Area – might be fully realised.

5.40 Encouraging the energy sector to grow in both settlements – on both sides of the Milford Haven waterway – will provide the most robust basis by which its future growth might be sustained and sustainable. There is a complementary overlap between the function of these two settlements which should be maintained in the future.

5.41 In addition to the energy installations which dominate this sector, there are also some small-scale niche manufacturing activities within this area which provides an additional (albeit limited) level of diversity to the economy. Although the number of jobs in the manufacturing sector in the Haven Towns Hub is low when compared to the Welsh average, it nevertheless has a very important role to play at this time and in the future. Milford Haven and Pembroke Dock are, and are expected to remain, at the heart of this sector.

Transport and communications

5.42 There are three ports in the Pembrokeshire-Haven Spatial Plan Area: at Milford Haven, Pembroke Dock and Fishguard (which is located in Goodwick). The importance of the ports is reflected in the LQ scores for the transport and communication sector. Whilst the actual employment levels in the transport and communications sector in the three settlements is broadly similar – they each account for approximately 10% of jobs in the transport an communications sector in the Spatial Plan Area – its relative importance in Milford Haven and Pembroke Dock is substantially less than in Goodwick; this is illustrated in the LQ scores of 1.3 for Milford Haven and Pembroke Dock, compared to an LQ score of over 10 for Goodwick. This difference is a clear reflection of the scale of each settlement and the availability of other employment opportunities. However, it is important not to underestimate the importance of the port functions at Milford Haven and Pembroke Dock which are complementary to one another and also to the energy activities that are present in both settlements.

5.43 The energy sector in Milford Haven and Pembroke Dock has close links with the marine sector. 50% of port business within the Haven Towns Hub is related to the energy sector and the long term strength of the energy sector will continue to depend upon a vibrant local port base. The importance of the energy sector as a basis for port activities should not, however, serve to undermine a recognition of the important role of the ports as ferry terminals. In addition, a number of associated functions exist alongside the port activities within the Haven Towns Hub. These include the ship repair operations at Milford Haven and the marina activities at Milford and Neyland which have the capacity to play an important role for leisure and tourism purposes.

5.44 In all three locations, the potential to maximise the different opportunities that are offered by the ports should be carefully considered so that their benefits to the local economy and to the economic well-being of the Spatial Plan Area and Wales as a whole might be enhanced.

Construction

5.45 The major energy construction projects are also very important in establishing a connection between the energy and construction sectors. The scale of the operations is evident in the fact that Milford Haven has an LQ of 2.8 in respect of construction jobs and accounts for 12% of all jobs in this sector in the Spatial Plan Area. The number of construction jobs in Pembroke Dock is lower (accounting for 7.5% of jobs in this sector in the Spatial Plan Area) but this sector is nevertheless substantially more important locally than at the County level (LQ 1.6). Elsewhere in the Haven Towns hub, the relative importance of construction sector is substantially lower.

Business Activities

5.46 A particular concern in respect of the role of the Haven Towns is the relatively limited representation of business activities. Although this sector accounts for almost 2,000 jobs, the LQ score for the hub is just 0.6 – broadly equitable to that of Pembrokeshire as a whole. Almost one third of these jobs are provided in Haverfordwest whilst an additional quarter are located in Milford Haven. None of the settlements have an LQ score of more than 1, again suggesting that this sector is under-represented at present. This reality reflects that fact that the Spatial Plan Area is not viewed as a major commercial centre and so companies involved in financial services, insurance, property, IT, research and other business activities tend not to be attracted into the area. As such, it is unlikely that this sector will enjoy the level of representation that is evident in larger centres that are located to the east. Carmarthen presently contains 20% of business service jobs in the Spatial Plan Area whilst Haverfordwest provides 14% and in both cases, it is considered that there might be scope to increase this level of representation and to accommodate more business functions so that the needs of the local area might be better served in this area. However, the relative importance of each centre is likely to be maintained, with Carmarthen accommodating a greater overall level of business service employment.

5.47 This sector includes computer and related activities and research and development. This helps to explain the role of Milford Haven in this sector and, as shown above, there is considerable potential for the future enhancement of the role of these activities. The recent opening of a new Technium at Pembroke Dock as part of a science park demonstrates an important commitment to the promotion of the area as a high quality location for research and, although the representation of business activities in Pembroke Dock is limited (LQ 0.5), this facility provides an important basis for future growth. Whilst this might initially be related to the energy sector, other opportunities to develop research and development and high technology activities should be explored and promoted, for example building upon the opportunities that are presented by the large hospital the airport at Haverfordwest, as well as the expanding public sector and commercial sector in Haverfordwest and elsewhere.

Public Sector Activities

5.48 The dominance of the public sector within the Spatial Plan Area is particularly evident in the Haven Towns Hub which has an above-average level of representation in public administration, education and health, compared to Wales and Pembrokeshire. Over 9,500 people are employed in these sectors in the Haven Towns Hub, almost two thirds of which are employed in Haverfordwest. As the County Town, it is no surprise that the public administration sector is dominant within Haverfordwest, although it is noteworthy that whilst 50% of the total number of public administration jobs in Pembrokeshire – The Haven are in Carmarthen and 30% are in Haverfordwest, a further 10% are in Pembroke Dock such that it also has a substantially above-average (albeit much more limited) level of representation in this sector.

5.49 Much of the public sector employment at Pembroke Dock is related to the Department of Work and Pensions which operated a call centre in the town. This is important in diversifying the range of public sector employment in the area and, together with the existing high level of public sector employment at Haverfordwest, might provide a platform which might be used to attract additional Welsh Assembly or Central Government activities into the Haven Towns Hub.

5.50 As shown in chapter 9, the relative level of employment in health and education reflects the distribution of facilities.

Retail

5.51 The relative importance of particular towns within the Haven Towns hub as a retail centre is evident from the LQ scores which show Haverfordwest and

Pembroke Dock as particularly important centres. Haverfordwest accounts for 17% of retail jobs in the Spatial Plan Area (50% of retail jobs in the Haven Towns Hub) whilst Pembroke Dock accounts for 7.5% of retail jobs in the Spatial Plan Area (25% of retail jobs in the Haven Towns Hub). These findings reflect the conclusions set out in chapter 7 regarding the role and importance of different settlements as retail centres.

Hotels and Restaurants

5.52 The hotels and restaurants sector can be taken as a proxy for the tourism sector. However, only Pembroke has an LQ score of above 1 for the hotels and restaurants sector, suggesting that, despite Haverfordwest, Pembroke and Pembroke Dock having all been identified by the Wales Spatial Plan as being a tourism focus, this sector is not well developed within the Haven Towns Hub and that further efforts will be required to increase its role and representation. Haverfordwest has the largest number of jobs in this sector but, due to its dominant retail and public sector role, this equates to an LQ of only 0.7. We consider the role of the Haven Towns Hub as a tourism centre in more detail in chapter 6.

Complementarity within the Haven Towns Hub

5.53 As the largest employment centre within the Spatial Plan Area, it is particularly important to understand the extent to which the key settlements within the Haven Towns Hub relate to one another.

5.54 Taking account of the relative and actual representation of each sector, the primary economic sectors within the hub are seen to include:

a Public administration – Haverfordwest and Pembroke Dock;

b Education – Haverfordwest, Milford Haven and Pembroke;

c Health – Haverfordwest;

d Retail – Haverfordwest and Pembroke Dock;

e Energy activities – Milford Haven and Pembroke Dock;

f Transport and communications - Milford Haven and Pembroke Dock; and,

g Construction – Milford Haven and Pembroke Dock;

5.55 Whilst Haverfordwest is the main employment centre within the Hub, it is dominated by a relatively narrow base of public sector services and retailing. It also has some representation in the business services sector and, looking forwards, consideration should be given to the ways in which this might be enhanced. A greater role for Haverfordwest in this area would be complementary to its role as a public administration centre.

5.56 The service sector role of Haverfordwest is complemented by the concentration of ‘heavier’ activities within Milford Haven and Pembroke Dock, albeit that

Pembroke Dock's economy is rather more diverse and it also serves a role as a centre for public administration and retailing activities. The new science park at Pembroke Dock is also important in providing a basis for ongoing development in this sector and for the continued enhancement of the town.

5.57 An analysis of its LQ scores shows that Pembroke appears to have the broadest economic base with an above average representation in fishing, tourism, health and education. However, the total level of employment in Pembroke is relatively limited, such that its actual representation in these sectors is modest in relation to the other settlements. However, despite the limited number of jobs in Pembroke, it is clear that its broad economic base does have the capacity to complement the larger centres. Consideration should be given to the ways in which these existing economic activities in Pembroke might therefore be enhanced and developed further in this complementary manner.

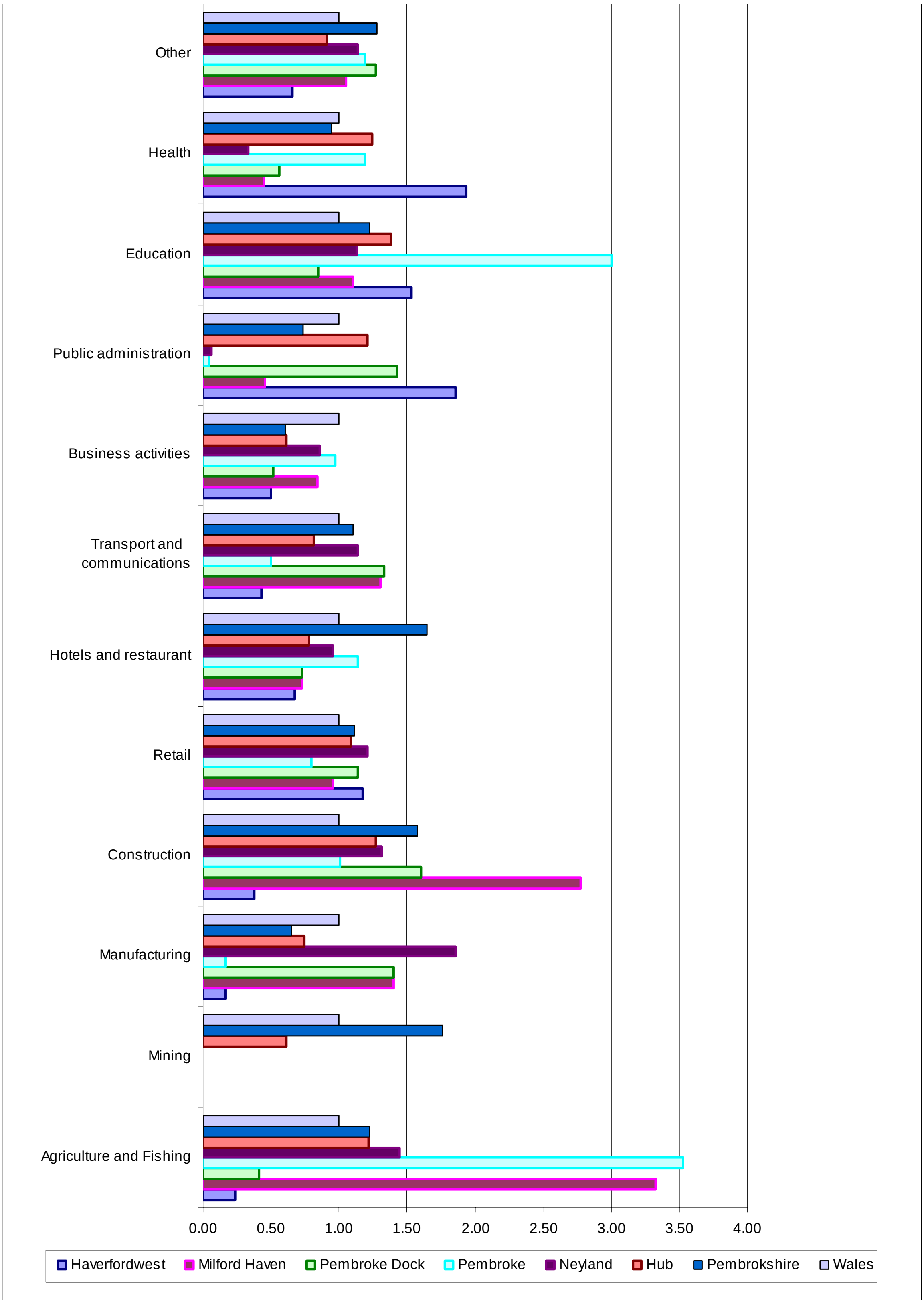


Fig 28 Sectoral Distribution of Employment in Haven Towns Hub

Fishguard Hub

5.58 Given the small number of jobs that are available in the Fishguard Hub, the actual level representation in each of the broad economic sectors is very limited. This supports the broad view that Fishguard presently acts primarily as a local centre and that it is failing to act as a key driver for the economy in the northern part of Pembrokeshire.

5.59 The most overwhelming trend that is shown within the location quotient chart is the dominance of the transport and communications sector within the Fishguard Hub. This is a reflection of the dominance of the port which provides freight services and four ferry crossing per day to Rosslare. The Port is located at Goodwick rather than Fishguard, thereby explaining the LQ scores in each settlement. It is, however, reflective of the overall level of employment within Goodwick and the hub as a whole that the port is so significant in terms of relative local employment levels.

5.60 It is understood that work is being undertaken in respect of the potential reconfiguration of the port facility so as to increase the capacity of the ferry terminal and to provide a leisure and residential based marina. This project would recognise and respond to the key role of the Fishguard Hub as a gateway into the Spatial Plan Area, a role that is identified in the Wales Spatial Plan vision for the area and which offers considerable opportunities in respect of the economy, tourism and the overall image and profile of the Spatial Plan Area.

5.61 Within a hub that otherwise serves a very limited economic role in terms of the overall number of jobs that are provided and the range of economic sectors that are represented, the promotion of the port should be given a particularly high priority.

5.62 The Fishguard Hub is under-represented relative to Wales and to Pembrokeshire in 7 of the other sectors. In particular,

a It has a very under-developed manufacturing sector (LQ 0.1). This might be a function of its relative location, some distance from other main economic centres and potential market areas, which might undermine its potential role as a key manufacturing centre.

b Although public services are recognised as being a dominant sector within the Spatial Plan Area and within Pembrokeshire as a whole, they are very poorly represented within the Fishguard Hub. The Fishguard Hub provides just 2% of public sector employment within the Spatial Plan Area (LQ 0.4). The health sector is similarly under-represented with an LQ of 0.7. By contrast, however, the education sector has an LQ of 1.5 in the Fishguard Hub (2 in Fishguard and 0.52 in Goodwick). This high LQ level is more reflective of the low level of total employment rather than a particularly high level of education provision.

c Employment in the business activities sector in the Fishguard Hub accounts for just 3% of total employment in this sector in the Spatial Plan Area. Over 85% of jobs in this sector in this hub are concentrated in Fishguard which, in spite of the low level of employment in this sector has an LQ of 0.85 – slightly above the Pembrokeshire average (LQ 0.6). This might be due to the relative distance of the hub from larger centres generating a demand for services to meet the needs of the local community. As part of the broader assessment of options for the enhancement of the local economy in the Fishguard Hub and the way that it might better serve the surrounding parts of North Pembrokeshire, consideration should be given to whether any opportunities might exist for the enhancement of this sector in the future.

5.63 Issues relating to the provision of retail facilities in Fishguard are considered in detail in chapter 7 of this report. This concludes that it is under-provided for in terms of both convenience and comparison retail facilities and that there is a considerable leakage of retail expenditure to other settlements, particularly Haverfordwest. Whilst the LQ for the retail sector in the Fishguard Hub is 1.1 – broadly in line with the Welsh average – this is reflective of a modest level of employment in the retail sector, set against a low level of total employment.

5.64 Fishguard is identified by the Wales Spatial Plan as being a tourism focus and this is, to an extent, reflected in the above level of employment in the hotels and restaurants sector within the FIshguard Hub. However, it is evident from the fact that about 3.5% of the total number of jobs in this sector in the Spatial Plan Area are located in the Fishguard Hub that neither Fishguard nor Goodwick have not fully developed the potential tourism links that are associated with their role as Key Settlements in the northern part of Pembrokeshire or as a port gateway to Ireland.

Complementarity within the Fishguard Hub

5.65 Save for the port which accounts for over 15% of employment in the Hub, Fishguard and Goodwick both serve a local employment role. Employment in the hub is limited and is based upon a narrow range of very small scale activities. Although it is not expected that it would develop into a particularly strong employment centre, consideration should be given to its potential enhancement so that it might be able to better serve the employment (and other) needs of the local community and the surrounding north Pembrokeshire area in the future.

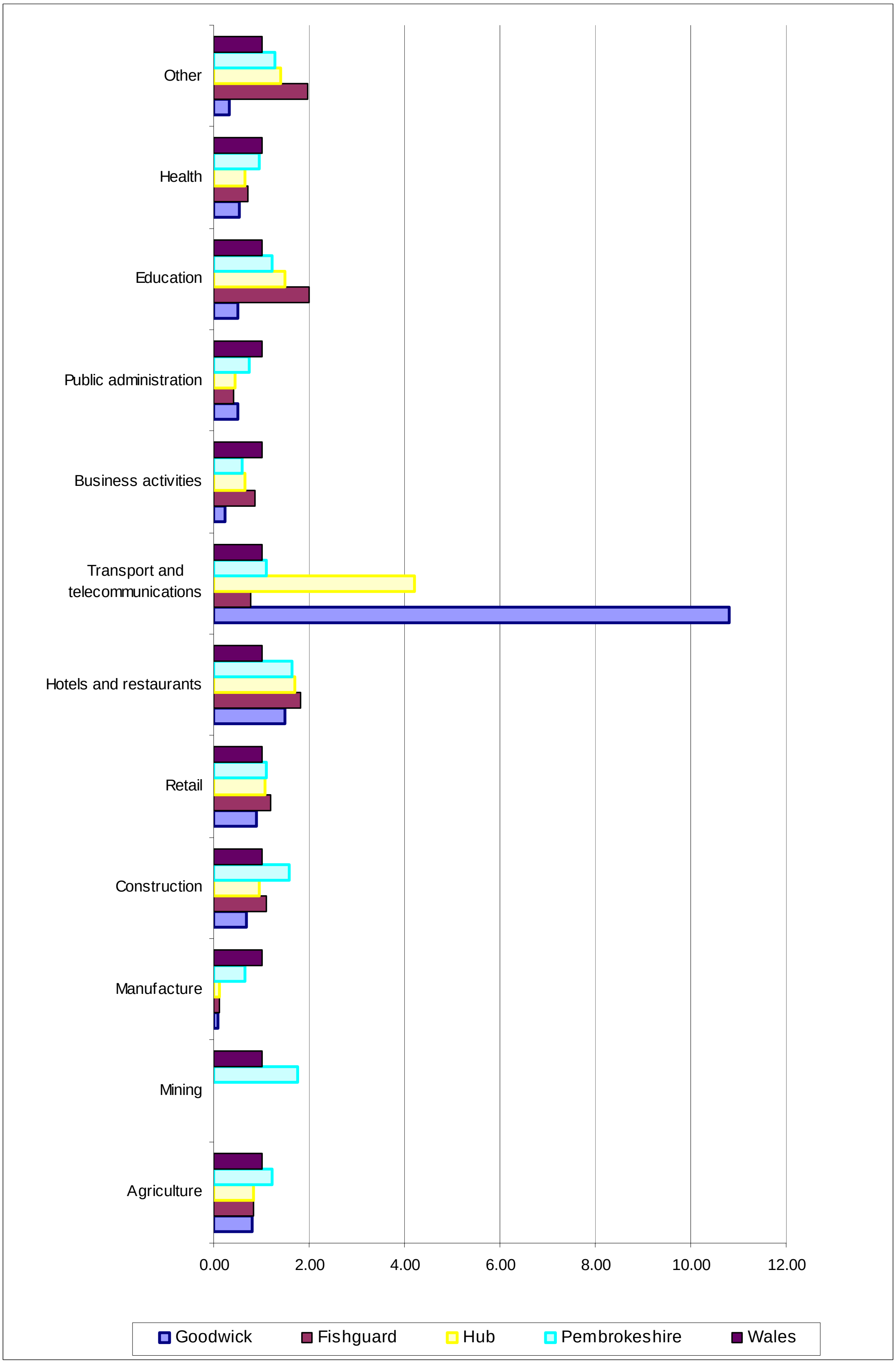


Fig 29 Sectoral Distribution of Employment in Fishguard Hub

Carmarthenshire

5.66 As has been shown, the boundaries of the Carmarthen Hub have been drawn tightly around the town such that the hub and the settlement are broadly analogous. In order to understand the relative importance of different economic sectors, we have therefore undertaken a review of the wider Carmarthenshire part of the Spatial Plan Area. As the Primary Key Settlement, however, we focus upon Carmarthen in this section.

5.67 Although the actual number of employees is very low, the role of the agriculture and fishing sector is relatively greater in the Carmarthenshire part of the Spatial Plan Area (LQ 1.3) than in Wales as a whole. Farming and forestry activities are particularly important but unsurprisingly given its urban character, this sector is not well developed in Carmarthen.

5.68 Manufacturing activities are similarly very much under-represented in Carmarthen in comparison to Wales as a whole and particularly to those parts of the Haven Towns Hub which have attracted a large scale of energy activities. Although the Carmarthenshire UDP recognises the role of metal processing and manufacturing within the local economy, it is evident that these sectors are focused in the larger settlements in the east of the County as they are substantially under-represented both in Carmarthen which provides just 7.5% of all manufacturing jobs in the Spatial Plan Area and also in the Carmarthenshire part of the Spatial Plan Area.

5.69 Employment in Carmarthen is dominated by public sector services. Over 8,500 people are employed in education, health and public administration, including over 5,000 people in health and over 2,500 people in public administration. The scale of the public administration sector in Carmarthen is substantially greater than in all other settlements in the Spatial Plan Area. This very high number of jobs (which accounts for over 50% of public administration jobs in the Spatial Plan Area and 45% of health jobs in the Spatial Plan Area) and the associated high LQ scores (2 for public services and health) reflects its status as a County Town.

5.70 Although it does not account for a large proportion of total employment in the town (LQ 0.5), Carmarthen accounts for more than 20% of the business service sector employment in the Spatial Plan Area. Whilst this clearly shows the local importance of this sector, it nevertheless reveals that it remains under-developed in Carmarthen (and in the Spatial Plan Area generally) in relation to other parts of Wales. Given the nature of the national economy, the potential importance of this sector within Carmarthen should be recognised. As indicated above in respect of Haverfordwest, we would not expect that this sector would grow into a dominant element of the local economy, particularly as Carmarthen would be forced to compete against larger business centres to the east. However, the existing level of employment within business services will provide a platform by which it might be developed in the future, albeit that considerable effort will be required to ensure that it might make a greater contribution to the local economy in the future. Its proximity to Llanelli and Swansea, its ease of access from the M4 motorway and the opportunities that are offered by the surrounding area to enjoy a very high quality of life would all form a basis for the establishment of a viable proposition of Carmarthen as a strong business location.

5.71 The retail sector is very important in Carmarthen which provides 25% of all retail jobs in the Spatial Plan Area. Interestingly, however, this only accounts to an LQ of 1.15. This high level of employment reflects the conclusions set out in chapter 7 in respect of its relative role as a retail destination for the Spatial Plan Area. By contrast, and despite having been identified by the Wales Spatial Plan as a tourism focus, employment in the hotels and restaurants sector is relatively limited (LQ 0.5), although Carmarthen does account for more jobs in this sector than any of the Haven Towns. This suggests that Carmarthen may not be performing the role that is expected of it and would necessitate consideration to the ways in which its role as a tourism centre might be enhanced.

Complementarity within the Carmarthenshire Part of the Spatial Plan Area

5.72 Given the way in which the boundaries of the Carmarthen Hub have been drawn, it is not possible to appraise complementarity within the hub itself. Within the Carmarthenshire Part of the Spatial Plan Area, Carmarthen is clearly dominant. Whilst some of the smaller centres do provide employment opportunities, these tend only to serve the local area and therefore do not complement (or compete with) the economic role of Carmarthen.

5.73 Taking account of the relative and actual representation of each sector, the primary economic sectors within Carmarthen include:

a Public administration;

b Health; and,

c Retail.

5.74 Whilst it is an important centre and performs a considerable role in respect of these and (to a lesser extent) other economic sectors, it is evident that Carmarthen's economy has a relatively narrow base. It would benefit from diversification and from the enhancement of some of the sectors for which it has some limited representation. In this regard, the business activities and tourism sector can be seen to offer particular opportunities.

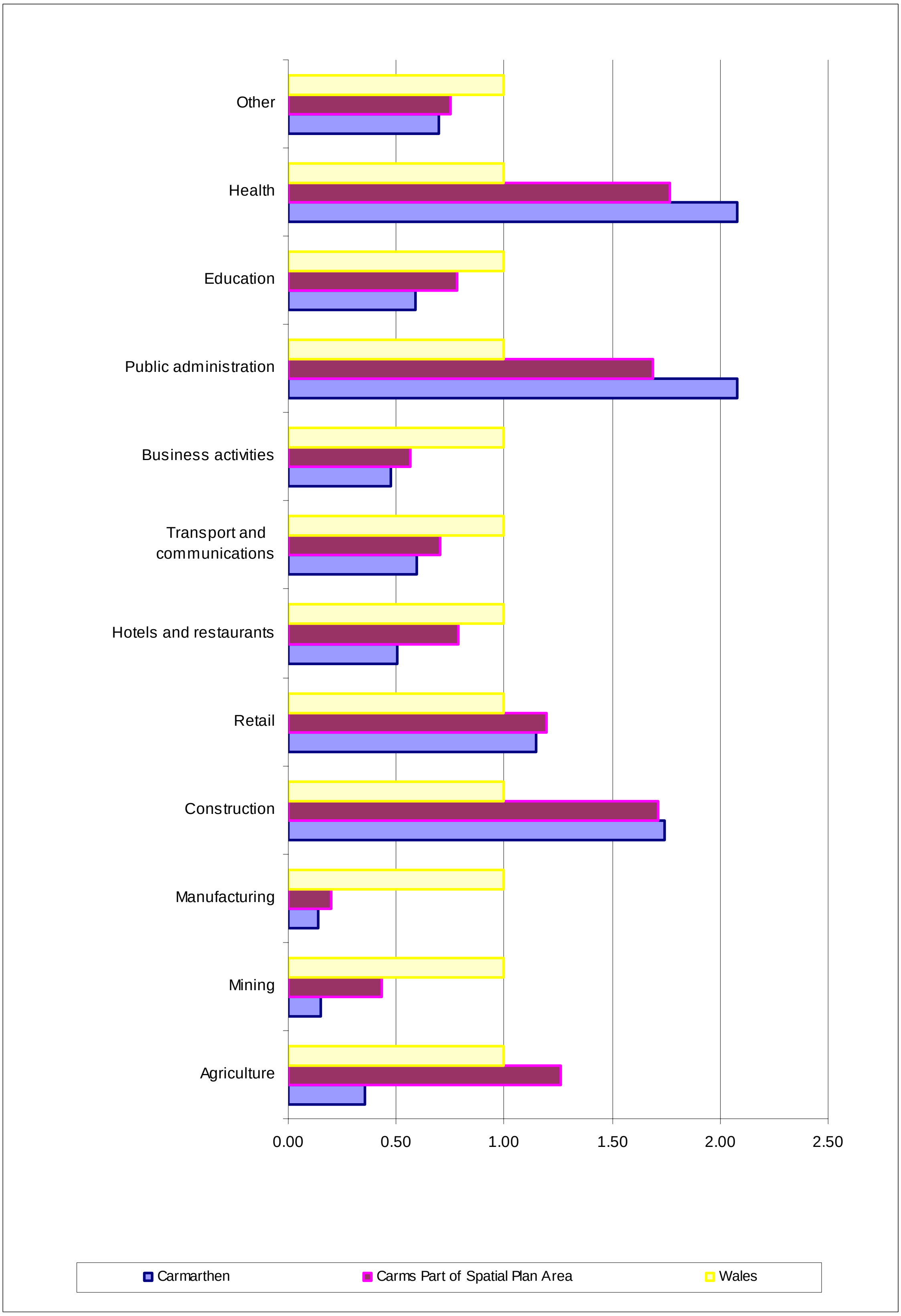


Fig 30 Concentration of economic activities in Carmarthen Part of the Spatial Plan Area

Distribution of Facilities

5.75 The previous sections have demonstrated the relative importance of different hubs and settlements as employment centres and in terms of specific economic sectors. This evidence can be supplemented by a review of the supply of business premises across the Spatial Plan Area. This has shown that the largest concentrations of business units are within the central commercial zones of Milford Haven, Pembroke Dock, Haverfordwest and Carmarthen.

Review of Valuation Office Agency Data

5.76 Data on the stock of commercial and industrial property within local authority areas is provided by the DCLG and the Valuation Office Agency (VOA). The VOA revalues commercial and industrial property every five years to set business rate values in line with an assessment of the current commercial and industrial rental market. The statistics used in this assessment are based on the 2005 VOA revaluation and have been provided by the Welsh Assembly Government in respect of the following land-use categories:

a Offices;

b Factories;

c Warehouses; and,

d Miscellaneous (non-commercial premises).

5.77 These broad categories provide an indication of the amount of employment land and quality of built employment floorspace for different employment uses. Where a particular settlement has less than 5 entries for a particular category then the data has been suppressed for disclosure reasons.

Employment Space in the Spatial Plan Area

5.78 The following table provides an overall breakdown of employment space within the Pembrokeshire – The Haven Spatial Plan Area. As data for settlements with less than 5 entries for a particular category has been suppressed then this summary may not reflect the total employment space within the Spatial Plan Area.

Business Unit	No of Units	Total Space (sq m)	Average Unit Size (sq m)
Offices	667	119,300	179
Factories	457	164,357	360
Warehouses	429	189,198	441
Miscellaneous	1,527	212,509	139

Source: VOA, 2005

Table 12 Breakdown of Employment Space in Pembrokeshire - The Haven

5.79 This summary highlights the importance of offices in terms of number of units (21.7% of total premises) and the importance of miscellaneous uses and warehouses in relation to the total employment floorspace in the Spatial Plan Area (accounting for 31.0% and 27.6% of total floorspace respectively). Miscellaneous uses predominantly consist of A1 service uses, A3 uses, halls visitors' centres and car parks. In terms of average unit size it is unsurprising that factories and warehouses are much larger than offices and miscellaneous uses.

Employment Space by Hub

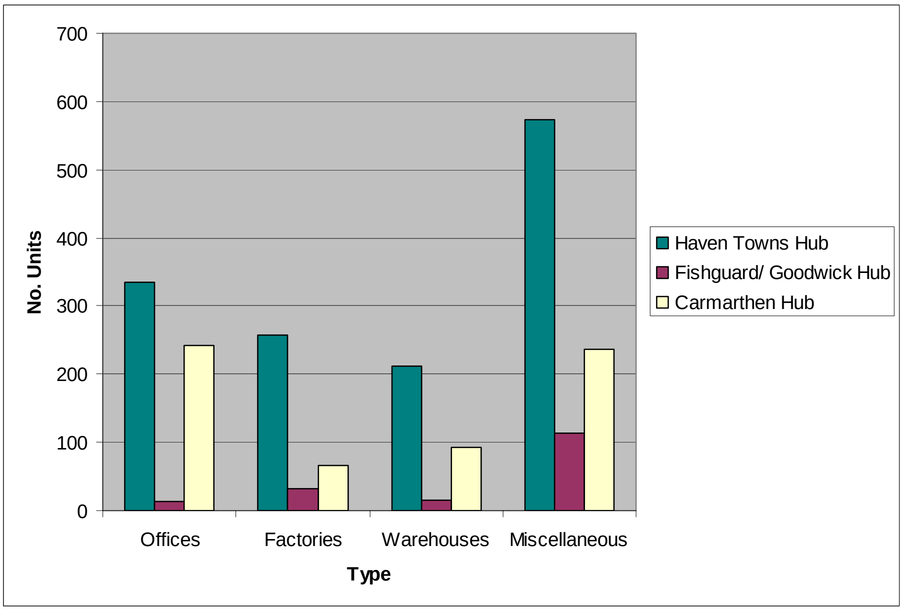
5.80 Our analysis of the VOA data has highlighted the importance of the Haven Towns Hub in terms of both extent of employment floorspace and the number of units, thereby reflecting its role as the main economic centre within the Spatial Plan Area. However, Carmarthen has the most offices and warehouses and largest amount of miscellaneous floorspace of any individual centre, reflecting its importance as the primary settlement within the Spatial Plan Area for employment and economic purposes. By contrast, both total employment space and the number of units within the Fishguard Hub are very limited, again reflecting its more local role.

Hub	Haven Towns	Carmarthen	Fishguard/ Goodwick
Total Floorspace (sq. m)	361,400	205,500	21,300

Source: VOA, 2005

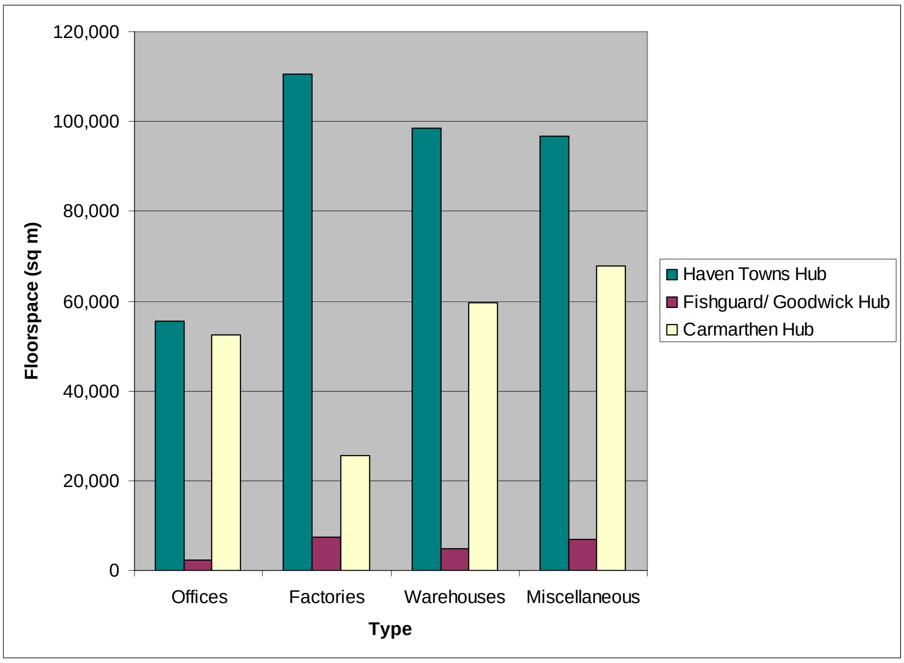
Table 13 Total employment floorspace by Hub

5.81 In both the Fishguard and Haven Towns hubs miscellaneous uses account for the largest proportion of employment units (64.6% and 41.7% respectively) whereas in the Carmarthen Hub the number of offices units is slightly higher (38% as opposed to 37.1% for miscellaneous uses). Whilst offices are the second most dominant units in the Haven Towns Hub (24.3%), they only account for 8.0% of units in the Fishguard Hub. Despite the low level of representation of manufacturing activity, factories account for the greatest proportion of floorspace in the Fishguard and Haven Towns Hubs (34.3% and 30.6% respectively) compared to only 12.5% in the Carmarthen Hub – although in spite of this, the number of factory units and amount of factory floorspace within Carmarthen is substantially greater than in the Fishguard Hub – a reflection of the substantial overall differences in the level of employment provision within the two area and the economic profile of the Fishguard Hub.



Source: VOA, 2005

Fig 31 Business Space by Hub - No. Units



Source: VOA, 2005

Fig 32 Business Space by Hub – Floorspace

Employment Space within the Hubs

5.82 A summary of total employment floorspace according to the evidence provided by the VOA data is set out below. This shows the very clear dominance of Carmarthen as an employment location and the extent to which provision in the Haven Towns Hub is dominated by three main centres. This data also supports the preceding analysis in respect of the very limited role of the Fishguard Hub as an employment location.

Settlement	Total Floorspace (sq. m)
Carmarthen	205,500
Pembroke Dock	118,770
Milford Haven	90,450
Haverfordwest	89,030
Tenby	43,840
Neyland	37,950
Newcastle Emlyn	26,500
St Clears	22,500
Pembroke	14,460
Fishguard	11,860
Narberth	11,850
Johnston	10,740

Saundersfoot	5,250
Goodwick	1,790

Source: VOA, 2005

Table 14 Total employment floorspace by settlement

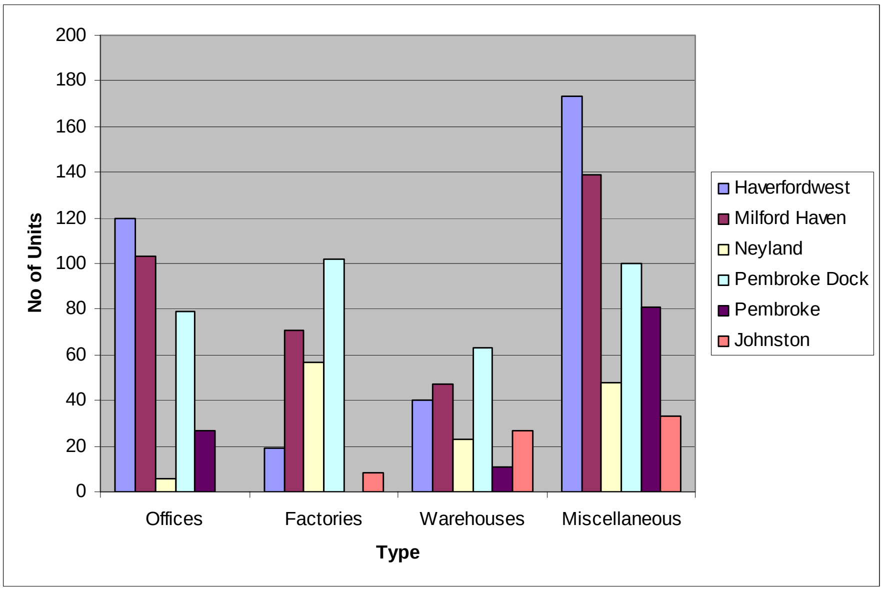
Carmarthen Hub

5.83 The Carmarthen Hub consists solely of the settlement of Carmarthen which is the key employment centre within the Spatial Plan Area. Whilst the Haven Towns Hub has the largest number of employment units and amount of employment floorspace, Carmarthen has almost twice the employment floorspace of Pembroke Dock, the next largest employment centre.

Haven Towns Hub

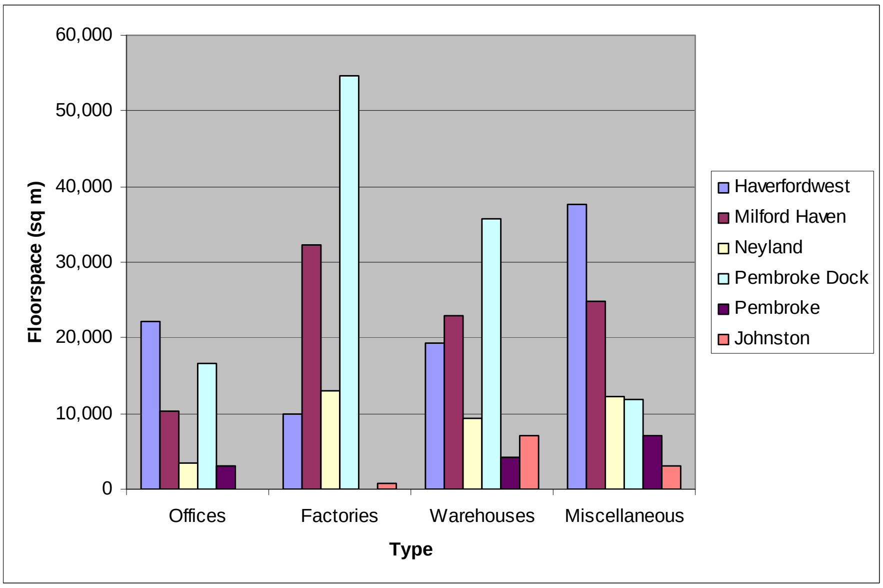
5.84 Haverfordwest has the highest proportion of office uses in the Haven Towns Hub with 35.8% of the office units and 39.8% of the total office floorspace. This reflects its role as the second largest employment centre in the Spatial Plan Area and its particular role in respect of public administration and business services. Although Haverfordwest employs substantially more people than any of the other Haven Towns, its overall level of employment floorspace is lower than Pembroke Dock and Milford Haven. This is due to the nature of employment facilities across the hub in respect of the particular importance of large-scale energy and port facilities at Pembroke Dock and Milford Haven and the high amount of office-based activity and the resultant high level of office space in Haverfordwest. The employment density levels for these different uses vary considerably. The comparatively lower level of employment floorspace in Haverfordwest can also be explained in relation to the high level of retail, education and healthcare employment within Haverfordwest – sectors that would not be incorporated within the VOA data.

5.85 Pembroke Dock has the largest proportion of factories and warehouses and has 49.4% of the factory and 36.2% of the warehouse floorspace in the Haven Towns Hub, although Milford Haven also has a significant proportion. This is due to the concentration of manufacturing and energy and port activities around these centres. Whilst Neyland and Johnston have a much more limited supply of employment floorspace, they both have a greater amount of factory, warehouse and miscellaneous floorspace than office floorspace.



Source: VOA, 2005

Fig 33 Business Space within Haven Towns Hub - No. Units

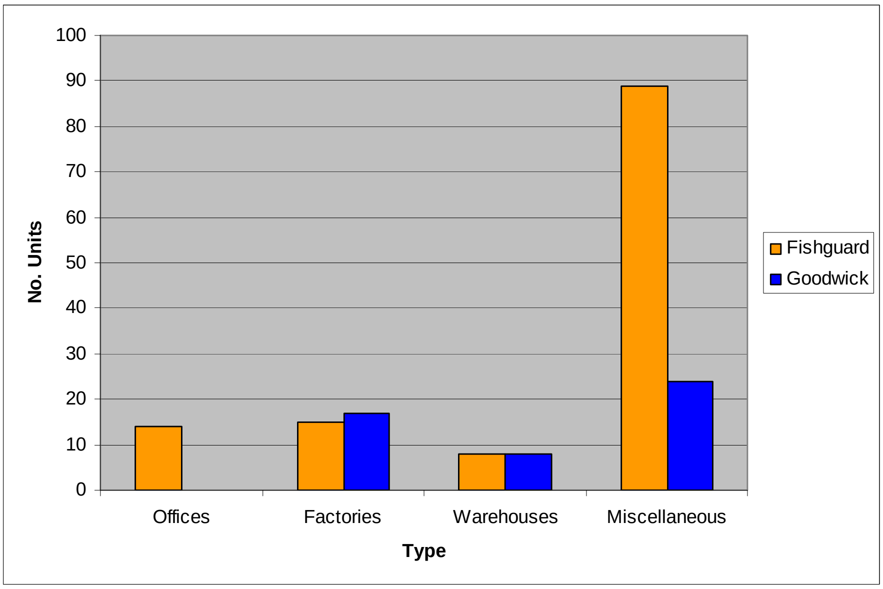


Source: VOA, 2005

Fig 34 Business Space Within Haven Towns Hub - Floorspace

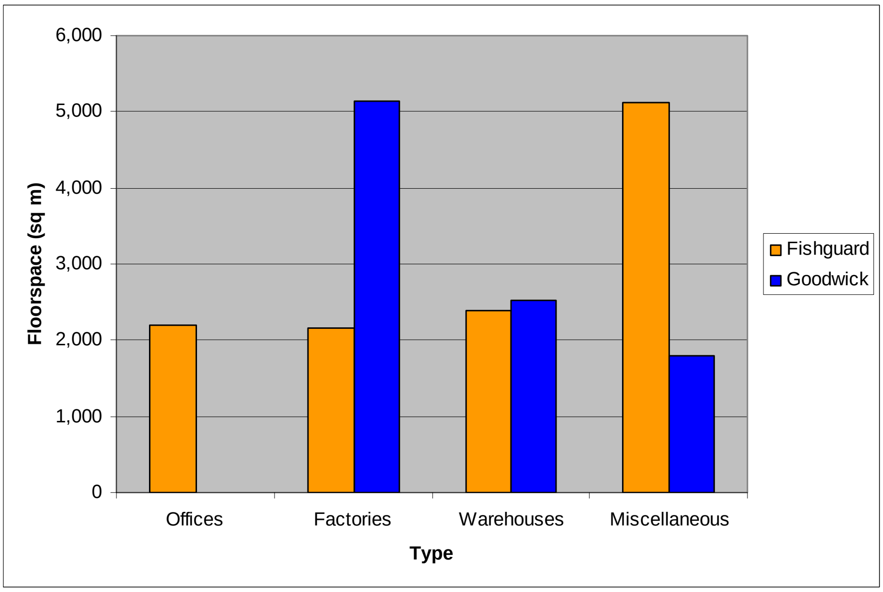
Fishguard Hub

5.86 Whilst Fishguard has over twice the number of business units as Goodwick, Goodwick only has slightly less floorspace. Fishguard has 14 offices whereas Goodwick has 5 or less reflecting both the limited role of office-based activity in this Hub and the relative concentration of business services within the Hub in Fishguard. Whilst the factory and warehouse units account for a significant proportion of employment floorspace in the Hub, the amount of floorspace is less than all the other settlements with the exception of Saundersfoot and Johnston.



Source: VOA, 2005

Fig 35 Business Space Within Fishguard/ Goodwick Hub - No. Units

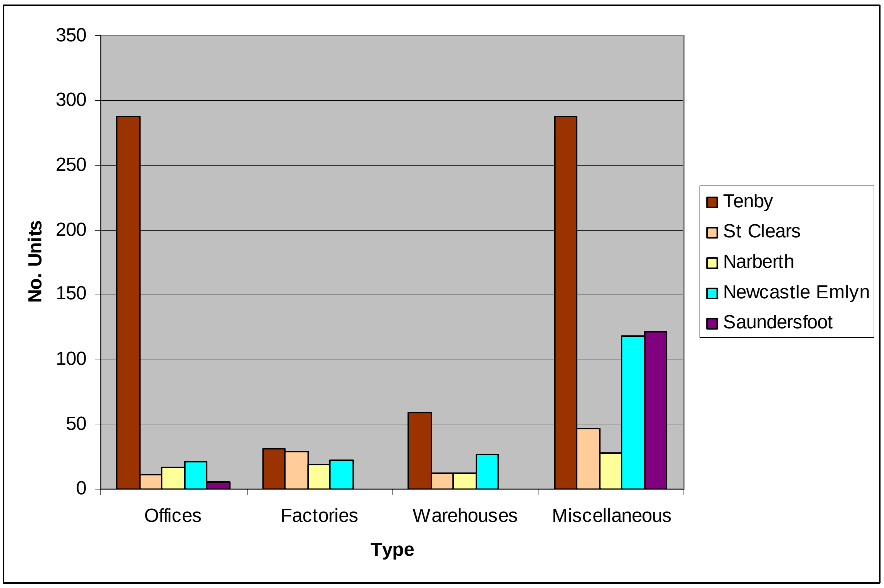


Source: VOA, 2005

Fig 36 Business Space Within Fishguard/ Goodwick Hub - Floorspace

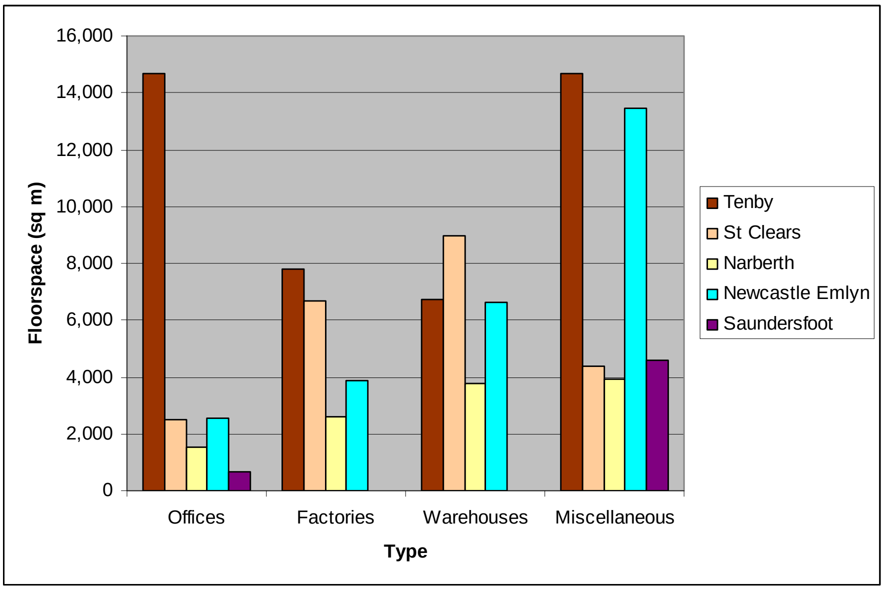
Employment Space in the Other Settlements

5.87 The following graphs provide a breakdown of employment space within the remaining settlements of Tenby, St Clears, Narberth, Newcastle Emlyn, Saundersfoot and Tenby:



Source: VOA, 2005

Fig 37 Business Space Within Other Settlements - No. Units



Source: VOA, 2005

Fig 38 Business Space Within Other Settlements - Floorspace

5.88 Tenby has both the largest number of employment units and amount of employment floorspace out of all the 'other' settlements. Indeed, it has more employment floorspace than the Fishguard Hub and has both the largest number of units and amount of floorspace for offices, factories and miscellaneous uses of the other settlements. However, St Clears has the largest amount of warehouse floorspace albeit that this is provided in a very small number of units.

5.89 Newcastle Emlyn and St Clears have more office, factory and warehouse employment floorspace than the smaller centres of Narberth and Saundersfoot. Whilst Newcastle Emlyn accounts for 2% of jobs in the Spatial Plan Area, it is surprising St Clears has more employment floorspace than Narberth as both centres provide 1.5% of jobs.

Existing Employment Locations

5.90 The Joint Unitary Development Plan for Pembrokeshire contains a policy (Policy 11) which seeks to protect and enhance existing employment sites. It details the main existing employment sites (in addition to town centres which are also recognised to have an important employment function and to make a substantial contribution to the local economy) within the County. Although the Carmarthenshire Unitary Development Plan does not specifically include this information, data on existing employment sites has been supplied to the study team by the County Council. These existing employment locations in each Council area are detailed below:

	Settlement	Hub	Area (Ha)
Primary Key Settlements	Carmarthen	Carmarthen	31.61
	Haverfordwest (Withybush)	Haven Towns	16.36
	Milford Haven	Haven Towns	37.04
	Pembroke Dock	Haven Towns	58.92
	Neyland	Haven Towns	13.99
			157.92
Primary Settlements	Fishguard	Fishguard	1.88
	Goodwick	Fishguard	5.08
	St Clears	-	5.08
	Whitland	-	5.49
			333.37
Local Centres	Newport	-	1.26
	Newcastle Emlyn	-	6.30
			674.3
Other settlements	Carew	Haven Towns	8.27
	Johnston	Haven Towns	4.47
	Waterston	Haven Towns	9.48
	Brawdy	-	3.07

	Scleddau	-	13.47
			38.76
Total			**221.77**

Source: Pembrokeshire Joint UDP / Carmarthenshire County Council

Table 15 Distribution of Existing Major Employment Sites in the Spatial Plan Area

5.91 The dominance of the Haven Towns Hub is particularly evident from this overview of existing employment sites. Almost 57% of existing major employment sites area located within the Haven Towns Hub, compared to 3% in the Fishguard Hub. However, within the Haven Towns Hub itself, the employment sites detailed above do not reflect the relative importance of the different settlements. In particular, the importance of Haverfordwest as the key employment location is not apparent. This is because the information contained within the Joint Unitary Development Plan does not include town centres, where the majority of jobs in Haverfordwest are located.

5.92 Similarly, this evidence also underestimates the importance of Carmarthen as the main individual employment location within the Spatial Plan Area. As for Haverfordwest, this is because the information supplied by Carmarthenshire County Council and detailed above relates only to major existing employment sites and does not include town centres, where the majority of jobs are located.

Employment Land Allocations

5.93 The Carmarthenshire Unitary Development Plan and Joint Unitary Development Plan for Pembrokeshire both include allocations for the development of land for employment purposes.

5.94 Policy E1 of the Carmarthenshire UDP states that a total of 401ha land will be allocated as key employment land between 2001 and 2016 in accordance with the overall strategic sustainable settlement framework. This is to include the following allocations within the Spatial Plan Area:

a Carmarthen (Growth Area) – 40.35ha;

b Newcastle Emlyn (Secondary Settlement) – 1.00ha;

c St Clears (Secondary Settlement) – 6.66ha; and,

d Whitland (Secondary Settlement) – 2.41ha.

5.95 Work relating to the supply and delivery of employment land in Carmarthenshire is currently under preparation. In addition, Policy E1 states that additional land will also be identified at strategic and local regeneration sites in accordance with Policies E15 and E16.

5.96 The allocations are distributed between Primary Key Settlements, Primary Settlements, Local Centres and Other settlements as shown below. The information for sites in Pembrokeshire is based upon the Joint UDP and information provided by Pembrokeshire County Council whilst the information for Carmarthenshire is based upon the UDP and information provided by Carmarthenshire County Council regarding proposed employment or regeneration sites:

	County	Settlement	Area (Ha)
Primary Key Settlements	Carmarthenshire	Carmarthen	273.95
	Pembrokeshire	Haverfordwest	36.8
	Pembrokeshire	Milford Haven	216.97
	Pembrokeshire	Pembroke Dock	217.52
	Pembrokeshire	Neyland	8.19
			753.43
Primary Settlements	Pembrokeshire	Fishguard	6.32
	Pembrokeshire	Tenby	0.77
	Pembrokeshire	Narberth	9.56
	Carmarthenshire	St Clears	9.45
	Carmarthenshire	Whitland	12.01
			1544.97
Local Centres	Pembrokeshire	Crymych	1.86
	Carmarthenshire	Newcastle Emlyn	7.4
	Pembrokeshire	St Davids	0.94
			3100.14
Other settlements	Pembrokeshire	Johnston	5.45
	Pembrokeshire	Trecwn	21.11
			6226.84
			828.30

Table 16 Distribution of Employment Land Allocations

5.97 Over 90% of employment allocations are concentrated in the Primary Key Settlements, and almost 65% of this amount is concentrated in the Haven Towns Hub. This emphasises the very considerable importance of this hub as a driver of the local economy, although it should be noted that the figures for Pembroke Dock and Milford Haven include the following two very large scale sites:

a Pembroke power station (Pembroke Dock) – 195.1ha; and,

b Esso refinery site (Milford Haven) – 209.3ha.

5.98 These allocations represent an important addition to the existing strength of Milford Haven and Pembroke Dock as a location for energy sector activities. However, even once these have been taken into account, the amount of remaining additional allocated employment land in the Haven Towns Hub is 75.08ha (including 36.8ha at Haverfordwest), compared to 40.35ha in Carmarthen.

5.99 In spite of a recognition that the amount of employment land in Fishguard is limited and that it has contributed towards its restricted economic role, the UDP has only allocated 6.32ha employment land on two sites at Fishguard:

a Fishguard Maesgwunne – 5.77ha (B1); and,

b Feidr Castell industrial estate extension, Fishguard – 0.55ha (B1 and B8).

5.100 Carmarthen and the Haven Towns Hub represent a clear focus of the proposed employment development. This is a reflection of their existing economic dominance and the particular importance of the Haven Towns as local base for the energy sector. These allocations are complementary to the existing provision of employment facilities within the Spatial Plan Area and would be important in helping to accommodate additional business activity. However, it is noteworthy that the Pembrokeshire Coastal National Park Authority LDP background paper states that there is a strong demand for industrial units outside the Haven Towns Hub but that there is a shortage of industrial units in Tenby and Saundersfoot and to a lesser extent St Davids and Fishguard, particularly as tourism provides a large potential market in these areas. This issue will be the subject of more detailed research as part of the current (and future) employment land reviews for each of the authorities although it is clear from this analysis that the provision and maintenance of an adequate supply of appropriate employment space in areas that reflect market requirements is, and will continue to be, essential to the economic well-being of the Spatial Plan Area and the enhancement of complementary relationships between the settlements.

5.101 In addition to the employment land allocations, both Unitary Development Plans also include policies relating to the development of non-allocated land for employment purposes. This provides a further basis by which the economic well-being of the Spatial Plan Area might be promoted, particularly through the delivery of smaller scale employment premises.

Employment Land Commitments

5.102 A summary review of major employment related permissions that have been granted within the Spatial Plan Area highlight a particular focus upon office and light industrial development in Carmarthenshire, all of which are in Carmarthen town. In addition, permission has been granted for some light industrial developments elsewhere within the Carmarthenshire part of the Spatial Plan Area, including light industrial premises at St Clears and also recycling related facilities at Whitland and Johnstown.

5.103 By contrast, the focus of permitted major employment development in Pembrokeshire is largely upon mainly heavier industrial schemes. In addition, Pembrokeshire Council, in partnership with the Welsh Assembly Government, has have built a Technium at Pembroke Dock, which has become part of the Wales Technium Network. The Technium provides units for high technology businesses, principally but not exclusively in the energy field. The main building comprises 36,000 sq. ft of accommodation including 19 office units. Adjacent to the main building are a further 13 independent workshop units.

Commuting Patterns

5.104 Analysis of the commuting patterns both within hubs and between hubs helps to provide a more detailed understanding of the strength of different centres for employment purposes.

5.105 Data from the Welsh Assembly Government statistical department shows very high levels of self containment (93%) for Pembrokeshire and a net inflow of 1,200 workers. Self containment levels are shown to be high for rural authorities (Ceredigion 91%, Gwynedd 85%) and also for the major cities (Cardiff and Swansea) but it is important to consider the extent to which the employment needs of local people are catered for in Pembrokeshire. This data set is different to our ABI sourced figures but shows the same conclusions.

5.106 Figures for Carmarthenshire show net-out commuting although relevance of this to this study is less as it includes a large part of the County that is outside the Spatial Plan Area and is substantially influenced by the pull of Swansea.

5.107 Maps in Appendix 3 shows the percentage of people travelling less than 5km and 10km respectively to work in different LSOAs in Pembrokeshire- The Haven. It is difficult to pick out general trends in the data as patterns in the percentage travelling less than 10km do not hold between different centres. Furthermore, analysis is only of the percentage of people travelling less than 10km rather than absolute numbers.

5.108 Generally the workplaces where 90% of people travel less than 10km to work are outside of the main settlements, presumably reflecting the nature of local agricultural employment in more rural areas as suggested by the SWWITCH Accessibility Assessment 2008. For Narberth, Whitland, St Clears, Carmarthen, Haverfordwest and Pendine the percentage travelling 10km or less to work is higher in the centre of the settlement than areas immediately adjacent to the centre or surrounding the centre. This indicates that the actual centres exhibit shorter journeys to work there in comparison to their immediate hinterland.

5.109 Some of the census output areas in and around the centre of key employment settlements like Carmarthen, Haverfordwest, Pembroke Dock and Milford Haven have less than 70% travelling less than 10km to work there, whereas smaller employment centres like Tenby, Pembroke, Fishguard and Neyland and Narberth have similar or higher percentages of employees travelling less than 10km to work. These percentages provide no indication of absolute numbers of people travelling less than 10km to their place of work. Although the percentages may be lower, the absolute numbers of will be much higher in the larger employment centres like Haverfordwest, Carmarthen, Pembroke Dock and Milford Haven.

5.110 The following analysis uses 2001 census data recording home and work destinations to investigate commuting patterns. Obviously 2001 census data is now dated and does not reflect new employment opportunities within Pembrokeshire – The Haven.

The Haven Towns Hub

5.111 The map of commuting pattern in the Haven towns hub (Appendix 3) shows commuting inflow to Haverfordwest from all other areas within the hub greatly exceeds the outflow; indeed the highest net number of commuters, 2,499, travels into the settlement. Haverfordwest is the largest employment centre in the hub with 10,000 jobs, whereas the smaller employment centres of Pembroke Dock and Milford Haven have 4,600 and 4,300 jobs respectively. Approximately 1/3 of the commuting inflow to Haverfordwest is from the Johnston, Burton, Llangwyn and Merlin's Bridge area to the south. The second biggest inflow to Haverfordwest is from Milford Haven which has the lowest level of self-containment in employment with net commuting outflow of 807. This suggests that Haverfordwest provides an important employment function for the residents of Milford Haven. Only in Pembroke Dock does the inflow to Haverfordwest come close to the outflow of 169, suggesting that this centre is more likely to fulfil a complementary employment role to Haverfordwest. Indeed, Pembroke Dock is the only other employment centre in the Haven Towns hub to experience a net inflow of commuters.

	Travel into	Travel from	NET
Haverfordwest	3287	788	**2499**
Pembroke Dock	1746	666	**1080**
Milford Haven	821	1628	**-807**
Pembroke	454	927	**-473**
Neyland	434	865	**-431**
Johnston	173	501	**-328**

Source: 2001 Census

Table 17 Net Commuting To Settlements in Haven Towns Hub

5.112 2001 census data does not reflect commuting patterns resulting from new employment opportunities at the LNG power stations in Pembroke Dock and Milford Haven. Indeed, it may be that these centres now fulfil an employment role which is more complementary to that of Haverfordwest than this analysis suggests by providing more employment in heavy industry.

The Carmarthen Hub

5.113 The map of commuting patterns around the Carmarthen hub (Appendix 3) shows that the commuting inflow to Carmarthen greatly exceeds outflow in all areas except (which forms part of Carmarthen town) Llangunnor where the inflow to Carmarthen is 439 and outflow to Llangunnor is 331. In-flow to Carmarthen from all four surrounding areas is broadly similar, between 330 to

440 people although the highest number of commuters come from Cynwel Elfed.

5.114 The table below suggests net inflow is lower than Haverfordwest, indeed inflow figures from the areas around Carmarthen are generally lower than those for Haverfordwest. This is surprising as Carmarthen has a greater number of jobs than Haverfordwest, 16,200 as opposed to 10,000. Figures do not suggest that Carmarthen is more self contained for employment than Haverfordwest, although Carmarthen does have a slightly larger population to take up available jobs. However, only inflow to Carmarthen from the Llansteffan, Cynwyl Elfed, Abergwili and Llangunnor has been considered in this analysis. Given that Carmarthen is the primary centre within the western part of the Spatial Plan Area it seems likely that some commuting inflow will come from beyond these areas and the overall inflow figure may therefore be higher.

	Travel into	Travel from	NET
Carmarthen	1590	424	**1166**

Source: 2001 Census

Table 18 Net Commuting To Carmarthen

The Fishguard/ Goodwick Hub

5.115 The map of commuting patterns around the Fishguard/ Goodwick hub (Appendix 3) shows both inflows and outflow are substantially less around the Fishguard/ Goodwick hubs than the Carmarthen and Haven Towns hubs. The highest flows are between the settlements of Fishguard and Goodwick 161 travelling from Fishguard to Goodwick to work and 141 from Goodwick to Fishguard. This suggests the settlements compliment each other in employment terms although the number of jobs in Fishguard is almost double that of Goodwick. Indeed, inflow to Fishguard from the surrounding areas of Scleddau and Dinas Cross is approximately three times higher at 86 and 72 respectively for Fishguard than Goodwick. Neither Fishguard nor Goodwick are large employment centres (with 1,100 and 600 jobs respectively). However, their relatively small populations of 3,582 in Fishguard and 2,093 in Goodwick means that people commute into the area to take up employment opportunities.

	Travel into	Travel from	NET
Fishguard	299	178	**121**
Goodwick	210	158	**52**

Source: 2001 Census

Table 19 Net Commuting To Fishguard and Goodwick

Commuting Flows Between Centres

5.116 The map of hub to hub commuting patterns (Appendix 3) indicates the absolute numbers travelling from hub to hub for work are not as high as the commuting figures within the hubs. The Haven Towns hub attracts the greatest number of workers from other hub areas; 537 from Fishguard and 138 from Carmarthen. The large numbers commuting to Haven Towns from the Fishguard Hub suggests that it does not provide sufficient employment opportunities and the Haven Towns Hub therefore fulfil a complementary employment function. More workers travel from the Haven Towns to the Carmarthen Hub than vice versa suggesting the Carmarthen hub still provides a higher order employment function and certainly the centre has the highest number of jobs of any single settlement. The 'pull' of the Fishguard hub is less although it attracts a significant number of workers, 173, from the Haven Towns hub. The numbers commuting between the Fishguard and Carmarthen hub are very low. It is unsurprising that few travel from the Carmarthen hub to Fishguard for employment opportunities; however, it is worth reflecting of the role of the transport infrastructure in supporting commuting. The average travel times between key employment centres in each hub follow, the public transport travel times are given for a Tuesday morning between 7:00-10:00:

- **Between Haverfordwest and Carmarthen –** The distance is 45km and it takes approximately 49 minutes by private car and 54-56 minutes by public transport
- **Between Haverfordwest and Fishguard –** The distance is 21km and it takes approximately 25 minutes by private car and 40-50 minute by public transport
- **Between Carmarthen and Fishguard –** The distance is 48km and it takes approximately 68 minutes by private car and 134 minutes by public transport from Carmarthen to Fishguard (it is not possible to travel from Fishguard to Carmarthen at this time)

5.117 Whilst transport links between these centres are subject to more detailed discussion in the transport Chapter, it is clear that the length of time taken to travel between Fishguard and Carmarthen particularly is a barrier to potential commuting between these settlements.

Analysis of Earnings

5.118 This chapter has highlighted a number of clear issues relating to the economic role of the different centres within the Pembrokeshire Haven Spatial Plan Area. This can be augmented by a comparative review of workplace earning and resident earnings. The purpose of this is to show changes in average income levels over time and in order to assess the extent to which people are forced to travel outside of the Spatial Plan Area in order to achieve higher earnings.

5.119 This information is based upon an analysis of the Annual Survey of Hours of Earnings by the Welsh Assembly Government's Statistical Consultancy Unit. It is not possible to disaggregate the data to an individual settlement or hub level in order to show the relative earnings of those living and workings in a specific location or to show the extent to which people are travelling elsewhere for higher paid jobs.

5.120 The table below sets out the mean average full-time gross weekly earnings (including overtime) for those living and working in the Pembrokeshire Haven Spatial Plan Area. Data for part-time employees are not included in official estimates of weekly earnings due to the wide variation of part-time hours that may apply. It is important to recognize, however, that part time jobs make up a substantial proportion of total employment in the Spatial Plan Area and so this exclusion might result in a potentially misleading view of local income. The table highlights the how the rate of increase in the mean earnings for those working in the area has increased at a faster rate compared to the mean earnings of those living in the area. The implication of this is that residents of the Pembrokeshire Haven Spatial Plan Area now have less need to travel elsewhere for higher paid jobs. However, the data suggests that residents of the Spatial Plan Area are not enjoying the full benefits of the highest paid jobs which are being taken by people that are travelling in from elsewhere.

5.121 This earnings information is important in highlighting the overall strength of the economy in the Spatial Plan Area, within which the mean average weekly wage for residents and workers is now above that of the Welsh average.

	2004 (£)	2008 (£)	*2008: Wales (£)*
Workplaces in the area	397	517	*498*
Residents of the area	411	509	*507*
Index of resident to workplace earnings	103.5	98.5	*101.7*

Source: Annual Survey of Hours and Earnings, ONS. Cited on WAG data set for Wales Spatial Plan Areas

Table 20 Mean Weekly Pay for Pembrokeshire Haven Spatial Plan Area

5.122 It is recognised that any data relating to mean earnings may be skewed by the presence of a number of particularly high paying residents or jobs. This is shown particularly clearly through a review of the lower quartile earnings, median quartile earnings and upper quartile earnings:

	Spatial Plan Area (2008)	Wales Average (2008)

Lower quartile earnings (level which 25% of employees earn less than)	296	311
Median earnings (level which 50% of employees earn less than)	397	421
Upper quartile earnings (level which 75% of employees earn less than)	632	600
Inter-quartile range (upper quartile less lower quartile)	336	289

Source: Annual Survey of Hours and Earnings, Office for National Statistics

Table 21 Distribution of full-time gross weekly earnings including overtime (workplace-based) (£)

5.123 This data shows that the overall position of earnings within the Spatial Plan Area being in excess of the Welsh average is due to the above-average wage level of the top earners. The majority of workers earn less than the Welsh average and the inter-quartile range shows the extent to which earning levels are dispersed and the reality that low earnings continue to be a problem for many people within the Spatial Plan Area. Efforts to diversify the economy and to encourage added-value activities should specifically seek to respond to this issue.

5.124 The data set out above which was made available by the Welsh Assembly Government is only available at the Spatial Plan Area level and cannot be disaggregated to show the position within individual settlements. However, information from the ONS Annual Survey of Hours and Earnings considers the mean, median and percentile earnings for those living and working in the Haverfordwest and Fishguard Travel to Work Area and in the Carmarthen and Llandovery Travel to Work Area. It is recognised that Llandovery is not located within the Pembrokeshire – The Haven Spatial Plan Area and that this data is therefore not entirely applicable but it is nevertheless helpful in showing the extent to which east/west differences exist.

	Median Weekly Pay (£)	Mean Weekly Pay (£)
Wales	342.5	404.9
Carmarthen and Llandovery	299.6	375.9
Haverfordwest and Fishguard	328.1	401.5

Source: Annual Survey of Hours and Earnings, Office for National Statistics.

Table 22 Gross weekly pay for all jobs - work based

5.125 This evidence shows that the mean weekly pay in both areas is substantially higher than the median pay. This supports the evidence set out above on the Spatial Plan Area level regarding the above-average wage level of the top earners. In both cases, the mean wage is broadly in line with the 65th percentile – substantially above the median level, although the data does indicate that those working in the Haverfordwest and Fishguard TTWA enjoy higher average earnings than those working in the Carmarthen and Llandovery TTWA.

5.126 It is important to note that the data set out in this section are based on different sources and therefore cannot be directly compared. The data for the Spatial Plan Area as a whole relates to average full time gross weekly earnings, including overtime. By contrast, the area specific data relates to all employee jobs.

Complementarity within the Spatial Plan Area

5.127 The analysis set out above shows the extent to which clear roles and functions can be seen within most of the Primary Key Settlements. In many respects, there already is a strong degree of complementarity between the hubs and the settlements. This is particularly evident within the Haven Towns Hub and also between Haverfordwest and Carmarthen which both serve important public sector and retail functions and which both have a clear basis for the continued development of the business services sector. Clear complementarity can also be seen in respect of employment activities within the Haven Towns Hub, with Haverfordwest, Milford Haven and Pembroke Dock all having clearly defined (and complementary) economic roles which can be understood in respect of the number of jobs within each centre, the key employment sectors that are represented in each settlement and the type of employment premises that exist. These main centres and hubs will continue to be dominant within the economy of the Spatial Plan Area and should be encouraged as such.

5.128 The level of complementarily between the Fishguard Hub and the other Hubs is, by contrast, much less apparent. The economy of the Fishguard Hub is weakly developed and, save for its role as a port gateway, tends only to serve the local area rather than making any positive contribution to the wider Spatial Plan Area. Consideration should be given to the policy implications that stem from this and the need to make specific choices regarding the future role of the Fishguard Hub. This might entail accepting that it acts as a local employment centre (with a port) and that its contribution to the economy of northern Pembrokeshire is limited or, alternatively, seeking to boost economic activity and employment levels within the town. Whilst the former option may be politically challenging, the latter option would be difficult to deliver in a manner that would be sustainable in the long term. A preferable solution would therefore be to build upon the economic opportunities that exist, recognising that it is a relatively localised centre with a limited economic base but that is nevertheless has an important role to play in supporting the two settlements and the surrounding area of north Pembrokeshire and, by virtue of its port role, the wider Spatial Plan Area.

5.129 In meeting future economic needs and serving the long term well being of the Spatial Plan Area, it will be important to concentrate on those areas and sectors that have the greatest capacity to serve the wider area. It is essential to recognise that some settlements will only ever be local centres as they are unable to attract or retain significant levels of investment. In most instances, the economic role of such centres will be focused upon non-B class activities such as retail, tourism, public services and, in some cases, agriculture. By contrast, other settlements will have a much more substantial role to play in supporting the economic well-being of the Spatial Plan Area. These centres, which already provide the largest numbers of jobs, will have a greater capacity to attract and support new investment and to sustain long term growth.

5.130 Throughout the Spatial Plan Area – in those settlements that are to serve a particularly important economic function and in those that are to remain less significant, the identification and promotion of a sufficient level of land that is in the right location and of appropriate quality will be central to the encouragement of economic growth:

a There is some evidence of increasing development in Carmarthen, Haverfordwest, Milford Haven and Pembroke Dock to help cope with demands but more premises are required to fully meet all of the demand for growth. Further work is required to appraise the amount and type of employment land that is required in each of the three local authority areas that form the Spatial Plan Area and to identify the distribution of such growth. However, these main settlements should be identified as the key locations for development.

b A shortage of premises has been indentified in the north of the Spatial Plan Area and this results in an inability to play a complementary role in respect of employment growth. Although the scale of future employment is not expected to match that within some of the larger settlements, the provision of additional premises in Fishguard and Goodwick would provide an important basis for a greater level of economic activity in this Hub location and to allow for the maximisation of the economic benefits associated with its role as a port location.

c Small scale activities can be more evenly distributed in smaller centres across the Spatial Plan Area. Recognising that the Spatial Plan Area is represented by a large number of small-scale businesses which can operate from a wider range of locations (not just in the hubs or in the main settlements), policy consideration should be given to the way in which support can be given for the development of workspace in appropriate locations and the promotion of home-working as a basis by which activity levels might be enhanced and the economic complementarity of smaller centres might be promoted. This would require input on a number of levels relating to planning, communications, training, business mentoring, and financial support. The Community Action Plans for the local centres provide some helpful insight into the scope for niche business development within smaller centres. For example, the St Davids Plan identifies potential of those owning second homes to relocate their businesses to St Davids if suitable business start-up were offered. Similarly, the Newport Plan envisages building on its eco image through expanding the eco centre, eco tourism and farm diversification such as organic farming. This provides a basis by which the local-level economic role of small centres might be enhanced and economic complementarity might be promoted across the Spatial Plan Area.

Economic Sectors

5.131 The issue of the narrow economic base within the Spatial Plan Area is a matter of some concern. Even in those areas that enjoy a strong employment market and that offer a large number of jobs, it is apparent that there is a limited range of economic activities – principally relating to public sector and non-B Class activities. The vision for the Spatial Plan Area is for *"a robust, sustainable, diverse high value-added economy"*. It is evident that this ambition is not presently being fulfilled. In order to ensure that the vision for the area can be achieved, consideration should therefore be given to the potential opportunities that exist for the development of a broader and more stable economic base and the way in which this might add to the complementarity of the existing settlements and hubs.

5.132 The Welsh Assembly Government's Strategic Framework for Economic Development, *Wales: A Vibrant Economy*, cited an initial set of ten sectors that were indentified in *A Winning Wales* as being important for future economic growth, as follows.

a Automotive;

b Aerospace;

c Agri-food;

d High technology;

e Pharmaceuticals/bio-chemicals;

f Financial services;

g Creative industries;

h Construction;

i Hospitality, leisure and tourism; and,

j Social care.

5.133 There is no expectation that all of these sectors could come forward within the Pembrokeshire Haven Spatial Plan Area and, indeed some would not be appropriate within the local area. However, it provides a stating point for the consideration of potential growth sectors.

5.134 The mid-term review of the Carmarthenshire economic strategy those sectors that are and are not considered to have the potential for future growth, as follows:

High Growth Prospects and Relatively High Share of Employment	High Growth Prospects and Relatively Low Share of Employment
Auto components Retailing Tourism Professional services Knowledge Education Health/social care Construction	Food /drink Computing services Creative Environmental goods Non-food primary processing Biotechnology Other transport services Electronics / electrical engineering
Relatively High Share of Employment but Low Growth Prospects	**Relatively Low Share of Employment and Low Growth Prospects**
Agriculture Metal Goods Public passenger/freight road transport Public administration	Mining Other manufacturing Banking, finance and insurance

Source: Carmarthenshire Economic Strategy, mid-term review

Table 23 Potential Growth Sectors

5.135 Again, there is no expectation that all of these sectors could come forward within the Pembrokshire Haven Spatial Plan Area and it is recognised that this only provides an indication of the Carmarthenshire perspective of growth. However, from these sources and our review of the existing sectoral distribution of employment within the Spatial Plan Area, we consider that the potential for growth of the following key sectors within the Spatial Plan Area should be appraised:

a **Health and social care** – this will draw upon the ageing local population and will be concentrated within the existing facilities.

b **Education** – although changes in the demographic profile of the Spatial Plan Area will impact upon the level of growth in this sector, it will nevertheless continue to be very important as an employment sector and as a public service within the Spatial Plan Area.

c **Retailing** – the retail sector is expected to continue to expand (albeit at a lower rate in the short term) and efforts to restrict the loss of retail expenditure to larger centres outside of the Spatial Plan Area will necessitate further investment and enhancement. Whilst additional retail facilities are required in the Fishguard Hub, it is anticipated that the key areas of growth are most likely to be those centres that are already recognised to be strong retail destinations unless specific regeneration proposals seek to direct growth into particular centres. A detailed assessment of the likely growth in this sector is set out in chapter 7.

d **Tourism** – the tourism sector is very important to the local economy in the Pembrokeshire Haven Spatial Plan Area and it is expected that its significance will increase in the future. It is expected that this will be predominantly concentrated in those areas that are already the most popular tourist centres albeit that particular efforts should be given to boosting the level of tourism activity and the attractiveness of the Primary Key Settlements as tourist destinations. In considering the future development of the tourism sector, it is important to ensure that consideration is given regarding the ways in which the economy might be developed (including through tourism) without undermining the environmental qualities upon which the tourist industry relies. Whilst this is particularly important within the National Park, it is a significant consideration for all parts of the Spatial Plan Area. A detailed assessment of the likely growth in this sector is set out in chapter 6.

e **Energy sector and associated activities** – the energy sector is very well developed within Milford Haven and Pembroke Dock. It is anticipated that this will be sustained, particularly in view of the substantial investment that has been made in this area and the profile that it has developed as centre of excellence in this sector. The continued concentration of heavier forms of industry into Milford Haven and Pembroke Dock minimises potential for environmental conflict and is also important in emphasising the employment and economic role of the Haven Towns Hub. This role is complementary to the roles of other centres whilst the concentration of activity along north and south shores of the Milford Haven Waterway is important maximising the economic benefits offered by this sector.

The opportunity now exists to expand this sector and to attract associated high technology, environmental and engineering activities so that the Haven Towns Hub might develop into a strong centre for a wider range of energy and science activities. The recently completed Technium at Pembroke Dock and the Cleddau Bridge Business Park both represent good examples of the way in which this sector is already being promoted. The scope of the energy strategy that is referred to in the Wales Spatial Plan should be broadened to consider opportunities to develop wider ranging science activities and should be viewed as an opportunity to identify the specific requirements for this sector in terms of property, skills, marketing, investment and on-going support. In view of the existing strength in this area, we anticipate that growth would be concentrated into Milford Haven and Pembroke Dock where it will be able to enhance the strength of the Haven Towns Hub and complement the role Haverfordwest as an administration (and increasingly, a commercial) centre.

f **Transport and Communications** – there is considerable potential to expand the role of the ports and marinas within the Spatial Plan Area (at Milford Haven, Pembroke Dock, Neyland and Goodwick). The enhancement of the ports would represent an important link to the energy sector and would also serve as a gateway into the area from the Republic of Ireland which would be important in promoting the profile of the area. In addition, the development of marinas would be important in enhancing the leisure and tourism role of some of the main settlements, thereby facilitating a diversification of the offer in respect of these key sectors.

In the longer term, there might also be some potential to develop the role of Haverfordwest airfield, both as a transport hub and also as a basis for aviation-related high technology activities.

g **Business services** – this broad sector is dominant within the UK economy and, although it has been particularly affected by the current economic downturn, it is widely accepted that it will recover and that its dominance will continue. The business services sector is broad and includes the high technology activities that are considered above as potential key growth areas for Milford Haven and Pembroke Dock.

Other areas of the business services sector include financial and property services and consultancy. Whilst these might tend to concentrate within major centres, there are some opportunities for growth within smaller settlements. Carmarthen and Haverfordwest have already developed a relatively modest base in this sector and consideration should be given to the ways in which business service activities might increase in number and scope. Achieving this objective will necessitate an appropriate provision of property, together with the provision of adequate skills and support mechanisms to help businesses establish, grow and prosper. Consideration should also be given to the way in which the area might be made more attractive as a location for investment by business service companies. Although the geographical location of the Spatial Plan Area means that any business service sector that develops is likely to predominantly serve the local area, it is evident that there is the potential to encourage this as a growth sector following the recovery of the national economy. In the first instance, the County Towns of Carmarthen and Haverfordwest would represent the most appropriate locations to seek to focus business service activity although, over time it might be possible to encourage the promotion of activities in other settlements.

h **Public Sector Activities** – the future development and enhancement of public sector activities is predominantly driven by political decisions rather than by market forces. As such, its promotion will require strategic political intervention rather than through the creation of attractive market conditions, the provision of premises and the establishment of an appropriate business environment. Although there is unlikely to be any substantial increase in the level of public sector activity at a County level, consideration should be given by the Welsh Assembly Government as to whether Carmarthen or Haverfordwest would represent appropriate locations for the relocation of public sector activities (either central government or Welsh Assembly functions). The presence of Welsh Assembly Government facilities in Carmarthen and a Department of Work and Pensions office in Pembroke Dock represents an important basis by which the Spatial Plan Area might be promoted as an appropriate location for government services and, as such, a platform for future growth and development in this area.

Conclusion

5.136 The existing focus of employment and economic activity and sectors represents the primary basis for future development within the Spatial Plan Area. In establishing a strategy for growth, the key issues must include the continued building upon existing strengths; the promotion of diversity within the economic base; and the encouragement of added value sectors. The delivery of space and physical capacity at the right time and in the right locations will be important in meeting the existing needs of the local economy and in helping to attract new activity into the local area.

5.137 The continued promotion of the main centres and the encouragement of existing and potential new economic sectors within these areas will be central to the long term viability of a strong and diverse economy. Such locations offer the greatest capacity to encourage and sustain activity and investment, to the benefit of the Spatial Plan Area as a whole. In addition, the economic profile of the Spatial Plan Area should be supported through the encouragement of small-scale employment activity within the local centres – either through the development of facilities in appropriate locations or through the promotion of home-working.

5.138 However, as the level of employment within the local centres is expected to remain modest, the promotion of strong and enhanced infrastructure connections will be particularly important as a basis for the dissipation of the full benefits of stronger economic centres and the achievement of complementary relationships.

6.0 # Tourism

6.1 The Wales Spatial Plan recognises the importance of tourism as a component of the local economy and seeks to provide a basis by which it might be further promoted. It states that the Pembrokeshire – The Haven Spatial Plan Area should be developed into a premier year-round destination which is focused upon ensuring a high quality offer that reinforces its distinctive and attractive character. The Wales Spatial Plan particularly recognises the important attraction of the coastline and the dominance of the coastal corridor from Tenby to Laugharne as a key component of the local tourism offer.

6.2 The local importance of tourism is underlined in the tourism strategy for South West Wales. This emphasises the strength of the Pembrokeshire tourism brand and the particular attraction of the coastline within the Pembrokeshire – The Haven Spatial Plan Area. This understanding of the impact of the quality of the environment and the coastline upon the tourism sector within the Spatial Plan Area provides a key basis by which the complementarity of the different settlements and hubs might be more fully appreciated.

6.3 The implication of the quality of the natural environment and coastline in contributing towards local tourism is that the relationships between settlements and hubs in respect of tourism matters are different than for other sectors. Some of the smaller settlements which are not located within hubs are seen to have a particularly important influence upon tourism activities. This will have a significant impact upon future policies which are intended to enhance the well-being of particular settlements and the Spatial Plan Area as a whole in accordance with the vision set out in the Wales Spatial Plan.

Tourism within the Spatial Plan Area

6.4 Although data relating to tourism levels is not available for the Spatial Plan Area as a whole, evidence from the 2007 Pembrokeshire and the 2007 Carmarthenshire STEAM reports demonstrates its significance. The data is only available for Carmarthenshire as a whole and cannot be disaggregated to provide data for the part of the County that is located within the Spatial Plan Area.

6.5 In 2007, 4.2 million people visited Pembrokeshire and accounted for a total of almost 13.5 million tourist days. 55% of visitors stayed for more than one night and the average stay (for all visitors) was 3 days. The average length of stay for overnight visitors was 5 days, highlighting the importance of short breaks to local tourism. Tourism contributed £500 million to the local economy (including indirect expenditure and VAT).

6.6 In 2007, 2.7 million people visited Carmarthenshire and accounted for a total of some 5.5 million tourist days. 30% of visitors stayed for more than one night and the average stay (for all visitors) was 2 days. The average length of stay for overnight visitors was 4 days. Tourism contributed £275 million to the local economy (including indirect expenditure and VAT). This data shows that the tourism sector is substantially less important in Carmarthenshire than in Pembrokeshire, albeit that the County is still a popular visitor destination and this sector represents an important element of the local economy.

6.7 Despite efforts to promote year-round tourism, the evidence shows a strong seasonality within Pembrokeshire with 55% of tourist days and 60% of tourism expenditure being concentrated into the four-month period from June to September 2007. 75% of tourist days and tourism expenditure was concentrated into the six-month period from May to October. This concentration of activity into a relatively short peak period creates some considerable challenges in respect of the provision of services and facilities and the maintenance of year-round vitality within the key tourism centres. Whilst tourism in Carmarthenshire is still very seasonal, it is slightly less so: 45% of tourist days and 48% of tourism expenditure was concentrated into the period between June and September 2007, whilst 63% of tourist days and 67% of tourism expenditure was concentrated into the six-month period from May to October.

6.8 An understanding of the relative importance of different centres within the Spatial Plan Area in respect of tourism activity can be achieved by a review of visitor patterns, the provision of accommodation and facilities, and an analysis of employment levels in different parts of the Spatial Plan Area. We consider each of these broad topics in turn below.

Visitor Destinations

6.9 The Pembrokeshire Visitor Survey 2007/2008 was undertaken on behalf of Pembrokeshire County Council, South West Wales Tourism Partnership and Pembrokeshire Coast National Park Authority. The research was based upon over 1,500 surveys that were undertaken throughout Pembrokeshire, in addition to a further 200 surveys that were undertaken in West Carmarthenshire. The study shows that the sample provides a statistically reliable representation and can therefore be relied upon to draw conclusions about the role of tourism within the area.

6.10 For the purposes of this study, the most interesting questions in the Visitor Survey related to the location of accommodation and the towns and areas that were visited by people on holiday in the area.

Location of Accommodation

6.11 The survey asked the visitors that stayed overnight where their accommodation was based. Although over 40 destinations were mentioned, a number of locations were found to be particularly significant. In general, the coastal areas were shown to be much more significant tourism accommodation centres compared to the main settlements within the hubs. The main report only reported the findings of the main Pembrokeshire survey although the additional surveys that were undertaken in West Carmarthenshire are also of interest.

6.12 Of all the people that were surveyed (in Pembrokeshire and West Carmarthenshire), 18% stayed in Tenby, 10% stayed in St Davids and 7% stayed in each of Newport and Saundersfoot, compared to just 3% in Pembroke and 3% in Haverfordwest. The distribution of the locations in which visitors stayed is shown by broad area below:

Area	% People Staying
Coastal Corridor from Laugharne to Tenby	38
St David's Area (St Davids, Solva, Newgale, Broadhaven, Little Haven)	17
Newport	7
Haven Towns Hub	8
Fishguard Hub	5
Carmarthen Hub	1

Source: Pembrokeshire Visitor Survey Report 2007/2008

Table 24 Location of Staying Visitors

6.13 These findings are very important in highlighting the significance of the smaller coastal settlements as tourist centres – especially those within the coastal corridor – particularly when compared to the main hub Settlements. This raises important questions about the tourism role of the Primary Key Settlements and the hubs and the extent to which they are serving the needs of visitors to the area. It should be noted, however, that the results for the Carmarthen Hub are likely to be skewed by the survey which was focused on Pembrokeshire rather than Carmarthenshire and only surveyed 200 people in West Carmarthenshire. Interestingly, 11% of those surveyed in West Carmarthenshire stayed in Carmarthen – potentially suggesting a greater tourism role than the Haven Towns and the Fishguard Hub settlements.

Towns / Areas Visited

6.14 Having identified that the majority of staying visitors to the Spatial Plan Area do not stay in the Primary Key Settlements or in the three hub areas, the study went on to consider the towns and locations that people intend to visit whilst on holiday. Whilst this shows that a large proportion of people do tend to visit some of the main settlements, it nevertheless still highlights a much greater role for non-hub centres and again underlines the importance of the Coastal

Corridor as the main focus for tourist activity. A summary of the key locations that tourists visit is set out below. The way in which the survey findings were recorded is such that the columns are not intended to add to 100% (as people would tend to visit more than one place whilst on holiday) and it should also be noted that the survey again tends to under-estimate the relative importance of locations within West Carmarthenshire.

Area	Settlement	% People Visiting
Coastal Corridor from Laugharne to Tenby	Tenby	47
	Saundersfoot	23
	Laugharne	4
	Pendine	4
	Amroth	2
	Freshwater East	2
	Penally	1
	St Florence	1
St David's Area (St Davids, Solva, Newgale, Broadhaven, Little Haven)	St Davids	35
	Newgale	12
	Solva	5
	Broadhaven	3
	Little Haven	1
Haven Towns Hub	Haverfordwest	25

	Pembroke	20
	Milford Haven	11
	Pembroke Dock	1
Fishguard Hub	Fishguard	22
	Goodwick	1
Carmarthen Hub	Carmarthen	8
Other	Newport	15
	Narberth	13

Source: Pembrokeshire Visitor Survey Report 2007/2008

Table 25 Areas Visited by Tourists

6.15 It is not surprising that holidaymakers would tend to visit a wider range of towns whilst in the local area. It is also not surprising that many people would wish to visit some of the large settlements which offer a range of attractions and retail facilities that would serve their needs. However, this evidence is particularly powerful in once again underlining the particular importance of the coastal areas – in particular, the Coastal Corridor – as a component of the local tourism economy. The importance of this area and the particular dominance of Tenby and Saundersfoot is such that consideration must be given to the ways in which other centres complement this key concentration of tourism activity and how future enhancements to the local tourism offer should build upon this existing dominant role.

Understanding of relationships

6.16 The evidence relating to the places in which tourists stay and visit set out above shows how the Primary Key Settlements are less attractive to visitors than some of the smaller coastal settlements. This is an important conclusion which will have implications upon future policy initiatives that seek to promote the tourism industry in the Pembrokeshire – The Haven Spatial Plan Area. In setting objectives for the future, it is important to understand why the patterns of activity that have been identified have happened and whether a change in direction should be encouraged.

6.17 The Pembrokeshire Visitor Survey considered the key factors that visitors found to be central to the enjoyment of holiday locations in general and the extent to which these factors were met in the local area. Although this evidence is only shown for Pembrokeshire, it is considered that the general conclusions would be equally applicable to the Spatial Plan Area as a whole.

6.18 The table below shows a comparison between the five factors that respondents found to be most important to the enjoyment of their holiday and the five factors that they consider to be best provided within Pembrokeshire:

Importance	Pembrokeshire Performance
Beaches	Beaches
Natural attractions	Opportunities for walking
Opportunities for walking	Natural attractions
Eating out	Cultural, heritage and historical sites
Outdoor activities	Outdoor activities

Source: Pembrokeshire Visitor Survey Report 2007/2008

Table 26 Key factors considered to be important to holidaymakers

6.19 This evidence shows that people are attracted to the Spatial Plan Area by the quality of the coastline, the beaches and the natural environment, rather than for features or facilities that would normally be found within the main settlements. Whilst it has been seen that visitors to the area do visit the main settlements for a variety of reasons, it is apparent that these are not the primary draws to the Spatial Plan Area for them. For this reason, the key focus for the on-going promotion and enhancement of the area should be upon those locations and attractions that are best able to meet the needs and aspirations of holidaymakers. As has been shown, the most important area for tourism – and hence, the most important focus for on-going promotion and investment – is the Coastal Corridor. This is recognised by the Wales Spatial Plan as an important centre of coastal activity and as a zone of regional connectivity. The challenge in the future will be to ensure that it can maintain this role and to allow all other areas (including the Primary Key Settlements and the hubs) to be increasingly complementary in terms of their ability to serve this main 'tourism hub'.

Accommodation

6.20 The STEAM report shows that over 55% of visitors to Pembrokeshire in 2007 stayed for more than one night and, of this total, over 90% stayed in either serviced or non-serviced accommodation. In the light of this, an understanding of the relative role of different settlements within the Spatial Plan Area can be further understood by appraising the location of holiday accommodation. The location of accommodation both influences and is influenced by demand from tourists – people will require accommodation in areas that they most wish to stay whilst the availability of appropriate accommodation will be a factor in shaping holiday decisions. We consider below the distribution of bed spaces and second homes across the Spatial Plan Area. This again shows the dominance of the Coastal Corridor and Tenby and Saundersfoot in particular as the main location for tourism within the Spatial Plan Area.

Bed Spaces

6.21 A bedspace survey was prepared for the South West Wales Tourism Partnership in 2002. This showed that there were 144,563 bed spaces available within South West Wales, of which 65% were in Pembrokeshire, 20% were in Swansea and 14% were in Carmarthenshire. Although this evidence is now relatively dated, we have been advised by the South West Wales Tourism Partnership that it can still be used as a broad guideline of provision and that the level of accommodation suggested by the report is unlikely to have increased or decreased by more than 5%.

6.22 The bedspace survey showed the postcode areas within which the largest number of bedspaces were concentrated, several of which are within the Pembrokeshire Haven Spatial Plan Area:

Postcode area	Settlements included within Postcode area	Number of Bedspaces
SA70 7	Tenby	13,640
SA62 6	St Davids	13,170
SA33 4	Pendine, Laugharne, St Clears	4,660

Source: South West Wales Bedspace Survey 2002

Table 27 Distribution of bedspaces by postcode area

6.23 The report notes that the SA70 7 postcode area is relatively small, suggesting a high concentration of bedspaces. By contrast, the SA62 6 area covers a much larger area and therefore has a lower concentration of bedspaces, even though this evidence (and that presented elsewhere in this chapter) shows that it is an important tourist location.

6.24 In terms of specific types of accommodation, the survey showed that:

a These two postcode areas also contained the highest number of bedspaces in the holiday parks sector (SA70 7: 10,230 and SA62 6: 9,540);

b SA70 7 had double the number of serviced bedspaces compared to other postcode areas (2,000 in SA70 7, compared to 1,000 in the adjoining SA70 8 (Tenby and Saundersfoot) and 920 in SA62 6); and,

c SA62 6 had the highest number of self-catering bedspaces (2,700), followed by SA62 3 (a large area including Dale and Broad Haven) which had 2,485 bedspaces.

6.25 Within the Carmarthenshire part of the Spatial Plan Area, the survey showed that the small SA33 4 area accounted for almost a quarter of all bedspaces in Carmarthenshire and nearly three times the next highest number of bedspaces (which is in the area around Bury Port and Pembrey – outside of the Spatial Plan Area).

6.26 In terms of specific types of accommodation, the survey showed that:

a SA33 4 contained the highest number of bedspaces in the holiday parks sector (3,930);

b SA31 3 (part of Carmarthen) contained the highest number of serviced accommodation bedspaces (570) although this is shown to be due to a large concentration of spaces at Trinity College. SA33 4 contained the second highest concentration of serviced accommodation bedspaces (325); and,

c SA33 5 (between St Clears and Carmarthen) contained the highest number of self-catering bedspaces (1,000), although this is again due to a single large accommodation provider. SA33 4 contained the second highest concentration of self-catering accommodation bedspaces (400).

6.27 Although this information is relatively dated, it nevertheless supports a number of important emerging trends, relating to the particular dominance of Tenby and the wider Coastal Corridor as the primary tourism centre. Set against this, it is telling that no reference was made to any of the Haven Town settlements in the report – again highlighting the comparatively limited role of tourism in these centres. Whilst the distribution of bedspaces in the Carmarthenshire part of the Spatial Plan Area is more complex, it is again dominated by the southern coastal areas.

6.28 However, it is noteworthy that the Pembrokeshire Coastal National Park LDP preferred strategy suggests that Tenby has recently suffered some decrease in hotel accommodation due to a decline in tourist numbers and a strong property market leading to conversion of hotels. Indeed, the vision for 2021 suggests that both Tenby and Saundersfoot require additional tourist accommodation if they are to continue to fulfil their potential as tourist destinations.

Second Homes

6.29 A further understanding of the relative importance of different areas as tourism locations can be achieved through an analysis of second residence / holiday home ownership. This information is derived from the 2001 census and is therefore now somewhat outdated, although it is helpful in supporting the other evidence that has been discussed in this chapter.

6.30 According to the 2001 census, 3,400 dwellings were unoccupied as they were second/holiday homes within the Spatial Plan Area. This equated to 5.1% of the total dwelling stock at that time. Of this total, over 40% of second homes were located within the Coastal Corridor and 17% of the total were concentrated into Tenby and Saundersfoot. The dominance of second homes as a component of the dwelling stock in this area is shown from the fact that almost 12.5% of the all dwellings in the Coastal Corridor and more than 13.5% in Tenby and Saundersfoot were second homes.

6.31 By contrast, the number of second homes in the Hub settlements was substantially lower:

	Settlement	No. of Second Homes	% of total dwellings	Hub Total
Haven Towns	Haverfordwest	19	0.39	159 (0.73%)
	Milford Haven	34	0.6	
	Neyland	33	1.8	
	Pembroke	49	1.5	
	Pembroke Dock	18	0.5	
Fishguard	Fishguard	71	4.4	109 (4.4%)
	Goodwick	38	4.4	
Carmarthen	Carmarthen	15	0.2	15 (0.2%)

Source: ONS 2001 Census

Table 28 Number of Second Homes in Hub Settlements

6.32 A clear conclusion can therefore be drawn that the main settlements within each of the hubs do not serve a particularly important role as providers of tourism accommodation. This can be attributed to their character and to the nature of the local tourism product within the Pembrokeshire Haven Spatial Plan Area which, whilst being very successful in attracting visitors to the area, has also resulted in a particular concentration of activity into core coastal areas and has thereby shaped the importance of the Coastal Corridor as the primary focus for tourist activities.

Visitor Attractions

6.33 An important element of tourist trips is visits to local facilities and attractions. Whilst some people will visit the retail and leisure facilities that are considered elsewhere in this report and many people will visit beaches or take part in outdoors recreation, a large number will visit formal tourist attractions. An understanding of the distribution and popularity of different attractions is important in further highlighting the relative importance of different settlements within the Spatial Plan Area from a tourism perspective. It has not been possible to identify every tourist attraction and, as has been noted, a major local attraction is the coastline and countryside, for which no formal data is available. However, a review of 2007 Visits to Tourist Attractions report which was prepared for Visit Wales is helpful in providing a broad overview of the main attractions within the Spatial Plan Area.

6.34 The purpose of the Visit Wales research was to monitor trends in the tourist attraction sector in Wales in order to provide a greater understanding of the sector to both industry and public sector organizations. It was therefore not specifically intended to identify all tourist attractions throughout Wales. The research included 519 attractions, of which 304 responded to the survey. A total of 60 attractions in South West Wales were included in the study, of which 29 are located within the Pembrokeshire Haven Spatial Plan Area. These attractions welcomed 1.25 million visitors in 2007. The survey results exclude a number of important facilities, such as Bluestone (which has opened since the survey took place) and Folly Farm. As such, it can only be relied upon to provide a snap-shot of visitor levels to a range of facilities within the Spatial Plan Area rather than offering a comprehensive overview of all visitor attractions.

6.35 A summary of the attractions and the number of visitors that they attracted in 2007 is set out below:

Hub	Settlement	Attraction	No. Visitors (2007)
Haven Towns	Haverfordwest	Melin Tregwynt	25,000
	Haverfordwest	Nant-y-Coy Arts	22,141
	Haverfordwest	Picton Castle & Woodland Gardens	19,000
	Pembroke	Pembroke Castle	82,403
	Pembroke	Pembroke Candle Centre & Museum	8,500
	Pembroke	Lampheys Bishop's Palace	2,231
			161,282
Carmarthen	Carmarthen	Gwili Steam Railway	26,000
	Carmarthen	Oriel Myrddin Gallery	23,011
	Abergwili	Carmarthenshire County Museum	13,837
	Abergwili	Museum of Speed	30,759
			93,607
Coastal	Tenby	Tenby Museum & Art Gallery	14,308

Corridor	Tenby	Tudor Merchant's House	17,633
	Tenby	Silent World Aquarium & Reptile Collection	16,000
	Tenby	Ocean Lab	79,366
	Laugharne	Dylan Thomas Boathouse	35,600
	Laugharne	Laugharne Castle	10,666
			173,573
	Narberth	Colby Woodland Garden	31,199
	Narberth	Heron's Brook Animal Park	3,000
	Narberth	Oakwood	313,723
			347,922
	St Davids	St Davids Bishops Palace	23,240
	St Davids	St Davids Catherdral	269,700
	St Davids	Pembrokeshire Sheepdogs	3,060
	Solva	Solva Woolen Mill	11,000
			307,000
	Carew	Carew Castle & Tidal Mill	39,690
	Carew	Carew Cheriton Control Tower	2,000
	Crymych	Castell Henllys Iron Age Fort	27,770
	Llysyfran	Llysyfran Reservoir Country Park	94,504
	Boncath	Caws Cenarth - Welsh Cheese	4,380
	Cenarth	National Coracle Centre & Flour Mill	4,909
			173,253
Total for all attractions			**1,256,637**

Source: Visits to Tourist Attractions, 2007

Table 29 Visitor levels at key tourist attractions in Pembrokeshire Haven Spatial Plan Area

6.36 Any assessment of the total number of visitors to these attractions must take account of the fact that 46% of all visits were to the largest two attractions for which data was recorded by the study – Oakwood (near Narberth) and St Davids Cathedral. Whilst visitors to Oakwood would not necessarily also visit Narberth, the popularity of St Davids Cathedral is very important in boosting the overall number of visitors to the City.

6.37 Although this evidence shows that there is a reasonable distribution of tourist attractions throughout the Spatial Plan Area – including in the Haven Towns Hub and the Carmarthen Hub, it is also important in highlighting once again the extent to which these key locations do not dominate tourism activities within the Pembrokeshire Haven area, either in terms of the number of attractions that are available or the number of people that visited them in 2007. Importantly, fewer people visited those attractions that were reported in the survey in Haverfordwest, Pembroke and Carmarthen than visited attractions in Tenby, Narberth, St Davids and (cumulatively) the smaller local centres and other settlements that are not identified by the Wales Spatial Plan. Similarly, fewer people visited attractions in the Haven Towns Hub and the Carmarthen Hub than visited attractions in the Coastal Corridor. The recent opening of Bluestone near Narberth serves to further increase its important role as a centre of tourist activity and its greater significance than the main hub settlements.

6.38 Although it is recognised that this evidence does not provide a comprehensive picture of tourism trends and the availability of tourist attractions within the Spatial Plan Area, it further emphasises the evidence that is set out elsewhere in this chapter regarding the relative importance of the non-Hub settlements as tourist centres and the extent to which policies regarding the development of the local tourist economy should build around an understanding of their role importance and the extent to which this might be complemented by the larger settlements.

Tourism Employment

6.39 As a final element of our analysis of tourism within the Pembrokeshire Haven Spatial Plan Area, consideration can be given to the distribution of tourist-related employment across the area. This supplements our review of the distribution of all employment types in chapter 5 by undertaking a more detailed analysis of the following specific tourism-related activities:

a Serviced and non-serviced accommodation;

b Restaurants and bars;

c Museums, sporting and other recreational activities; and,

d Travel agencies.

6.40 According to our analysis of Annual Business Inquiry Workplace Analysis Data, approximately 7,500 people were employed in these tourism sectors in the Pembrokeshire Haven Spatial Plan Area in 2007. The distribution of employment by location is detailed below:

Hub	Settlement	No. Jobs
Haven Towns	Haverfordwest	600
	Milford Haven	300
	Neyland	100
	Pembroke	200
	Pembroke Dock	500
	Johnston	<100
Fishguard	Fishguard	200
	Goodwick	<100
Carmarthen	Carmarthen	600
Coastal Corridor	Tenby	1,000
	Saundersfoot	300
	Rest of Coastal Area	1,200
Other	St Davids	600
	Narberth	200
	Newcastle Emlyn	200
	St Clears	100

Table 30 Distribution of Tourism Employment in Spatial Plan Area

6.41 One third of all tourism related employment in the Spatial Plan Area is concentrated in the Coastal Corridor, with 40% of this employment being within

Tenby alone and more than 50% in Tenby and Saundersfoot. This again highlights the extent to which the Coastal Corridor and the two main towns of Tenby and Saundersfoot (which are shown by the Wales Spatial Plan to be linked settlements) dominate the tourism sector within the Spatial Plan Area.

6.42 Although we have shown that the Haven Towns Hub is the key employment location within the Spatial Plan Area, this evidence shows the extent to which it is overshadowed as a location of tourism employment by other centres. Tenby and Saundersfoot alone provide 70% as many jobs as all of the Haven Town settlements whilst Tenby provides 1.5 as many tourism jobs as both Haverfordwest and Carmathen.

6.43 In addition to showing the importance of the Coastal Corridor as a tourism location, particularly when compared to the hub settlements, this evidence also indicates the complementary importance of other settlements. In particular, St Davids provides a large number of tourism jobs – a figure that reflects the statistics relating to visitor levels and accommodation provision – whilst the smaller centres of Narberth, Newcastle Emlyn and St Clears all have some (albeit limited) tourism employment. In considering the figures for Narberth, it should be noted that one of the town’s key tourism offers relates to its specialist retail provision which would not be reflected in these figures. In this respect, it has considerable potential to complement the tourism offer of the coastal settlements by providing an interesting alternative destination for visitors. The Pembrokeshire Visitor Survey shows that 13% of respondents stated that they indented to visit Narberth whilst on holiday, thereby highlighting that this complementary role is already being fulfilled. In the future, consideration must be given to the ways in which this and other complementary relationships might be improved so that the overall attractiveness of the Spatial Plan Area to visitors might be enhanced.

Complementary within the Spatial Plan Area

6.44 The One Wales agreement between Labour and Plaid Cymru of June 2007 recognised the importance of tourism as a contributor to economic prosperity and job creation in many parts of Wales. It stated that tourism should therefore be developed across Wales on a Regional basis in order to make the most of local resources and assets. To this end and in view of the character of the Pembrokeshire Haven Spatial Plan Area and the nature of the existing tourism offer, the Wales Spatial Plan states that there is potential to further develop tourism linked to the environment, coast, culture and heritage and to extend the tourist season. It specifically identifies an aspiration to establish a plan to identify tourism opportunities to address under-utilised assets, increase visitor expenditure and extend the tourist season. Given the existing popularity of the Pembrokeshire – The Haven Spatial Plan Area as a tourist destination, the achievement of this aspiration will primarily depend upon the continued development of the current strengths of the area and so that it might be able to better serve the needs of visitors to the area and might thereby be able to attract an increasing number and range of tourists throughout the year.

6.45 All of the evidence contained within this chapter points towards and underlines a very clear understanding of the dominance of the Coastal Corridor as the primary focus of tourist activity. It has been shown to be the main location in terms of visitor numbers, the supply of accommodation and the level of employment jobs and also a very important location in terms of the number of visitors to key facilities. However, as has been shown, the primary reason for the attractiveness of this area echoes that of the attractiveness of the Spatial Plan Area as a whole and relates to the quality of its coastline and countryside and the opportunities that exist for walking and other outdoors activities. Within the Coastal Corridor, the connected settlements of Tenby and Saundersfoot represent the most important tourist locations. Despite both being relatively small in size (Tenby is identified by the Wales Spatial Plan as a Key Settlement whilst Saundersfoot is a Local Centre), these centres effectively serve as a tourism hub and their role is complemented by that of other, smaller centres within the Coastal Corridor and other centres elsewhere within the Spatial Plan Area. This role is to be maintained and encouraged in the future but it should not be viewed as the only tourism centre within the Spatial Plan Area. Rather, it will be important to enhance the overall tourism product in order to attract visitors to other centres and to encourage more year-round and higher value tourism. This will involve recognising the substantial opportunities that exist in other parts of the Spatial Plan Area, something that has already started, for example, in St Davids and Narberth and also, at a smaller scale within the rural parts of the area where the tourism product has been built upon an appreciation of the environmental assets and the opportunities for more outdoor activities.

6.46 This approach creates significant opportunities for small settlements and rural areas to complement the main resorts. Whilst the main settlements might be viewed rather more as serving the local population rather than tourists, they do have an important role to play which should be encouraged through the development of:

a Leisure facilities;

b Marinas – to serve those accessing the area by boat and also to take the advantage of the coastal assets to enhance the appeal and viability of the main centres as visitor destinations;

c Retail facilities;

d Food and drink facilities – a range of different facilities will be required to serve the varying needs of different visitors;

e Accommodation;

f Museums and other specific visitor facilities;

g Existing heritage opportunities; and,

h The gateway location of the main centres – taking advantage of the various opportunities that are associated with the (passenger) port function of

Pembroke Dock and Fishguard and encouraging people to stay locally rather than merely using the ports as an entry and exit point.

6.47 It is therefore important to recognise the opportunities that are presented by the main settlements, albeit within the context of an appreciation that people would tend not to visit the area for the towns but are more likely to be attracted by the quality of the natural environment, the countryside and the coastline. However, regardless of the main purpose of their visit, holidaymakers should be encouraged to visit the main towns. In this regard, the main settlements should be viewed as complementary to the wider tourism offer within the Spatial Plan Area. At present, this complementary role is not being adequately served and so further action should be taken as a priority. This will necessitate a consideration of the range and type facilities that are made available, the quality of the main settlements, their appeal to visitors, and the extent to which the key centres are marketed to holidaymakers.

7.0 # Retail

Introduction

7.1 In many respects retail is a cross-cutting issue with implications on other key matters such as employment, sustainability and tourism. It is therefore considered that the retail offer within the Spatial Plan Area has the potential to act as both a barrier and facilitator to complementarity. As such it is important to understand the current shopping patterns of local residents within the Pembrokeshire – The Haven Spatial Plan Area in order to determine how this reflects the existing retail hierarchy and most importantly whether the existing roles of the hubs and settlements are complementary. In this chapter we consider the following:

a The retail hierarchy of each of the Local Authority areas;

b The existing convenience and comparison shopping patterns within the Spatial Plan Area;

c The health of each of the hub settlements in retail terms;

d Any retail allocations, commitments or proposals within the Spatial Plan Area; and,

e The identification of the areas most likely to see demand for growth.

The Retail Hierarchy

7.2 The retail hierarchy of the Spatial Plan Area is difficult to define due to the fact that the area encompasses three local authority areas, each of which use different terminology and assessment methods. However, a summary of the hierarchy for each of the local authority areas as defined by the relevant development plan documents is set out below.

Carmarthenshire County Council

7.3 Carmarthenshire's retail hierarchy is defined within the Council's Unitary Development Plan (adopted July 2006). The hierarchy is identified in terms of 'growth areas' as follows:

a **Growth Area:** Carmarthen including Abergwili, Johnstown, Llangunnor, Llanllwch and Trevaughan.

b **Secondary Settlements:** Newcastle Emlyn, St Clears and Whitland.

c **Tertiary Settlements:** Laugharne / Broadway.

d **Village Clusters:** Cluster 1-4, Cluster 5 (Whitland), Cluster 6 (Newcastle Emlyn), Cluster 7 (Capel Iwan), Cluster 8 (Trelech), Cluster 9-10, Cluster 11 (St Clears), Cluster 12 (Laugharne), Cluster 13 (inc Pendine), Cluster 14-15 and Cluster 17 (Carmarthen).

Pembrokeshire County Council

7.4 Pembrokeshire Council's retail hierarchy is defined within the Local Development Plan (LDP) Pre-Deposit Preferred Strategy (March 2009) as follows:

a **Town Centres:** Haverfordwest, Milford Haven, Pembroke, Pembroke Dock, Fishguard and Narberth.

b **Local Retail Centre:** Neyland, Goodwick, Crymych, Johnston, Kilgetty, Begelly and Letterston.

Pembrokeshire Coast National Park Authority

7.5 PCNPA's retail hierarchy is defined in the Deposit Local Development Plan as follows:

a **Town Centre:** Tenby.

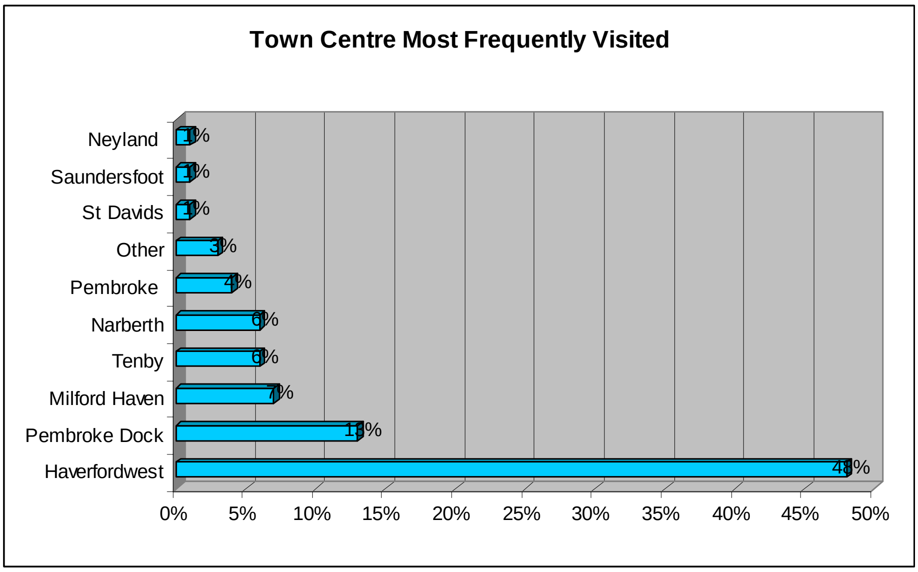
b **District centres:** Newport, St Davids and Saundersfoot.

c **Other smaller retail centres** e.g. Solva.

7.6 By their very nature, the retail hierarchies demonstrate that each of the centres have a different role and function from those in the tiers above or below. However, looking at the hierarchies from the context of complementarity it becomes important to ensure that those centres are performing an appropriate role at each level and are interacting with each other in a complementary way.

7.7 In addition to the Local Authority retail hierarchies, the Pembrokeshire Resident's Survey 2007 asked a series of questions relating to the day to day habits of residents. One question asked which town centre was most frequently visited:

7.8



Source: Pembrokeshire Resident's Survey 2007

Fig 39 Town Centre Most Frequently Visited

7.9 Whilst this clearly only relates to Pembrokeshire, it is useful to see the popularity of Haverfordwest within this part of the Spatial Plan Area. It is also interesting to see that despite its position in the retail hierarchy as a town centre, and its definition by the Wales Spatial Plan as a Key (and hub) Settlement, Fishguard does not feature on this table, highlighting its very limited role as a retail destination.

7.10 In addition, Management Horizons Retail UK Shopping Index (2008) provides a rank of over 6,500 retail centres within the UK. This provides a different perspective on the rank of centres in terms of their retail offer. The table below shows all of the centres within the Spatial Plan Area which have been ranked as well as the major centres surrounding the area.

Centre	Tier	MHE 2008 Retail Rank	MHE 2008 Retail Score
Cardiff	n/a	21	348
Swansea	n/a	93	212
Carmarthen	1	207	136
Haverfordwest	1	350	92
Cardigan	n/a	874	41
Pembroke Dock	1	1175	31
Tenby	2	1175	31
Withybush Retail Park	n/a	1420	25
Havens Head Business Park	n/a	2046	16
Milford Haven	1	2247	14
Fishguard	2	2988	9
Pembroke	1	3120	8
Newcastle Emlyn	3	3120	8
Johnstown	n/a	3120	8
Neyland	1	3870	5
Narberth	2	4226	4
Whitland	2	4226	4
Kilgetty	3	4226	4
St Clears	2	4666	3
Letterston	3	5257	2
Pendine	3	5257	2
St Davids	3	5257	2
Saundersfoot	3	5720	1

Source: Management Horizons, 2008

Table 31 Retail Rankings

7.11 This indicates that Carmarthen is the main retail destination within the Spatial Plan Area followed relatively closely by Haverfordwest. Both of these centres are ranked substantially higher than Cardigan. Despite being a smaller settlement than Milford Haven, Pembroke Dock is identified by Management Horizons as the third retail centre within the Spatial Plan Area. Of the Tier 1 settlements, Pembroke and Neyland are the worst performers with Tier 2 settlements of Tenby and Fishguard ranking higher. The performance of the town out of centre retail parks of Withybush and Haven's Head is also an important consideration in terms of complementarity as they serve to enhance the relative importance and attractiveness of Haverfordwest and Milford Haven and their ability to serve the needs of the local population and those living in the wider area. It is noteworthy that, despite being identified by the Wales Spatial Plan as a Key Settlement as part of the Fishguard Hub, Goodwick is not included in the Management Horizons data. As such, it is the only Key Settlement within the Spatial Plan Area not to be included and one of only four settlements identified by the Wales Spatial Plan that has not been considered by Management Horizons (the others being Newport, Crymych and Laugharne). This serves to highlight its limited role in serving the local area and its limited ability to complement the retail function of other settlements in the Spatial Plan Area.

Existing Shopping Patterns

7.12 The analysis of the role of each settlement as a retail centre has been augmented by undertaking an assessment of the existing shopping patterns in order to establish what people are shopping for and where they are travelling to undertake this type of shopping.

7.13 This has been informed by the results of two separate household telephone survey's for both Carmarthenshire (December 2008) and Pembrokeshire (January 2006). The study areas for these two surveys are provided in Appendix 4 which also contains a list of the relevant postcodes for each settlement.

Limitations of the Data

7.14 The data relating to existing shopping patterns for both convenience and comparison goods within Pembrokeshire has a number of limitations. An up-to-date household survey on existing shopping patterns was not available for Pembrokeshire and so a number of different sources were used to inform this data:

a The main source was an existing household survey undertaken by Tesco in 2006. However, this survey did not include all centres within Pembrokeshire.

b The second data set was survey data from the National Survey of Local Shopping Patterns (NSLSP) provided by PCC. However, this related to main food shopping only.

7.15 Where no data was available, NLP has estimated the likely shopping patterns based on the shopping patterns of nearby centres and local knowledge in terms of transport routes. The specific sources used for each centre is specified in below. The implication of this is that caution should be taken regarding any recommendations made in this section of the report without additional survey work being undertaken in order to robustly analyse retail need within Pembrokeshire.

7.16 The survey data for Carmarthenshire came from a household survey undertaken by NEMS market research in December 2008 as part of an update to the Council's Retail Study (2009). This data is therefore considered to be robust for both convenience and comparison goods shopping patterns.

7.17 It should be noted that the figures provided are percentages derived from a questionnaire asking where people undertook both food and non-food shopping. As such, a high percentage in a small centre may still represent a relatively small amount of retail activity.

Convenience Shopping

7.18 In terms of food shopping (both main and top-up), the most popular shopping destinations for each of the key settlements within each of the hubs area as follows:

The Haven Towns Hub

a **Haverfordwest:** Tesco at Haverfordwest attracted the majority of expenditure at 55% followed by Morrisons at Haverfordwest (29%) and other local shops in Haverfordwest (13%).

b **Milford Haven:** Tesco at Milford Haven attracted the majority of convenience expenditure at 56% followed by Kwik Save at Milford Haven (11%), Somerfield in Milford Haven (9.5%), Lidl at Milford Haven (7%) and the Morrisons and Tesco stores at Haverfordwest (6% each).

c **Pembroke:** Data on shopping patterns was unavailable for Pembroke. However, using National Survey of Local Shopping Patterns (NSLSP) data it is possible to estimate that 76% of expenditure goes to Pembroke Dock, 12% is retained in Pembroke and 12% goes to the foodstores in Haverfordwest.

d **Pembroke Dock:** Data on shopping patterns was unavailable for Pembroke Dock. However, using NSLSP has allowed an estimate that 96% of convenience expenditure is attracted to the food stores in Pembroke Dock (mainly Tesco), 2% to the Somerfield in Pembroke and 1.5% to the larger stores in Haverfordwest.

e **Neyland:** The most popular food shopping destination for Neyland residents was Tesco at Milford Haven (23%), Tesco at Haverfordwest (20%), Tesco at Pembroke Dock (13%), Morrisons at Haverfordwest (13%), Kwik Save at Milford Haven (8%). The Spar at Neyalnd attracted just 7% of expenditure.

f **Johnston:** The most popular food shopping destination for Johnston residents was Tesco in Haverfordwest (55%) followed by Morrisons in Haverfordwest (16%), Other Haverfordwest shops (9%) and Tesco In Milford Haven (7%). Johnston shops accounted for approximately 3% of expenditure.

7.19 The majority of food shopping by the Haven town residents occurs within the hub area. However, it should be noted that the Kwik Save at Milford Haven has now closed although given existing provision this is unlikely to significantly impact upon expenditure patterns. Overall, the settlements appear to complement each other with distances between homes and foodstores relatively short although the spending patterns do point towards a relatively limited level of expenditure flow over the Cleddau Bridge. Whilst this is considered to be primarily a function of the distribution of convenience retail facilities it might also be a result of the toll bridge which could dissuade people from crossing the Haven Waterway for convenience retail purposes.

Fishguard & Goodwick Hub

a **Fishguard and Goodwick:** The main food shopping destination for Fishguard and Goodwick residents was the Kwik Save in Fishguard (now understood to be Somerfield/Co-op) which attracted 35% of expenditure. This was followed by the Tesco in Haverfordwest (32%), the Morrisons in Haverfordwest (14%) and other local shops attracting a further 15%.

7.20 The Fishguard and Goodwick hub does not provide residents with sufficient choice in terms of convenience shopping destinations and consequently a very large proportion of residents are travelling to larger foodstores located within the Haven Towns hub.

Carmarthenshire Hub

a **Carmarthen:** Tesco Extra in Carmarthen is the main convenience shopping destination attracting 41% of respondents, followed by Morrisons at Parc Pensarn attracting 24%, Lidl in Carmarthen at 8%, M&S in Carmarthen at 7% and other local shops attracting a further 13% of expenditure.

7.21 As a hub, Carmarthen is relatively self-contained in terms of convenience shopping with the majority of expenditure retained within the hub.

The Other Key Settlements

a **Laugharne/Pendine/St Clears/Whitland:** These four settlements are located within a relatively close area to the south-west of Carmarthen. The main food shopping destination for the area was Tesco Extra in Carmarthen attracting 41% of expenditure followed by Morrisons at Parc Pensarn (21%), Co-op in Whitland (12%) and Spar in St Clears (7%). This area appears to function well with a choice of large food stores in Carmarthen complimented by a number of smaller local stores.

b **Newcastle Emlyn:** The majority of Newcastle Emlyn residents currently undertake their food shopping in Tesco Extra in Carmarthen (20%) and Morrisons at Parc Pensarn (16%). However, much expenditure is retained within Newcastle Emlyn itself with CK supermarket attracting 15%, Somerfield 13% and other local shops attracting 10%. Newcastle Emlyn's smaller foodstores therefore appear complimentary to the larger stores located within Carmarthen.

c **Narberth:** Narberth is located west of Carmarthen and east of Haverfordwest. The majority of residents actually undertake their main food shopping within Narberth itself (39%) followed by Tesco (36%) and Morrisons (12%) in Haverfordwest. Narberth residents appear able to access the large foodstores at Haverfordwest if necessary but the centre also provides plenty of opportunity for convenience shopping to meet local need.

d **St Davids:** The majority of St Davids residents undertake their food shopping at Tesco (36%) and Morrisons (32%) in Haverfordwest. These larger stores are further complimented by the local CK supermarket (11%) and other local shops within St Davids (10%).

e **Letterston:** Letterson is located south of Fishguard and Goodwick with strong road links to this hub as well to Haverfordwest. The majority of Letterson residents undertake their food shopping at Tesco (42%) and Morrisons (25%) in Haverfordwest followed by Kwik Save (now Co-op/Somerfield) in Fishguard (16%), other Haverfordwest shops (9%) and local shops in Letterson (6%). Despite Fishguard and Goodwick being closer, residents are choosing to travel further to Haverfordwest. This could be largely due to linked trips but is likely to be attributable to poor shopping choices in the north.

f **Tenby:** Actual shopping pattern data is unavailable for Tenby. However, using NSLSP data it can be estimated that 42% of expenditure goes to Pembroke Dock, 35% to Tenby, 13% to Haverfordwest, 8% to Kilgetty and 2% to Carmarthen.

g **Saundersfoot:** Actual shopping pattern data is unavailable for Saundersfoot. However, using NSLSP data it can be estimated that 42% of expenditure goes to Pembroke Dock, 35% to Tenby, 13% to Haverfordwest, 8% to Kilgetty and 2% to Carmarthen.

h **Kilgetty:** Actual shopping pattern data is unavailable for Kilgetty. However, using NSLSP data it can be estimated that 67% of expenditure goes to Pembroke Dock and 33% goes to Haverfordwest.

i **Crymych:** Actual shopping pattern data is unavailable for Crymych. However, using NSLSP data it can be estimated that 50% of convenience expenditure goes to Tesco in Cardigan, 20% to Haverfordwest, 10% to Carmarthen, 10% to Narberth and a further 5% to Newcastle Emlyn and Crymych.

j **Newport:** Actual shopping pattern data is unavailable for Newport. However, using NSLSP data it can be estimated that 30% of expenditure goes to Haverfordwest, 30% to Fishguard, 25% to Tesco in Cardigan and 15% retained in Newport.

7.22 The table below provides a summary of expenditure by hub:

Hubs	Settlements	Carmarthen Hub	Haven Towns Hub					Fishguard & Goodwick Hub	Within Spatial Plan Area												Key Centres Outside Spatial Plan Area	
		Carmarthen	Haverfordwest	Milford Haven	Neyland	Pembroke	Pembroke Dock	Fishguard & Goodwick	St Clears	Newcastle Emlyn	Narberth	Saundersfoot	Newport	Tenby	Whitland	Kilgetty	Crymych	Letterston	Johnston	St Davids	Cardigan	Other Centres
Carmarthen Hub	Carmarthen *(a)*	91.5%							0.3%						0.6%							7.6%
Haven Towns Hub	Haverfordwest *(b)*	0.9%	96.7%				1.6%	0.2%			0.4%				0.2%							
	Milford Haven *(b)*	0.7%	13.1%	85.1%	0.4%		0.3%								0.4%							
	Pembroke *(c)*		12.1%			12.1%	75.8%															
	Pembroke Dock *(c)*		1.5%			2.4%	96.2%															
	Neyland *(b)*		35.1%	37.6%	11.2%		16.2%															
Fishguard & Goodwick Hub	Fishguard & Goodwick *(b)*	0.7%	49.5%	0.4%				49.4%														
Other Settlements	Narberth *(b)*	4.0%	50.8%				1.7%				39.5%			0.6%	1.1%	2.3%						
	St Clears/ Whitland/ Pendine/ Laugharne *(a)*	70.6%							8.7%						14.1%	0.4%						6.2%
	Tenby *(c)*	2.0%	12.8%				42.0%							35.4%		7.8%						
	Crymych *(d)*	10.0%	20.0%							5.0%	10.0%						5.0%				50.0%	
	Kilgetty *(c)*		33.4%				66.6%															
	Johnston *(b)*		80.1%	14.3%			2.3%				0.5%								2.9%			
	Letterston *(b)*		76.2%				0.6%	16.9%										6.2%				
	Newcastle Emlyn *(a)*	42.3%							0.3%	38.3%												19.1%
	Newport *(d)*		30.0%					30.0%					15.0%								25.0%	
	Saundersfoot *(c)*	2.0%	12.8%				42.0%							35.4%		7.8%						
	St Davids *(b)*		77.2%			0.5%		0.9%								0.5%				21.0%		

Sources:
a) NLP Draft Carmarthenshire Retail Study Update 2009
b) Pembrokeshire Household Survey Data (2006)
c) NLP estimate based on National Survey of Local Shopping Patterns
d) NLP estimate

Table 32 Convenience Retail Expenditure by Hub

Comparison Shopping Patterns

7.23 Generally, people are willing to travel greater distances to undertake comparison shopping than they are convenience shopping. This study, informed by Pembrokeshire and Carmarthenshire Council's household surveys, has broken down comparison shopping into five categories:

a clothing and footwear,

b electricals, books, toys, stationary, CDs and DVDs,

c health and beauty and furniture where data is available.

7.24 For the centres where this data is not available, a totalled estimate for comparison shopping has been calculated.

7.25 The most popular shopping destinations for each settlement by type of comparison goods is provided in full in Appendix 4 although a summary is provided below:

The Havens Town Hub

a **Haverfordwest:** Haverfordwest residents undertake the majority of their comparison shopping with Haverfordwest town centre with it proving the most popular destination for all types of goods (53.4%). This was followed by Tesco in Haverfordwest (12.8%) which was mainly used for the purchase of health, beauty and chemist products as well as books, DVD's and CDs. Carmarthen town centre (10.9%) was the third most popular destination followed by Swansea City Centre (7.9%). Clothing and footwear and furniture were the comparison goods categories residents travelled the furthest distances to purchase.

b **Milford Haven:** The majority of residents undertake their comparison shopping in Haverfordwest (36.3%) followed by Milford Haven (28%), Withybush Retail Park (8.7%) and Swansea City Centre (7.6%). Residents regularly shop in Milford Haven for CDs and books and health, beauty and chemist products.

c **Neyland:** The most popular comparison shopping destination for Neyland residents was Haverfordwest (48.6%) followed by Milford Haven (12.8%), Carmarthen (7.9%) and Swansea (7.7%). Milford Haven was mainly visited for the purchase of CDs, books and health, beauty and chemist products. Neyland itself was little used, with residents only purchasing health, beauty and chemist products as well as textiles and furniture within the centre.

d **Pembroke:** Actual shopping patterns data is unavailable for Pembroke. However, using data for nearby centres it is estimated that 44% of expenditure is drawn to Haverfordwest followed by Pembroke Dock (30%) and Pembroke (15%) with the majority of the remaining expenditure going to the larger centres of Carmarthen, Swansea and Cardiff.

e **Pembroke Dock:** Actual shopping patterns data is unavailable for Pembroke. However, using data for nearby centres it is estimated that Pembroke Dock retains 45% followed by Haverfordwest (44%). The remainder of trade is thought to leak out to the larger centres of Carmarthen, Swansea and Cardiff.

f **Johnston:** The majority of Johnston residents undertake their comparison shopping in Haverfordwest (56.5%) followed by Tesco in Haverfordwest (12.2%), Carmarthen town centre (11%) and Swansea (7.3%). Johnston was not mentioned within the survey as a comparison goods shopping destination.

7.26 Although no actual data on shopping patterns is readily available for Pembroke and Pembroke Dock it would appear that Haverfordwest is clearly the most popular destination for all types of comparison shopping within the Haven Towns hub. Resident's of the hub appear to buy the majority of their health and beauty products, electricals and CDs and books within the hub although are more willing to travel greater distances to larger centres such as Swansea and Carmarthen to buy clothing, footwear and furniture items.

The Carmarthen Hub

a **Carmarthen:** The majority of the Carmarthen hub residents do their comparison shopping within Carmarthen (67.5%) followed by Swansea (12.3%) and Cardiff (4.4%). The goods most purchased within Carmarthen are smaller items such as CDs and books and health and beauty products although the centre achieves over 40% retention in every category surveyed. Swansea is a popular shopping location for clothing, footwear and furniture and Crosshands (and most likely the Leekes store) was also popular for furniture shopping.

7.27 Overall, the Carmarthen hub has a healthy retention rate for comparison goods expenditure with textiles and furniture proving the weakest category. It is considered that Carmarthen's draw as a comparison goods shopping centre is likely to increase further with the opening of the St Catherine's Walk development, particularly the proposed Debenhams. The developers estimate that the scheme will increase comparison expenditure by 24% (www.stcatherineswalk.com). On this basis, it is considered that the amount of trade drawn from the west will increase significantly with the opening of this development.

The Fishguard & Goodwick Hub

a **Fishguard & Goodwick:** Haverfordwest is the overall most popular shopping destination for residents of Fishguard and Goodwick at 50.9% followed by Fishguard (19.5%), Carmarthen (8.2%), Tesco, Haverfordwest (7.4%) and Swansea (5.9%). In terms of specific items, the majority of resident's shop in Fishguard for health and beauty products although approximately 21% of residents also buy their clothing and footwear in the town. Withybush Retail Park is a popular location for the purchase of electrical goods.

7.28 Overall, the Fishguard and Goodwick hub performs relatively poorly considering it should be acting as the main shopping location for north Pembrokeshire. The majority of residents are travelling to Haverfordwest, Carmarthen and beyond in order to meet their comparison shopping needs.

The Other Settlements

a **St Clears/Whitland/Pendine/Laugharne:** The local residents of these settlements mainly complete their comparison shopping in Carmarthen town centre (57.8%) followed by Swansea (10.1%) and Haverfordwest town centre (5%). Swansea was a relatively popular destination for clothing, footwear and furniture purchases and Crosshands (Leekes) was also popular for furniture and textiles.

b **Newcastle Emlyn:** The majority of local residents undertake their comparison shopping in Carmarthen town centre (43.2%) followed by Newcastle Emlyn (18.7%), Cardigan (10.7%) and Swansea (6.4%). Newcastle Emlyn was the most popular destination for the purchase of electrical goods as well as health and beauty products. It is relatively self sufficient and enjoys a good range of retail opportunities with further support available from the larger centres of Carmarthen and Cardigan.

c **Narberth:** The majority of Narberth residents undertake their comparison good shopping in Haverfordwest town centre (35.5%) followed by Carmarthen town centre (30.1%), Narberth (11.6%) and Tesco in Haverfordwest (9%). However, Carmarthen is the most popular destination for clothing and footwear. The town of Narberth appears to perform well as a shopping centre for local residents selling a wide range of goods. In addition, Narberth has a particularly strong representation as a niche retail centre which provides an important contribution its role as a tourism centre.

d **St Davids:** The residents of St Davids predominantly complete their comparison goods shopping in Haverfordwest town centre (60%), Carmarthen town centre (9.7%), Tesco in Haverfordwest (8.6%) and Swansea (7.9%). The majority of residents shopping in St Davids are buying health, beauty and chemist products as well as a small proportion of clothing and footwear and CDs, books and stationary.

e **Letterston:** Letterston residents undertake the majority of their comparison goods shopping in Haverfordwest town centre (62.1%) followed by Fishguard (9.4%), Cardiff (6.8%) and Carmarthen town centre (6.7%). Letterston itself was not mentioned as a comparison goods shopping destination.

f **Tenby:** No actual shopping patterns data is available for Tenby. However, based on the shopping patterns of residents in nearby centres it is estimated that approximately 35% of expenditure goes to Haverfordwest followed by Carmarthen (30%), Pembroke Dock (10%) and Tenby (10%).

g **Saundersfoot:** No actual shopping patterns data is available for Saundersfoot. However, based on the shopping patterns of nearby centres it can be estimated that 35% of expenditure goes to Haverfordwest followed by Carmarthen (30%), Pembroke Dock (10%) and Tenby (10%).

h **Kilgetty:** No actual shopping patterns data is available for Kilgetty. However, based on the shopping patterns of residents in nearby centres it has been estimated that 35% of expenditure is attracted to Haverfordwest followed by Carmarthen (28%), Pembroke Dock (10%) and Narberth (10%).

i **Crymych:** No actual shopping patterns data is available for Crymych. However, given its location it is considered that approximately 72% of expenditure is attracted to Carmarthen and Haverfordwest and 10% going to Cardigan.

j **Newport:** No actual shopping patterns data is available for Newport. However, based on the shopping patterns of residents of nearby centres it has been estimated that approximately 37% of trade goes to Haverfordwest, 25% to Carmarthen, 15% to Fishguard and Goodwick and 15% to Cardigan.

7.29 The table below shows a summary of comparison shopping between the hubs:

Hubs	Settlements	Carmarthen Hub	Haven Towns Hub					Fishguard & Goodwick Hub	Within Spatial Plan Area								Key Centres Outside Spatial Plan Area			
		Carmarthen	Haverfordwest	Milford Haven	Neyland	Pembroke	Pembroke Dock	Fishguard & Goodwick	St Clears	Newcastle Emlyn	Narberth	Tenby	Whitland	Kilgetty	Crymych	St Davids	Cardiff	Swansea	Cardigan	Other Centres
Carmarthen Hub	Carmarthen *(a)*	68.2%							0.9%	0.5%							4.4%	12.3%		13.6%
Haven Towns Hub	Haverfordwest *(b)*	11.1%	74.4%	1.1%		0.6%	0.4%	0.5%			0.5%						3.1%	7.9%	0.2%	0.3%
	Milford Haven *(b)*	6.0%	47.1%	34.6%		0.1%					0.9%						3.0%	7.6%		0.9%
	Pembroke *(c)*		44.0%			15.0%	30.0%										3.0%	8.0%		
	Pembroke Dock *(c)*		44.0%				45.0%										3.0%	8.0%		
	Neyland *(b)*	7.9%	58.0%	18.0%	1.0%		4.4%	0.4%				0.3%					1.6%	7.7%		0.7%
Fishguard & Goodwick Hub	Fishguard & Goodwick *(b)*	8.2%	62.1%	0.3%				19.5%										5.9%	3.2%	0.6%
Other Settlements	Narberth *(b)*	30.7%	48.6%	0.4%					0.2%		11.6%	1.6%	0.2%	0.8%			0.1%	4.9%		0.8%
	St Clears/ Whitland/ Pendine/ Laugharne *(a)*	63.6%	5.0%						3.9%				1.8%				4.1%	10.1%	0.5%	11.2%
	Tenby *(c)*	30.0%	35.0%	3.0%			10.0%				4.0%	10.0%					3.0%	5.0%		
	Crymych *(c)*	36.0%	36.0%					5.0%			5.0%						3.0%	5.0%	10.0%	
	Kilgetty *(c)*	28.0%	35.0%	3.0%			10.0%				10.0%	5.0%		1.0%			3.0%	5.0%		
	Johnston *(b)*	11.0%	73.2%	4.3%			0.5%										3.1%	7.3%		0.8%
	Letterston *(b)*	6.7%	70.7%					9.4%									6.8%	6.1%		0.4%
	Newcastle Emlyn *(a)*	48.1%	1.7%							21.0%							3.2%	6.4%	10.7%	8.9%
	Newport *(c)*	25.0%	37.0%					15.0%									2.0%	6.0%	15.0%	
	Saundersfoot *(c)*	30.0%	35.0%	3.0%			10.0%				4.0%	10.0%					3.0%	5.0%		
	St Davids *(b)*	9.7%	73.9%	0.8%		0.4%		1.0%								2.4%	3.6%	7.9%		0.4%

Sources:
a) NLP Draft Carmarthenshire Retail Study Update 2009
b) Pembrokeshire Household Survey Data (2006)
c) NLP Estimate

Table 33 Comparison Goods Shopping Pattern

7.30 In terms of retail activity within the Haven Towns hub, Haverfordwest can clearly be seen as the main centre. Almost 70% of comparison retail expenditure from Haverfordwest is retained within the town (with 10% being lost to Carmarthen and 9% to more distant centres – Cardiff and Swansea). It also attracts almost half of all comparison retail expenditure from Milford Haven. By contrast, only 33% of Milford Haven comparison expenditure is retained within the town (including in the retail park). In addition, 56% of the comparison retail expenditure that is generated in the Fishguard hub is spent in Haverfordwest, compared to 19% in the Fishguard hub itself and 8% in Carmarthen. The low level of expenditure loss to Carmarthen is a function of its distance from the Fishguard hub and the lack of any direct road links.

7.31 As with convenience retailing, Carmarthen is relatively well self-contained and attracts a high level of spending from elsewhere in the Spatial Plan Area. This again underlines its role as the dominant retail centre within the Spatial Plan Area – a role that will be further emphasised following the opening of the St Catherine's Walk retail development.

7.32 Whilst it should be noted that these figures are skewed by the absence of actual shopping patterns data relating to Pembroke and Pembroke Dock, they do highlight the very considerable importance of Carmarthen and Haverfordwest as dominant retail centres within the Spatial Plan Area.

Town Centre Retail Health Checks

7.33 Town centre health checks have been undertaken for all the main town centres within the Spatial Plan Area and are provided in full within Appendix 4. In terms of the implications of the health of the centres on complementarity, a summary of the key issues is provided below.

The Haven Towns Hub

7.34 **Haverfordwest** is Pembrokeshire's main administrative and retail centre. The centre performed well in the health check with a low vacancy rate and an appropriate mix of convenience, comparison and service uses. Despite the presence of three out of centre retail parks the town centre has a high proportion of comparison floorspace and it is considered that this is the town's primary function. However, overall Haverfordwest is considered to be underperforming when compared with Carmarthen. It should also be noted that Carmarthen is set to significantly improve its retail offer with the opening of St Catherine's Walk and particularly Debenhams. As such, it is likely to draw more trade from the west to the detriment of Haverfordwest. We would therefore conclude that Haverfordwest needs to improve its offer (particularly in the categories of clothing, footwear and furniture) to remain vital and viable and prevent an increase in leakage of trade to the larger centres of the east.

7.35 This is reflected in the Pembrokeshire Resident's Survey where the majority of those surveyed stated that a better range of shops would encourage them to visit Haverfordwest more often:

Source: Pembrokeshire Resident's Survey 2007

Fig 40 Potential improvements to enhance the attractiveness of Haverfordwest

7.36 **Milford Haven** is a much weaker centre in retail terms. The health check revealed that its primary function is as a service centre with a much higher proportion of service uses than the UK average. Milford Haven's vacancy rate is quite low which indicates a healthy centre although it is considered that the quality of retail provision is poor. It is likely that Milford Haven's appeal as a retail centre will be impacted further by the recent closure of the town's Woolworths store and the closure and proposed redevelopment of the Kwik Save store.

7.37 The centre of Milford Haven is not seen to be complementary to the other centres within the Haven Towns Hub or beyond and it does not perform a role reflective of its size. This therefore raises certain questions regarding the future of Milford Haven. Specifically, there may be merit in downgrading Milford Haven and changing its focus from a retail centre. The alternative would be to seek to enhance the centre so it can more effectively serve the necessary role as a major retail centre; this would require a substantial level of new investment and a considerable increase in retailer representation. In the case of Milford Haven certain policy decisions will need to be made regarding the centre's future, particularly in terms of how it can achieve a more complementary role alongside the other centres.

7.38 **Neyland** is located within close proximity to a number of larger centres such as Milford Haven, Pembroke Dock and Haverfordwest and consequently its retail offer is considered to be relatively poor, The centre has a high vacancy rate with the majority of vacant units located along High Street. The centre appears to be struggling.

7.39 Although the centre is designated in the Wales Spatial Plan as a primary key centre, Pembrokeshire Council has designated it as a local centre within the Local Development Plan alongside centres such as Goodwick, Crymych and Letterston. As such, it is accepted that the retail offer would be relatively limited within the centre. This lessens concerns relating to the centre's performance. However, the vacancy rate still remains a clear concern and indicates that the centre is not fulfilling its role as a local centre by meeting the day to day needs of residents.

7.40 Furthermore, Neyland and Milford Haven are seen as 'linked settlements'. Therefore, the poor performance of both centres is a further concern although given the proximity to other centres such as Haverfordwest and Pembroke Dock this is unlikely to impact on the strength of the Haven Towns hub or the wider Spatial Plan Area as a whole. However, the two centres, either in isolation or together are not meeting the needs of local residents. It is therefore considered necessary to take measures to enhance the performance of both these centres to better meet the day to day needs of the local population and to complement the role of the larger centres.

7.41 **Pembroke Dock** is considered to be Pembrokeshire's secondary retail and service centre after Haverfordwest. The health check revealed that the centre follows the UK average fairly closely in terms of the number and proportion of units although the comparison provision is better than indicated as it does not include the retail units located along London Road.

7.42 Pembroke Dock is considered to be complementary to Haverfordwest and adequately serves southern Pembrokeshire. Therefore, development which will maintain and enhance the role of the centre should be sought in order to ensure the ongoing success of this centre. It is further considered that the role of Pembroke Dock should be assessed when appraising future aspirations for Milford Haven. Specifically, the success of Pembroke Dock comparative to a struggling Milford Haven begs the question as to whether the Spatial Plan Area can indeed sustain a large number of strong and successful centres and whether there a need for a shift in focus to concentrate on the stronger centres such as Haverfordwest and Pembroke Dock.

7.43 **Pembroke** is a less attractive retail centre than the neighbouring centre of Pembroke Dock. Indeed, the health check shows that the centre is predominantly a service centre and it is considered that it is currently losing out to its more successful neighbour.

7.44 The LDP designates both Pembroke and Pembroke Dock as town centres although they are considered to be 'linked'. The existing situation between the two centres indicates that they do have complementary roles to an extent although there is still a perception that Pembroke is losing out. It is considered that complementarity between these two centres needs to be improved to achieve better equilibrium, particularly in light of the proposed Martello Quays development at Pembroke Dock and the potential development of South Quay in Pembroke. This could be achieved through better public transport links (e.g. the train service between the two centres is once every 2 hours) and collaborative working between the Council and the developers to maximise benefits to these areas and the wider Spatial Plan Area.

7.45 **Johnston** is one of the smallest centres with just 13 shops. However, the mix of uses is good with 3 convenience and 5 comparison shops and a number of service uses. The centre appears to adequately meet the day-to-day needs of the local population. The centre is located within the Haven Towns hub within close proximity to Haverfordwest, Milford Haven, Neyland, Pembroke and Pembroke Dock. As such, the local centre is able to meet the day to day needs of local residents whilst having the support of the larger centres for less frequent shopping. Johnston’s role is therefore a complementary one.

Carmarthen Hub

7.46 **Carmarthen** successfully fulfils a number of functions. The centre benefits from a number of large convenience retailers such as Lidl, Aldi, Morrisons and Tesco. The comparison goods offer is strong with a wide variety of different retailers. The centre is considered to be both vital and viable. As a centre, Carmarthen is relatively self contained and supports the needs of local residents as well as those visiting the centre from further afield. It is considered likely that the centre will get even stronger (estimated increase of 24% in comparison expenditure) once the new town centre development is open and trading.

Fishguard Hub

7.47 **Fishguard and Goodwick** are considered to be ‘linked settlements’ with Fishguard acting as the main centre with support from Goodwick. The convenience and comparison retail offer within both centres is poor and largely act as service rather than retail centres. The centres appear to fulfil more of a local rather than a town centre role. Vacancy rates are relatively low indicating health, however it is considered that the majority of the units are occupied by low quality and value retailers.

The Other Settlements

7.48 **Narberth** is considered to be a good example of a sustainable town centre which has become well known for high quality niche retailing and as such has important links to tourism. The centre has a good mix of units although the number of service units is over double the UK average in terms of proportion of floorspace. Most notably the centre has no vacant units indicating that it is vital and viable. Narberth is complementary to the other, larger centres of the Spatial Plan Area which serve a more mainstream rather than niche role.

7.49 **St Davids** is similar to Saundersfoot in the fact that its appeal as a tourism destination means the retail offer caters for visitors rather than local residents. St Davids appears to be growing as a niche shopping centre with an increasing number of gift, gallery and antique shops. The proportion of floorspace indicates that the centre's predominant role is as a comparison shopping centre. St Davids appears to be a healthy centre, and is complementary to the larger centres within the SPA.

7.50 **Letterston** is a small centre with a significantly high number of vacant units at 47%. However, this equates to just 8% of total floorspace. The small size of these units may therefore be considered a barrier to their occupation.

7.51 **Tenby** is the main retail centre within the Pembrokeshire Coast National Park. It is a popular tourist destination and as such has a unique retail role with a need to meet the demands of both residents and visitors. The centre has a number of multiple retailers including WH Smith, Boots and New Look. The centre has more service units than the UK average and fewer comparison units which is likely to reflect the number of pub, restaurant and café units within the town. Tenby appears to be a healthy centre and offers a complementary role to the larger centres within the Spatial Plan Area.

7.52 **Saundersfoot** is a much smaller centre with no supermarket and no multiple retailers. The centre caters for visitors with comparison shopping geared towards visitors rather than locals and over half the service units occupied as pubs, restaurants and cafes. However, the centre does appear to be relatively healthy and given its tourist function it does offer a complementary role to Tenby and the larger centres within the Spatial Plan Area.

7.53 **Kilgetty** provides good local shopping facilities. The centre has a high proportion of convenience floorspace although this is due to the presence of a Co-op supermarket which provides an important local food shopping function. Overall the centre appears healthy and successfully meets the needs of the local population and as such is considered to be complementary.

7.54 **Crymych**, located to the edge of the National Park, has good road links to both Cardigan and Narberth. In terms of its retail provision it is considered to have one of the best convenience offers of the local centres with 6 such shops. Overall the centre has a good mix of shops and appears to be relatively healthy. In terms of complementarity, Crymych local centre serves local needs and as such is considered to be performing a complementary role, supported by the larger surrounding centres of Haverfordwest, Cardigan and Carmarthen.

7.55 **Newport** is also considered to be a tourism destination although to a lesser extent than some of the other centres in south Pembrokeshire. There are no other readily accessible centres within the area and as such Newport is well supported by local residents. Newport has just 29 shops, the majority of which are service units. However, the centre is complementary to the Spatial Plan Area by providing for the day to day needs of local residents although it is somewhat let down by the nearby larger centre of Fishguard which is underperforming and therefore not providing the support required by the smaller centres such as Newport.

7.56 Health check data is unavailable for the centres of Newcastle Emlyn, Pendine, Laugharne, Whitland and St Clears.

Complementary within the Haven Towns Hub

7.57 In terms of complementarity, Haverfordwest is clearly anchoring the hub as the key retail centre. However, it is still considered that the town is underperforming in the context of its role as Pembrokeshire's main retail and service centre, particularly in light of Carmarthen's on-going success and the current expansion of its retail offer. It is therefore considered that need exists to improve Haverfordwest's comparison retail offer to staunch the amount of trade loss to the larger centres to the east.

7.58 Haverfordwest is supported by the other four centres within the hub. Whilst Pembroke Dock appears to be performing well and providing complementary roles to Haverfordwest, neither Milford Haven nor Pembroke are serving the role within the Hub that would be expected given their size and status as Primary Key Settlements.

7.59 Milford Haven is clearly struggling with a poor quality retail offer. Whilst it would be ideal to improve the shopping opportunities within Milford Haven it may be more appropriate to explore different strengths of the town in order to focus retailing growth towards the other centres. Pembroke is also underperforming as a town centre although, given the short distance between the centres, there are clear opportunities to improve the complementarity between Pembroke and Pembroke Dock.

7.60 In terms of Pembroke's role, more assessment as to how the Martello Quays scheme will impact on Pembroke Dock's role as a centre needs to be undertaken in order to establish how best Pembroke can support this role and take advantage of the likely spin off benefits this development has the potential to offer. The potential redevelopment of the South Quays site in Pembroke is a clear opportunity to improve Pembroke town centre as both a retail, leisure and tourism destination to compliment Pembroke Dock.

7.61 In the light of the potential and proposed development in both Pembroke and Pembroke Dock, it is clear that improvements to the public transport network between these two centres is paramount to their success as complementary centres. It is also clear that if successful collaboration between the two centres in terms of future development is achievable this area could become a hub for retail and leisure activity all year round to the benefit of the Spatial Plan Area as a whole.

Complementary within the Carmarthen Hub

7.62 **Carmarthen** is a relatively self sufficient centre. In terms of convenience retailing the town has four supermarkets including a large Tesco Extra. The centre also has a number of multiple retailers supported by independent traders and service uses. The centre is predominantly a comparison shopping destination with 64% of floorspace dedicated to the sale of these types of goods. Overall, the centre follows the UK average well.

7.63 Carmarthen provides a strong retail centre for its residents and the surrounding settlements. The nearest competing centres are Haverfordwest and Swansea but given the differing nature of both of these centres, Carmarthen residents are unlikely to visit these centres on a regular basis. Given its strength, Carmarthen acts as the basis for the development of complementary relationships across the Spatial Plan Area and it is evident that its role is presently complemented by that of Haverfordwest as the second largest retail centre within Pembrokeshire – The Haven as well as by other, more local centres.

Complementary within the Fishguard and Goodwick Hub

7.64 **Fishguard**, supported by Goodwick, is intended to be the key retail centre for the North of Pembrokeshire. In terms of convenience shopping, the offer is limited to a Somerfield and a Tesco Express with no large foodstores located in this area. The town centre is largely occupied by service uses and independent comparison retailers.

7.65 The Hub is underperforming in retail terms with a high outflow of residents shopping for both convenience and comparison goods in Haverfordwest. It is evident that it is not performing a complementary role and is forcing the local population to make unsustainable shopping trips to centres much further afield. However, Fishguard benefits from relatively strong transport links to both Haverfordwest and Cardigan and it appears that these links are heavily relied upon by local residents whose retail needs cannot be met within the local area.

7.66 Given the Hub's importance to the northern area of Pembrokeshire it is considered that improvements to the retail offer, particularly food retailing, is paramount in order to improve both complementarity and sustainability within this hub and the Spatial Plan Area as a whole.

7.67 The retail data has shown a clear need for additional convenience food retailing within the Fishguard hub with the majority of residents currently travelling to Haverfordwest to undertake their food shopping. Therefore, the development of a medium to large foodstore would be beneficial to local residents and to the complementarity of the hub.

7.68 Furthermore, there would also appear scope to improve the comparison offer within the hub. The majority of residents travel to Haverfordwest to undertake this type of shopping which, given Haverfordwest's role as the main centre is reasonable. However, making Fishguard more self sufficient would have significant sustainability benefits. It is considered that improvement of the convenience offer may have a knock on effect upon the comparison offer as residents will travel to Haverfordwest less often and may be more inclined to shop in Fishguard town centre on a day to day basis.

7.69 Although it is considered that Fishguard can be improved it is unlikely that the town would be able to accommodate significant change and consequently it is unlikely to achieve full complementarity with the other hubs. However, it is recommended that planning policy should pursue a convenience foodstore in the town in the first instance and see what benefits this brings to the area in order to establish the next stage for Fishguard's on-going improvement.

Retailer Representation

7.70 The ranking of the centres by Management Horizons, which was discussed above, is largely based on a scoring system of the types of retailer presence within each of the centres surveyed. Some caution has to be taken with this data, particularly for the smaller centres as it is not necessarily a reflection of a centre's quality as not all retailers, particularly independents, are classified. However, it can offer a general overview of the nature of each centre which provides an additional insight into their relative performance and role within the Spatial Plan Area. As shown below, this can be reported in terms of the quality of the local retail representation:

	Luxury %	Upper %	U-Middle %	Middle %	L-Middle %	Value %	Not Classified %	Total %
Cardiff	1.1	2.3	23.9	38.5	11.2	6.0	17.0	100.0
Swansea	0.0	0.5	7.1	42.5	20.3	9.0	20.8	100.0
Carmarthen	0.0	0.0	2.2	52.2	16.9	11.0	17.6	100.0
Haverfordwest	0.0	0.0	0.0	34.8	23.9	16.3	25.0	100.0
Cardigan	0.0	0.0	0.0	53.7	7.3	12.2	26.8	100.0
Tenby	0.0	0.0	0.0	38.7	25.8	9.7	25.8	100.0
Pembroke Dock	0.0	0.0	0.0	6.5	45.2	19.4	29.0	100.0
Haverfordwest, Withybush Retail Park	0.0	0.0	8.0	12.0	0.0	0.0	80.0	100.0
Pembroke Dock, Bierspool	0.0	0.0	0.0	62.5	0.0	12.5	25.0	100.0
Milford Haven, Havens Head Business Park	0.0	0.0	0.0	75.0	0.0	18.8	6.3	100.0
Milford Haven	0.0	0.0	0.0	0.0	21.4	35.7	42.9	100.0
Fishguard	0.0	0.0	0.0	55.6	0.0	22.2	22.2	100.0
Newcastle Emlyn	0.0	0.0	0.0	87.5	0.0	0.0	12.5	100.0
Carmarthen, Johnstown	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0
Pembroke	0.0	0.0	0.0	62.5	0.0	0.0	37.5	100.0
Milford Haven, Neyland	0.0	0.0	0.0	60.0	0.0	0.0	40.0	100.0
Kilgetty	0.0	0.0	0.0	75.0	0.0	0.0	25.0	100.0

Whitland	0.0	0.0	0.0	75.0	0.0	0.0	25.0	100.0
Narberth	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0
Carmarthen, St Clears	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0
Haverfordwest, St Davids	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0
Haverfordwest, Letterston	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0
Saundersfoot	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0

Source: Management Horizons, 2008

Table 34 Quality of retailer representation in Spatial Plan Area

7.71 As can be seen, no centre within the Spatial Plan Area contains a shop considered to be 'luxury' or 'upper' although this is unsurprising given that Cardiff only scored a combined 3.4% for these categories. Carmarthen is the only centre in the Spatial Plan Area with representation from the 'upper middle' shops category (again emphasising its dominant role). A number of centres had a high representation of 'middle' shops although caution must be taken when looking at the results for the smaller centres given the limited representation of multiple retailers in these centres. Overall, this evidence supports the other data which shows that Carmarthen is the strongest centre within the Spatial Plan Area.

7.72 However, the most significant point made by this table is those centres with a high number of units classed as 'Value'. The centre with the highest percentage of value shops is Milford Haven (35.7%) followed by Fishguard (22.2%), Pembroke Dock (19.4%) and Haven's Head (18.8%). In the case of Pembroke Dock and Haven's Head the value retail offer includes popular stores such as Brantano, Wilkinsons, Instore and Peacocks which occupy new purpose built units and attract a high volume of shoppers. However, in the case of Fishguard and Milford Haven town centres it is considered that this poor quality retail offer is reflected in the performance of both centres as unpopular comparison shopping destinations.

7.73 A number of high street shops have closed during the economic downturn including Principles, Barratts and MK One. Due to limited representation, the majority of these store closures have had little impact on the Spatial Plan Area, although it is considered that the closure of Woolworths could have a more significant impact on retailing. Woolworths had branches in Carmarthen, Haverfordwest, Milford Haven, Pembroke Dock and Tenby. Whilst we do not consider it likely that the closure would impact so substantially on the larger towns it could impact on the retail offer of Milford Haven and Tenby which are smaller and would have been more reliant on the retailer for providing an anchor store.

Implications for Complementarity

7.74 The main retail centres within the Spatial Plan Area are Carmarthen and Haverfordwest. Both centres have a range of shops but also have the better quality shops able to attract customers from greater distances. These centres are therefore able to meet a wider range of consumer needs which is reflected in their ability to draw trade from relatively wide areas.

7.75 Pembroke Dock currently serves a secondary retail role to Haverfordwest in the Haven Towns hub with a more limited range of retailers and more 'lower middle' and 'value' shops than Haverfordwest. However, the London Road/Bierspool development has changed this slightly and is able to attract a greater number of shoppers to the centre.

7.76 The less well performing centre within the Haven Towns hub is Milford Haven with a worse range of shops which are largely focused upon value retailing. However, the Haven's Head Retail Park does provide some good shopping opportunities with a Tesco and a large Boots.

7.77 Fishguard's role is relatively limited and it does not effectively meet the needs of the local population. It is considered that opportunities exist to enhance the retail offer within the town centre, particularly if a new medium/large foodstore could be accommodated. Its very high level of value retailers highlights a need to focus upon attracting a better retail offer into the town.

7.78 This evidence highlights the importance of improving the quality of shops within the centres, not only in terms of multiple retailers but also the types of independent traders attracted to the various centres. Ideally, the centres should aim to have a full range of retailers including value but with a predominance of 'upper middle' and 'middle' retailers. Whilst this would act as a key step towards the achievement of increased complementarity, it is recognised that some centres will find this more difficult to achieve and as such it might need to be accepted that the retail role of some centres, such as Fishguard, Goodwick and the local centres, will remain limited. Therefore, the preference might be to focus upon the neighbouring centres of these weaker centres (e.g. focus on Haverfordwest and Pembroke Dock) and streamline the number of 'main town centres'.

Potential Areas of Growth

7.79 Estates Gazette interactive (EGi) is a database which documents retailer requirements within UK towns and cities. Within the Spatial Plan Area the towns of Carmarthen, Haverfordwest, Milford Haven, Pembroke Dock, Fishguard and Tenby each have in excess of 72 entries of retailers who have expressed an interest in gaining representation within the area in the past 12 months. However, it should be noted that some retailers who have put their names forward for each town are looking for representation within the area rather than in every town.

7.80 A full breakdown of the types of retailers seeking representation in each town is provided in Appendix 4. However, below is a brief summary for each centre:

Carmarthen

7.81 67 retailers are looking for representation within Carmarthen. These include the following:

a **Clothing & Footwear:** Ann Summers, BHS, Envy, Next, Phase Eight, H&M and TK Maxx;

b **Bulky Goods:** Allied Carpets, Bensons for Beds, Dreams, Floors-2-Go and Homebase;

c **Variety:** Argos, Home Bargains, Asda Living and Tesco Homeplus;

d **Sports:** Blacks, JD Sports, JJB Sports and O'Neill;

e **Other:** Borders, Currys Digital, HMV, Original Factory Shop and Vision Express.

7.82 There is a good mix of retailers looking for representation within the centre with key names such as Next, BHS, HMV and Borders all looking for opportunities within the area.

Haverfordwest

7.83 There are 69 retailers looking for suitable retail premises within Haverfordwest. These include:

a **Clothing & Footwear:** River Island, H&M, New Look, Envy and BHS;

b **Variety/Department:** Debenhams, Asda Living, Home Bargains, Marks & Spencer, Tesco Homeplus and Wilkinsons;

c **Bulky Goods:** Pets at Home, Dreams, BHS Home, B&Q, Bensons for Beds and Allied Carpets; and

d **Other:** Borders, HMV, Mamas and Papas, Mothercare and Vodaphone.

7.84 Some of the big UK retailers are interested in gaining representation in Haverfordwest including Debenhams, Marks & Spencer and BHS. Therefore, there would appear opportunity to attract an anchor retailer to the town centre to help Haverfordwest retain more trade and prevent leakage to the east.

Milford Haven

7.85 Some 69 retailers are also looking to gain representation within Milford Haven. These retailers include:

a **Clothing & Footwear:** River Island, Next, New Look, H&M, BHS and Envy;

b **Variety/Department:** Marks & Spencer, Debenhams, Asda Living, Tesco Homeplus and Home Bargains;

c **Other:** Jessops, Mothercare, HMV, Currys Digital and Borders.

7.86 Milford Haven has a number of retailers interested in the centre although it is important that retailers tend to do a blanket search of an area and therefore given the existing offer they are more likely to locate in the nearby larger centre of Haverfordwest. However, it is noteworthy that Milford Haven has not been excluded from the retailers research which demonstrates that interest is out there and opportunities to attract certain retailers should be encouraged.

Pembroke Dock

7.87 Pembroke Dock has 72 retailers interested in gaining representation within the centre. The main retailers interested in the centre are as follows:

a **Clothing & Footwear:** River Island, Peacocks, Next, New Look, H&M, Envy and BHS;

b **Variety/Department:** Wilkinsons, Asda Living, Tesco Homeplus, Marks & Spencer, Home Bargains and Debenhams;

c **Bulky Goods:** Pets at Home, Homebase, Dreams, Carpetright and B&Q; and

d **Other:** Mothercare, HMV, Card Factory and Borders.

7.88 Pembroke Dock appears to have certain retailers targeting the centre such as Peacocks and Card Factory who did not require representation in the larger centres. It is considered that with the development of Martello Quays Pembroke Dock has the ability to attract a number of top name retailers into the centre.

Fishguard

7.89 A total of 68 retailers are looking for representation within Fishguard. These retailers include:

a **Clothing & Footwear:** River Island, Next, New Look, H&M and BHS;

b **Variety/Department:** Marks & Spencer, Home Bargains and Debenhams; and

c **Other:** HMV, Vodaphone, Carphone Warehouse, Borders and Currys Digital.

7.90 Fishguard has a number of quality retailers interested in locating within the town centre. Therefore, there could be benefit is researching whether any of these retailers could be accommodated within the centre as their presence would be important in helping to enhance the role of the town as a retail centre and a key settlement to serve the north of Pembrokeshire.

Tenby

7.91 72 retailers are looking for representation within Tenby. The mix of retailers reflects those of the other town centres with the main retailers as follows:

a **Clothing & Footwear:** River Island, Next, New Look, H&M and Envy;

b **Variety/Department:** Argos, Marks & Spencer, Wilkinsons, Debenhams, B&M, Tesco Homeplus and Asda Living; and

c **Other:** Vodaphone, O'Neill, Mamas and Papas, Jessops, Borders, Carphone Warehouse and Card Factory.

7.92 Although a number of retailers are likely to be looking for representation in the area certain retailers are specifically targeting Tenby such as Argos and Card Factory. There is scope to improve Tenby's retail offer although it should be appropriate to the size and nature of the centre.

Retail Allocations, Commitments and Proposals

Committed Retail Development

The Carmarthen Hub

7.93 **St Catherine's Walk, Carmarthen:** Development has started on a mixed use scheme on the former livestock market in Carmarthen town centre. The development, which is to include a multi-screen cinema, market hall, 24 shops/cafes/bars and a Debenhams department store, is due to open in 2009.

7.94 This development is likely to prove to be a major asset to Carmarthen town centre and has clear potential to draw more trade from the west as well as clawing back trade currently leaking out to the larger centres in the east such as Swansea and Cardiff.

7.95 In terms of complementarity, as the centre's appeal as a shopping destination increases so does its ability to compete with Haverfordwest. Therefore, to ensure that complementarity between Haverfordwest and Carmarthen is maintained, it is essential for Haverfordwest to be able to compete effectively with Carmarthen in its retail offer to ensure equilibrium between the centres and prevent significant trade loss to the east of the Spatial Plan Area.

Fishguard and Goodwick Hub

7.96 **Supermarket, Fishguard (Application 04/1591/PA):** An application was submitted in outline in 2004 for the erection of a supermarket at the site of Fishguard Junior CP School on West Street in Fishguard. The application received conditional approval in December 2005. In 2008 a subsequent application (08/0908/PA) was submitted to vary condition 3 to allow a further 2 years to submit the application. This was approved in December 2008.

7.97 The study has recognised a need for a foodstore in Fishguard in order to improve complementarity in this part of the Spatial Plan Area. Therefore this permission provides a basis by which this identified need might be satisfied.

7.98 A large foodstore in Fishguard would significantly improve Fishguard's retail offer, have considerable benefits in terms of sustainability and travel patterns and ultimately make Fishguard a more complementary centre to the benefit of the Spatial Plan Area as a whole.

Proposed Retail Development

The Haven Towns Hub

7.99 **Martello Quays, Pembroke Dock (06/1416/PA):** A planning application was submitted to Pembrokeshire Council in 2006 for the proposed development of a Leisure Marina with associated infrastructure and related commercial, retail, leisure, Hotel/Casino and car parking uses in Pembroke Dock. Specifically, press releases state that the project is likely to include up to a 260 marina berths and associated car parking, marine workshops and a chandlery, 450 houses and apartments, a new public promenade, shops, a pub and restaurant, a hotel with casino, and a five-screen multiplex cinema. Ouline planning permission was granted for the development in April 2009.

7.100 This development represents an opportunity to promote Pembroke Dock as a retail and leisure centre and it is likely that the town will see a hub of activity throughout the year if the development goes ahead. In terms of complementarity, given Pembroke Dock's current role as the secondary town centre within the Haven Towns Hub, this development would seem appropriate in this location and is considered complementary to the main centre of Haverfordwest.

7.101 It has also become apparent that **South Quay in Pembroke** town centre is likely to come forward for development in the near future. The initial proposals for this site indicate a mixed use development of residential and retail although no planning application has been submitted to date so it is difficult to comment on this in detail. Given the close proximity to the Martello Quays site there is significant opportunity to further promote complementarity between these two neighbouring centres through the creation of a separate retail and leisure hub.

7.102 It is understood that there are proposals to demolish the existing **Kwik Save in Milford Have**n to develop a medical centre and pharmacy. This could potentially have implications on convenience shopping patterns within the centre although given alternative provision (Tesco/Lidl/Somerfield) it is not considered that this will have a significant further impact on complementarity. Furthermore, the provision of healthcare facilities within accessible locations is seen as a vital element of complementarity and therefore benefits in other areas could be seen as a result of this development.

Other Centres

7.103 **Development of a Lidl foodstore at Castle Motors, Station Road, Newcastle Emlyn (Application W/20113):** The application is for a foodstore approximately 1,000 sq. m located on an out of centre site. The application has not been determined to date.

7.104 Newcastle Emlyn residents currently undertake the majority of their food shopping in Carmarthen and Newcastle Emlyn itself. If approved, this application could help to improve the ability of Newcastle Emlyn to meet the needs of its local population, thereby enabling it to become more self-sufficient as a centre and help further negate the need for residents to travel to Carmarthen to undertake their food shopping. Therefore, in terms of complementarity and sustainability, an additional in foodstore within Newcastle Emlyn would be seen as beneficial.

7.105 **New Hedges, Tenby (Application 04/0338/PA):** A planning application was received by the Council in June 2004 for a Business Park (Class B1 & B8) Foodstore (4,200m sq. m net) and Park & Ride facility, associated car parking, landscaping and access at Land adjacent A478, New Hedges, near to Tenby. The application was received by the Council in June 2004 and has not been determined to date.

7.106 Currently, residents within the Tenby area undertake their food shopping in Haverfordwest, Carmarthen, Pembroke Dock and Tenby itself. Therefore, the provision of an additional foodstore within New Hedges could potentially increase sustainability within the Spatial Plan area by encouraging people to travel shorter distances to meet their convenience shopping needs. It is not considered appropriate to comment on the suitability of New Hedges as a location or on the application in general, however, in order to maximise opportunity for complementarity it would be more beneficial to direct new retail development to the larger, more established settlements with the smaller settlements providing a more supportive role.

Complementarity within the Spatial Plan Area

7.107 In terms of existing shopping patterns both the Haven Towns hub and the Carmarthen hub appear healthy, attracting the majority of convenience and comparison expenditure within the Spatial Plan Area. As reflected in the Management Horizons data, both of these hubs are key shopping destinations for the residents of the Spatial Plan Area. The two hubs appear to compliment each other rather than compete with residents tending to choose the hub closest to their homes. However, it has been previously noted that future development in Carmarthen could impact upon this complementarity.

7.108 Within the Haven Towns hub there are certain implications from having so many main town centres within such close proximity. Specifically, the centres clearly cannot all perform the same roles and as such some are struggling as others thrive.

7.109 Haverfordwest is clearly the main town centre at the top of the hierarchy and is the only centre able to offer comparison to Carmarthen. The centre is performing well and it attracts much expenditure from the surrounding centres although there is plenty of scope for improvement, particularly in response to the new retail development in Carmarthen.

7.110 Pembroke Dock, supported by Pembroke, is the centre best serving the south of Pembrokeshire and takes the role of the secondary main town centre. The centre is complementary to Haverfordwest and has much scope for improvement with the proposed Martello Quays and South Quay developments. The towns are located south of the Cleddau Bridge and as such there is less overlap with the north. However, this primarily extends to convenience rather than comparison shopping with Haverfordwest having a strong draw across the bridge.

7.111 Milford Haven and Neyland are considered as being at the bottom of the pile and serving a more secondary town centre role. Milford Haven in particular, as the joint largest settlement, is not meeting its role as a main town centre and suffers from a considerable leakage of expenditure. The centre does not serve a complementary role and whilst this is not necessarily an issue within this area given the strength of the surrounding centres, it does highlight the need for a better understanding and definition of the roles of each of the respective centres to establish the complementary roles of the different towns.

7.112 Pembroke and Neyland, as centres in their own right are more appropriate as local centres. However, they do have a supportive function to their neighbouring centres of Pembroke Dock and Milford Haven respectively. Therefore, their designation as main town centres in conjunction with these larger centres is appropriate and they serve a complementary function.

7.113 The Fishguard Hub however is struggling to either retain or attract retail expenditure with the majority of both convenience and comparison expenditure absorbed by the Haven Towns Hub. It is not presently serving a complementary function and it is considered that there is a need for additional convenience retailing in order to remedy the current convenience shopping pattern which sees the majority of residents travelling to the Tesco and Morrisons foodstores in Haverfordwest. If this is provided, the new foodstore would enable Fishguard to be able to serve a more appropriate role reflective of its size. This is considered even more important given a need to adequately serve the rural hinterlands in the north of Pembrokeshire. In terms of comparison retailing, people tend to travel less often to undertake this kind of shopping and therefore it would appear more acceptable, although not ideal, that the majority of residents travel to Haverfordwest to undertake this type of shopping. As with all of the settlements in Pembrokeshire, however, there are nevertheless clear opportunities to improve comparison shopping within Hubs in order to reduce the amount of leakage to the larger centres.

7.114 The smaller centres within the Spatial Plan Area are ultimately serving their rural hinterlands. One of the most successful centres is considered to be Narberth which has a niche role and is renowned for being an attractive centre with a high quality retail offer. The centre is thriving and an excellent example of a sustainable town centre. Its central location means that it attracts visitors from a wide area, although its main function is more tourism related.

7.115 Tenby is a seaside town with a predominantly tourist focused centre but with associated retail role which serves local people and visitors alike. Saundersfoot is secondary to Tenby with similar role. St Davids has a slightly more limited role which, considering its more isolated location is a slight concern with regards the goals of complementarity. A small supermarket in the centre has helped but opportunities exist for increased levels of more specialist retailing to build upon the recent progress that has been seen in respect of the development of a niche retail function.

7.116 The distribution of centres does show some complementarity with a seemingly appropriate hierarchy of main and smaller centres. It also emphasises the potentially vital role of small centres in serving their catchment areas and the rural hinterlands which is particularly important in peripheral areas, as well as the fact that some small centres can have a disproportionately large role, for example as a niche centre.

7.117 As part of the LDP process, it will be important to review and clarify the roles of the various centres and to establish appropriate policies that will help to support and enhance them as retail destinations. This may consequently lead to some modification of the hierarchy and might also help to facilitate the necessary levels and patterns of development that are required to improve the level of complementarity that exists between each of the centres.

8.0 # Leisure

Introduction

8.1 Leisure facilities and services are important for the whole Spatial Plan Area population. There is therefore a need to ensure that there is an adequate provision and a wide range of facilities which recognise the differences in people's individual aspirations.

8.2 Leisure facilities within such a sparsely populated rural area will tend to have quite large catchment areas. Also, due to the distribution of the population, not all settlements are expected to have an equivalent level of leisure provision. However, it is important to ensure that all people have access to adequate facilities so that their needs can be met, albeit recognising that they might not enjoy the same proximity to facilities and services as those living in other parts of the Spatial Plan Area. In this regard, complementarity will require an adequate provision of leisure facilities in the locations that are most readily accessible by all communities across the Spatial Plan Area.

8.3 This chapter considers the existing provision of leisure facilities and opportunities within the Spatial Plan Area and the extent to which these serve the needs of the local population within each settlements and the rural hinterlands beyond.

8.4 In an area as tourism focused as Pembrokeshire – The Haven it is easy to confuse tourism and leisure facilities and, indeed, there will be some overlap as many tourists will enjoy leisure facilities whilst on holiday whilst the local population might also make use of those facilities that are primarily targeted towards visitors. However, for clarity, this section of the study only seeks to analyse the following leisure activities which are undertaken by local residents on a fairly regular basis:

a Cinema;

b Theatre;

c Tenpin Bowling;

d Pubs, Bars and Restaurants;

e Council run Leisure Centre;

f Private health and fitness clubs;

g Swimming Pool; and,

h Bingo.

Existing Facilities

8.5 Leisure facilities are located at various locations across the Spatial Plan Area. These facilities have been mapped in Appendix 5 although their general locations are provided in the table below.

Hubs	Cinema only	Theatre only	Cinema & Theatre	Bowling	Public Leisure Centre with Pool	Public Leisure Centre without Pool	Fitness Club	Swimming Pool	Pubs & Restaurants	Bingo
Carmarthen			1		1		3		64	
Haverfordwest	1					2	1	1	64	
Milford Haven			1	1	1	1	1		29	1
Neyland								1	4	
Pembroke					1				19	
Pembroke Dock							2		23	1
Fishguard			1		1				15	
Goodwick									2	
Other Settlements within SPA										
Crymych					1				2	
Kilgetty							1		3	
Newcastle Emlyn						1	1		12	
Newport									8	
St Clears						1	1		8	
Saundersfoot									10	
Tenby	1	1			1				39	
Letterston									2	
Laugharne									4	
Pendine									4	
Kilgetty									3	
Johnston									2	
St Davids	1				1				8	
Whitland									7	
Narberth		1		1		1		1	22	

Table 35 Existing Leisure Facilities in the Spatial Plan Area

8.6 This shows that Carmarthen has a relatively limited range of leisure facilities for a town of its size and nature although it does have several places to eat and drink. Carmarthen does not have a multiplex cinema (although an Apollo multiplex is due to open in 2009) or ten pin bowling facility. There is also only one leisure centre and swimming pool, although there is a good supply of private health clubs.

8.7 By contrast, the Haven Towns Hub has a relatively good provision with representation in every category. Milford Haven and Haverfordwest appear to have the best provision of the centres within this hub. The quality of provision in Haverfordwest has recently been improved following the opening of a new multi-million pound leisure centre opened in Haverfordwest in March 2009 at the former County Offices at St Thomas Green. The development provides a 25m eight lane swimming pool, sports hall with badminton courts, dance studio, two storey health and fitness suite and other facilities including a crèche, café and meeting room. This new facility at Haverfordwest has sparked a call to close the existing swimming pool at St Davids. Current proposals are to close the pool and use the site to develop a multi-purpose sports hall for the area. However, this has met widespread local opposition.

8.8 Neyland, Pembroke and Pembroke Dock currently offer poor leisure provision but are well supported by the larger centres of Milford Haven and Haverfordwest.

8.9 The Fishguard Hub also have relatively limited provision with only a single screen cinema and combined theatre and a leisure centre with a swimming pool. Both Fishguard and Goodwick also have a relatively limited range of places to eat and drink.

8.10 Of the other centres, Tenby stands out as a place to eat and drink with 39 such establishments which is a clear reflection of its important tourism function. Narberth's provision is also considered good for its size with a theatre, bowling alley, leisure centre, swimming pool and a number of places to eat and drink.

8.11 The Haven Towns hub is therefore considered to be the best catered for in terms of leisure facilities as a whole. Each hub has at least one public leisure centre with pool and both the Carmarthen and Haven Towns Hubs also provide private health and fitness facilities. All of the hubs also have a combined cinema and theatre although these are one/two screen facilities with no large multiplex cinemas currently located within the Spatial Plan Area. The SPA also has only two ten pin bowling facilities which are located in Narberth and Milford Haven.

8.12 The adequacy of the existing facilities is appraised in further detail below.

Proposed Changes in Leisure Facilities

8.13 Several leisure developments are currently under construction or proposed for development within the Spatial Plan Area.

a. The **St Catherine's Walk** development which is currently under construction in Carmarthen town centre is due to open in 2009. It is a mixed use scheme on the former livestock market and is to include a multiplex Apollo cinema and 24 shops, cafes and bars. It is understood that negotiations are currently underway with Starbucks, Frankie & Benny's and Barracuda as potential occupiers of these units. This development, which also has Debenhams as its anchor store, is expected to boost Carmarthen's appeal as both a shopping and leisure destination and will better serve the resident's of the Carmarthen hub and beyond.

b. In Pembroke Dock, a scheme known as **Martello Quays** is proposed. This scheme was granted outline planning permission 23rd April 2009. The development proposes up to a 260 berth marina, public promenade, shops, pub, restaurant, hotel and casino (the first in Pembrokeshire) and a five screen multiplex cinema. This development is likely to appeal to both residents and visitors thereby enhancing the leisure and tourism role of the town.

c Furthermore, although no planning application has been submitted to date it is understood that proposals are currently being drawn up to develop **South Quay** in Pembroke. This scheme is likely to include new commercial and residential units although the details at this stage in the process are vague.

8.14 It is noteworthy that all three major new leisure schemes are located in Primary Key Settlements that are presently underserved by leisure facilities. They will therefore be important in raising the profile of these settlements as leisure centres and in encouraging a greater level of activity in the future.

8.15 Martello Quays and South Quay are within close proximity of one another. Therefore, it would appear as if opportunity exists to provide a 'leisure hub' in the Pembroke/Pembroke Dock part of the Spatial Plan Area with a particular focus on the water as a leisure resource.

Leisure Expenditure

8.16 An understanding of local leisure spending patterns is important in helping to understand the demand for leisure facilities and the extent to which the existing provision is sufficient to meet the needs of the local population. This is helpful in supplementing the evidence set out above regarding the distribution of facilities relative to the main population centres. Data obtained from Experian (2006) provides figures for leisure spend per person per annum.

Activity	Carmarthen Hub	
Proportion (%) and total spend (£) per person per annum on leisure	**%**	**£**
Accommodation e.g. hotel, hostel, B&B	2.9%	£54
Cultural e.g. cinema, theatre	12.8%	£237
Gambling e.g. casino, bingo	8.7%	£160
Hair/Beauty/Spa	4.6%	£84
Recreation and Sport	6.0%	£110
Pubs, Bars, Restaurants and Cafes	65.0%	£1,200
Total	**100%**	**£1,845**

Source: Experian Business Strategies, 2006

Table 36 Leisure expenditure in Carmarthen Hub

8.17 In the Carmarthen hub, residents are predominantly spending on eating and drinking in the various pubs, restaurants, bars and cafes followed by cultural activities, gambling and recreation and sport.

Activity	Haverfordwest		Milford Haven		Pembroke		Pembroke Dock		Neyland		Haven Hub Other	
Proportion (%) and total spend (£) per person per annum on leisure	%	£	%	£	%	£	%	£	%	£	%	£
Accommodation e.g. hotel, hostel, B&B	2.8%	£48	2.7%	£45	2.8%	£48	2.4%	£42	2.7%	£49	3.8%	£74
Cultural e.g. cinema, theatre	13.3%	£232	13.2%	£222	13.4%	£225	13.3%	£230	12.9%	£233	12.6%	£242
Gambling e.g. casino, bingo	8.8%	£153	10.1%	£170	9.9%	£166	10.2%	£176	9.9%	£179	6.7%	£129
Hair/Beauty/Spa	4.4%	£76	4.3%	£73	4.4%	£74	3.8%	£66	4.3%	£77	5.6%	£107
Recreation and Sport	5.7%	£100	5.3%	£89	5.6%	£94	4.9%	£84	5.7%	£103	8.2%	£157
Pubs, Bars, Restaurants and Cafes	65.0%	£1,131	64.5%	£1,089	64.0%	£1,078	65.4%	£1,129	64.4%	£1,162	63.2%	£1,216
Total	**100%**	**£1,740**	**100%**	**£1,688**	**100%**	**£1,685**	**100%**	**£1,727**	**100%**	**£1,803**	**100%**	**£1,925**

Source: Experian Business Strategies, 2006

Table 37 Leisure expenditure in Haven Towns Hub

8.18 Of the Haven Towns hub, other than the 'Haven Hub Other' area (i.e the area outside of the main settlements), Neyland is the settlement with the highest proportion of leisure expenditure whilst Pembroke has the lowest. All the settlements follow the same general pattern of expenditure with little fluctuation. However, Haverfordwest and Neyland residents appear to spend more on recreational and sporting activities compared to those living in the other settlements.

Activity	Fishguard		Goodwick	
Proportion (%) and total spend (£) per person per annum on leisure	%	£	%	£
Accommodation e.g. hotel, hostel, B&B	2.6%	£44	2.7%	£45
Cultural e.g. cinema, theatre	13.0%	£221	12.9%	£219
Gambling e.g. casino, bingo	9.1%	£154	9.7%	£164
Hair/Beauty/Spa	4.8%	£82	4.2%	£71
Recreation and Sport	6.1%	£104	5.9%	£101
Pubs, Bars, Restaurants and Cafes	64.3%	£1,091	64.7%	£1,098
Total	**100%**	**£1,696**	**100%**	**£1,698**

Source: Experian Business Strategies, 2006

Table 38 Leisure expenditure in Fishguard Hub

8.19 In the Fishguard and Goodwick hub expenditure between the two settlements is very similar. This is likely to be a reflection of the facilities within the area.

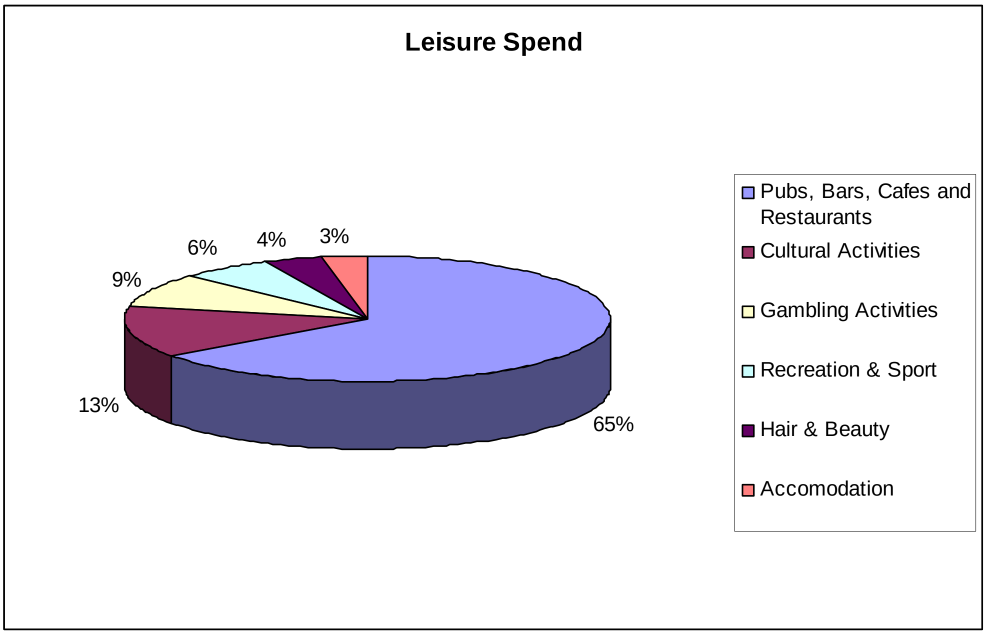
Activity	Johnston		Tenby		Narberth		St Clears		Saundersfoot		St Davids		Newcastle Emlyn	
Proportion (%) and total spend (£) per person per annum on leisure	%	£	%	£	%	£	%	£	%	£	%	£	%	£
Accommodation e.g. hotel, hostel, B&B	3.1%	£51	2.6%	£46	2.5%	£44	3.8%	£68	3.2%	£58	4.1%	£78	3.9%	£75
Cultural e.g. cinema, theatre	13.0%	£213	12.9%	£227	13.0%	£230	12.4%	£220	12.6%	£229	12.5%	£241	12.2%	£234
Gambling e.g. casino, bingo	9.0%	£148	8.9%	£157	9.2%	£162	7.2%	£128	7.6%	£138	6.9%	£132	6.5%	£124
Hair/Beauty/Spa	4.6%	£76	4.9%	£86	4.7%	£83	4.6%	£81	5.5%	£99	4.9%	£95	4.6%	£88
Recreation and Sport	6.2%	£102	5.8%	£101	5.5%	£98	8.4%	£150	7.2%	£130	8.9%	£171	8.9%	£171
Pubs, Bars, Restaurants and Cafes	64.0%	£1,047	64.9%	£1,139	65.1%	£1,153	63.6%	£1,132	64.0%	£1,162	65.8%	£1,266	63.8%	£1,219
Total	**100%**	**£1,637**	**100%**	**£1,756**	**100%**	**£1,770**	**100%**	**£1,779**	**100%**	**£1,816**	**103%**	**£1,983**	**100%**	**£1,911**

Source: Experian Business Strategies, 2006

Table 39 Leisure expenditure in Other Settlements

8.20 For the other settlements within the Spatial Plan Area expenditure fluctuates from £1,637 per annum in Johnston to £1,983 in St Davids. Certainly, St Davids and Newcastle Emlyn residents appear to have more capacity to spend money on leisure activities which is likely to be a reflection of affluence. For gambling activities, Narberth scored highest followed by Tenby and Johnston and recreation and sport expenditure was much higher in St Davids and Newcastle Emlyn in comparison to the other settlements. All settlements had a similar proportion of expenditure going to pubs, bars, restaurants and cafes.

8.21 Overall, the majority of leisure expenditure within the Spatial Plan Area (approximately 65%) goes to pubs, bars, cafes and restaurants which (together with the level of tourist demand for such uses) is reflected in the number and distribution of facilities as shown in Appendix 5. This is generally followed by cultural activities such as the cinema and theatre (approx 13%) of which there appears to be a fair distribution of facilities, gambling (approx 9%), recreation and sport (6%), hair and beauty (approx 4%) and accommodation at hotels/hostels (approx 3%).



Source: Experian Business Strategies, 2006

Fig 41 Leisure Expenditure within the Spatial Plan Area

Leisure Operator Demand

8.22 Estates Gazette Interactive (EGi) monitors the aspirations of a number of leisure and retail operators throughout the UK. Running a scenario for each of the settlements has given an indication of interest by leisure operators within the Spatial Plan Area. The search was only completed for interest submitted over a 12 month period (April 2008 – April 2009). Therefore, interest may be greater as some operators who expressed interest before this period may still have aspirations for representation in the area.

8.23 Interest in the Spatial Plan Area by national operators is relatively limited. The only settlements with interest are Haverfordwest, Carmarthen, Milford Haven, Pembroke Dock, Fishguard and Tenby. This interest is from the following operators looking for representation within the area:

a Burger King;

b Subway;

c Tootsies;

d JD Wetherspoon;

e Fitness First;

f Energie Fitness Clubs; and,

g Everyman Cinema

8.24 Greggs the Bakers is also looking for representation in Haverfordwest and Tenby and McDonalds has an interest in Milford Haven.

Capacity for Additional Facilities

Methodology

8.25 The existing and proposed leisure facilities in terms of cinema, ten-pin bowling, leisure centre, swimming pool, private health and fitness club and theatres have been mapped on a series of plans located within Appendix 5. Each facility has then been allocated a likely drive time (e.g. for cinemas single screen facilities have been allocated a 20 minute drive time and multiplex cinemas have been allocated a 30 minute drive time). These maps therefore clearly show the relative availability and accessibility of certain leisure facilities which can then act as guide as to where new facilities should be directed if they are indeed required.

8.26 For cinemas, ten-pin bowling and private health and fitness centres a capacity analysis for additional facilities has also been undertaken. This has been based on a standard methodology used in leisure studies which is explained in detail for each facility below. In the absence of any survey data for leisure facility usage this is considered to be the most appropriate methodology. However, given that the methodology is not based on actual usage, further work may be required at a later date if it is considered that new facilities are needed within the Spatial Plan Area.

Cinemas

8.27 The Spatial Plan Area currently has 7 cinema screens in 6 locations. Half of all the cinemas operate as cinemas only with the other half doubling as theatres and concert halls. The only cinema to provide more than one screen is the Palace Cinema in Haverfordwest although it should be noted that a new multiplex is currently under construction in Carmarthen town centre and another is proposed at Martello Quays in Pembroke Dock. There are no cinemas of any substantial size on the edge of the Spatial Plan Area.

8.28 Although it is not possible to establish the current usage of cinema facilities without undertaking a household survey, it is possible to assess the likely future demand for cinema admissions within the study area. Dodona Research published a report in March 2007 entitled 'Cinemagoing' which gave national forecast figures for cinema visits per person between 2001 to 2007.

8.29 We have therefore adopted these growth rates and assumed growth at 2.6% per annum beyond 2007 based on a continuation of Dodona's annual growth rate between 2005 and 2007 up to 2009, 2011, 2016, 2021 and 2026.

8.30 The catchment population has been converted into a total number of cinema admissions per annum based on the national visitation rate (2.8 per person in 2003) and visitation rates have been projected based on a 2% growth rate per annum (NB: the data does not allow for tourist spend).

Spatial Plan Area	2009	2011	2016	2021	2026
SPA Population	158,020	160,100	165,700	171,000	175,150
Visits Per Annum	3.15	3.28	3.62	4.00	4.42
SPA Visits Per Annum	497,763	525,128	599,834	684,000	774,163
Optimum Visits Per Screen	75,000	75,000	75,000	75,000	75,000
Screen Potential (SPA)	6.64	7.00	8.00	9.12	10.32
Existing Screen Provision	7	14	14	14	14
Screen Surplus/Deficit	-0.36	-7.00	-6.00	-4.88	-3.68

Table 40 Estimated Cinema Capacity in the Spatial Plan Area

8.31 This shows that there is no immediate need to provide additional cinema facilities within the Spatial Plan Area with a perceived over provision of 0.36 screens at 2009. It is then assumed that provision will increase by 7 screens at 2011 with the opening of the proposed Apollo cinema in Carmarthen which will lead to an over provision of 7 screens at 2011. The proposed 5 screen multiplex cinema at Martello Quays has not been included in this analysis. Its development would further increase the over-provision of cinema screens. There is therefore unlikely to be enough latent capacity to support additional facilities. However, although there appears to be little quantitative need for additional facilities there could be a qualitative need for a cinema if settlements are located over 20-30 minutes drive time away from existing facilities.

8.32 Appendix 5 shows where the existing cinema facilities are within the Spatial Plan Area. The proposed new multiplex cinema's at Carmarthen and Martello Quays has also been included on this map (on the assumption that the Pembroke Dock facility will come forward in the future). We have assumed an off peak drive times of 20 and 30 minutes for all existing cinemas within the catchment area and a maximum 30 minute drive time for the two proposed multiplex cinemas in Carmarthen and Pembroke Dock.

8.33 As can be seen, existing provision is relatively good. However, the settlements of Crymych, Newcastle Emlyn, Laugharne, Whitland and Pendine are not located within 20 minutes of a cinema and Narberth, St Clears and Newport are all on the very periphery of the 20 minute drive time. Given the rural character of the area, it is acknowledged that people will generally be willing to travel further to access leisure facilities. A drive time of 30 minutes has therefore been tested. This shows that whilst Crymych and Newcastle Emlyn still remain just outside /on the periphery of this drive time, all the other settlements are provided for.

8.34 The plan also shows the catchment of the two proposed multiplex cinemas. A 30 minute drive time has been estimated for these facilities on account of their size and appeal as destinations. The Martello Quays cinema catchment is expected to largely overlap that of Torch Theatre (Milford Haven), Royal Playhouse Cinema (Tenby) and Palace Cinema (Haverfordwest). Therefore, there is potential for the proposal to impact negatively on these facilities. The proposed Apollo Cinema in Carmarthen will overlap with that of the Lyric Theatre (Carmarthen) although it is likely to draw people into Carmarthen from a wider area. Overall, the two proposals will not serve a significantly larger catchment than the existing facilities although given that provision is relatively good for such a rural area this is not considered to be an issue.

8.35 In summary, there does not appear to be a quantitative or qualitative need for additional cinema facilities within the Spatial Plan Area.

Ten Pin Bowling

8.36 There are only two existing tenpin bowling facilities located within the Spatial Plan Area. These are Pheonix Bowl (10 lanes) at Milford Haven and Canaston Bowl (10 lanes) near Narberth.

8.37 The study area population (158,020 in 2009) is in theory capable of supporting 15-16 lanes based on one lane per 10,000 people. When comparing this with the existing provision of 20 lanes, there is an estimated surplus of 4-5 lanes at 2009. Therefore, there does not appear to be a quantitative need for additional bowling facilities within the Spatial Plan Area.

8.38 However, as can be seen from Appendix 5 there are large areas of the Spatial Plan Area which are a significant distance away from the existing facilities with provision skewed to the west. This, coupled with the fact that the area sees a significant increase in population over the summer months due to visitors, shows a potential qualitative need for additional facilities.

8.39 In terms of the hubs, the Haven Towns Hub is well catered for with ten pin bowling facilities. The deficit of provision is predominantly affecting the Fishguard and the Carmarthen Hubs. There are also no facilities in Cardigan.

8.40 We have estimated that approximately 40% of residents of the Spatial Plan Area live 20 minutes or more away from the existing facilities which is enough to support 6 lanes. However, when this is increased to 30 minutes the following settlements still remain beyond this catchment: Carmarthen, St Davids, Fishguard, Goodwick, Newport, Newcastle Emlyn, Laugharne and Pendine.

8.41 Whilst there does not appear to be a quantitative need for additional bowling facilities, given the number of settlements located over 30 minutes away from such a facility there would appear to be an argument of qualitative need. This need is centred around the Carmarthen and Fishguard Hubs. As such, given Carmarthen's role as the main retail and administrative centre it would appear that this would be the most appropriate location for additional ten pin bowling facilities.

8.42 This would still leave the north of the Spatial Plan Area underserved and as such, there could also potential to provide such a facility within Fishguard as a main town centre or outside the SPA in Cardigan if considered appropriate. However, a survey of existing usage which also assesses the leisure needs and wants of residents and the level of interest amongst operators should be undertaken in order to inform such a decision.

Theatre Locations

8.43 There are 5 theatres within the Spatial Plan Area and 1 theatre located within Cardigan which partially serves the northern sector of the SPA. Each of the hubs has 1 theatre with further facilities located in Tenby and Narberth. Although performing arts is usually the main function for these theatres, most have diversified to provide other services such as a cinema, live-music and cafés.

8.44 The existing theatres have been mapped in Appendix 5 and we have assumed a 20 and 30 minute drive time for each facility. The plans show that access to theatres is relatively good within the SPA with the only settlement falling outside a 20 minute drive time being St Davids although the settlements of Pendine, Crymych, Laugharne and Newcastle Emlyn are all on the periphery of this catchment. At 30 minutes no settlements are located outside the catchment area.

8.45 Although 30 minutes is a relatively long time to travel, it is considered that this is an acceptable situation in this rural area and that this level of provision would help to ensure the existing facilities remain financially viable. As such, there does not appear to be a significant need for additional theatre facilities within the Spatial Plan Area.

Leisure Centres and Swimming Pools

8.46 There are 8 leisure centres in the Spatial Plan Area and 1 in Cardigan with swimming pools and a further 7 (6 in the SPA, 1 in Cardigan) without a swimming pool, This therefore totals 14 leisure centres in the Spatial Plan Area and 2 in Cardigan which are available to the general public. There are 6 located within the Haven Towns Hub, 1 located within each of the Fishguard and Carmarthen Hubs and 1 centre located in each of the settlements of Tenby, Narberth, Newcastle Emlyn, St Clears, Crymych and St Davids.

8.47 There are 11 swimming pools within the Spatial Plan Area and 1 just outside the area in Cardigan. As mentioned above, 9 of these pools form part of a larger leisure centre with only 2 run as independent pools. Specifically, there are 5 pools within the Haven Towns Hub, 1 within the Carmarthen Hub and 1 within the Fishguard Hub. The remaining pools are located in the settlements of Crymych, Tenby, St Davids and Narberth. However, discussions are believed to be on going regarding the future of St Davids swimming pool.

8.48 Provision of both Swimming Pools and Leisure Centres is considered to be good with the majority of residents being able to access such facilities within 20 minutes or 30 minutes maximum for those in more isolated locations (Appendix 5).

8.49 The membership of existing facilities in Crymych, Haverfordwest, Fishguard, Milford Haven, Narberth and Pembroke has also been mapped (Appendix 5). This shows that facilities have a relatively wide catchment area and also reflects other patterns of behaviour such as places of work etc.

8.50 In the case of public Leisure Centres and Swimming Pool provision, it is evident that there is a complementary relationship between the existing facilities which work together to ensure a good level of provision to serve the needs of the local population within the Spatial Plan Area. It is considered that there is no significant need for additional public leisure facilities or swimming pools within the Spatial Plan Area at the current time.

Private Health & Fitness Centres

8.51 There are 10 private health and fitness clubs within the Spatial Plan Area. There are 3 clubs located in (or adjacent to) the Carmarthen Hub, 4 located within the Haven Towns Hub and a further 3 located in the settlements of St Clears, Newcastle Emlyn and Kilgetty. The only franchise within the Spatial Plan Area is Curves which operate 3 outlets in Carmarthen, Pembroke Dock and Haverfordwest. This is a women's only facility.

8.52 The locations of the clubs have been mapped in Appendix 5 and we have assumed a 20 minute drive time for each facility. As can be seen from the plan, there is a large area with no access to a health club within 20 minutes including the settlements of Fishguard, Goodwick, St Davids, Letterston and Newport. In total, it is estimated that approximately 29,550 (19%) people do not have access to this type of leisure facility within 20 minutes. Expanding the distance to 30 minutes drive still results in St Davids, Fishguard, Goodwick and Letterston falling outside the catchment area for these facilities. However, realistically, 20 minutes is considered a maximum drivetime to such a facility given that most members are likely to visit several times a week.

8.53 The national average membership of health and fitness clubs is approximately 12% which based on the existing population equates to approximately 19,000 places in the Spatial Plan Area in 2009. Assuming an average club membership of 1,000 (although this is considered high in this area) this would generate a demand for 19 clubs. Therefore, there is an assumed need for approximately 9 further clubs within the Spatial Plan Area. Moreover, the fact that 3 of the facilities in the area are for women only means that men are potentially losing out with provision appearing better than it necessarily is. Therefore, the underlying need could be for up to a further 10 such clubs. In addition to this evident quantitative need, there is also a qualitative need arising from the distribution of facilities and the large amount of the Spatial Plan Area that is not well served by private health clubs.

8.54 Private health club operators Energie Fitness Club and Fitness First have both expressed interest in operating within the Spatial Plan Area. Therefore, there is potential to attract additional (independent or multiple) privately run health and fitness clubs to the area.

8.55 If additional facilities are provided, they should be directed towards the Fishguard Hub in the first instance as this is where there is an apparent quantitative and qualitative need for such provision but not existing clubs. However, whether such a facility would be appropriate in this location, in terms of whether it would attract the number of members required to make it viable would need to be assessed. Some operator's, such as JJB fitness have rolling contracts and are cheaper at approximately £10 per month and therefore could be a more appropriate in Fishguard compared to more expensive operators such as David Lloyd.

Pubs and Restaurants

8.56 Pub and restaurant provision within the Spatial Plan Area is summarised in the table below:

Hub	Settlement	No. of Public Houses	No. of Restaurants	Total
Carmarthen	Carmarthen	46	18	**64**
Haven Towns	Haverfordwest	39	25	**64**
	Pembroke Dock	18	5	**23**
	Pembroke	14	5	**19**
	Milford Haven	19	10	**29**
	Neyland	3	1	**4**
Fishguard	Fishguard	10	5	**15**
	Goodwick	1	1	**2**
Other Settlements	St Davids	2	6	**8**
	Letterston	1	1	**2**
	Narberth	13	9	**22**
	Newport	4	4	**8**
	Crymych	2	0	**2**
	Newcastle Emlyn	10	2	**12**
	St Clears	5	3	**8**
	Laugharne	1	3	**4**
	Pendine	2	2	**4**
	Kilgetty	3	0	**3**
	Saundersfoot	4	6	**10**
	Tenby	18	21	**39**
	Whitland	5	2	**7**
	Johnston	1	1	**2**

Table 41 Pub and Restaurant Provision within the Spatial Plan Area

8.57 Each settlement has at least one public house. The settlement with the most public houses is Carmarthen (46) followed by Haverfordwest (39), Milford Haven (19), Pembroke Dock (18) and Tenby (18). For restaurants, Haverfordwest has the biggest selection at 25 followed by Tenby (21), Carmarthen (18) and Milford Haven (10).

8.58 Overall, the locations with the largest offer are Carmarthen and Haverfordwest which is likely to be due to their size relevant to the other settlements. Of the smaller settlements Tenby and Narberth have a good offer of places to eat and drink which is likely to be a reflection of their appeal as visitor destinations.

8.59 It is considered that there is a reasonable level of complementarity in the provision and supply of premises and facilities across the Spatial Plan Area.

Leisure and Complementarity

8.60 The evidence points to the dominance of the Haven Towns hub as the main leisure location within the Spatial Plan Area. This is set to increase further as the new leisure centre in Haverfordwest settles in and with the proposed development of Martello Quays development at Pembroke Dock and South Quay in Pembroke. However, this leisure provision is reflective of the size of the Hub which is substantially greater than the Carmarthen and Fishguard Hubs and the fact that it includes the five main towns.

8.61 There is a clear element of complementarity within the Haven Towns hub. Pembroke and Pembroke Dock complement each other with Pembroke offering a leisure centre and swimming pool and Pembroke Dock offering private health facilities. The new leisure proposals for these two settlements would further increase this complementarity and would enable them to develop into a strong leisure hub. A similar health provision is also provided to the north of the Milford Haven Waterway, together with a bowling alley, cinemas and a theatre and a wide range of pubs and restaurants. Following the recent opening of the new public leisure centre and reflecting its role as the dominant commercial and retail centre within the Hub, Haverfordwest is also the main leisure destination north of the Milford Haven Waterway. This role is, however, complemented by that of Milford Haven which also provides an overlapping and additional leisure offer.

8.62 Using Experian MMG3 it is estimated that approximately 60,670 people live within a 20 minute off-peak drive of Haverfordwest (equivalent to 38% SPA population) and 104,470 live within a 30 minute off-peak drive (equivalent to 66% of the SPA population). Therefore, the Haven Town Hubs dominance as a leisure destination would appear appropriate given the considerable population it serves both within the hub and in the wider area.

8.63 Despite its size and significance as the largest individual settlement within the Spatial Plan Area, the Carmarthen Hub has a relatively limited range of leisure facilities offering a combined cinema and theatre, leisure centre and a number of private health and fitness clubs. Whilst the proposed Apollo multiplex will improve provision it will not have a significant impact as it will essentially serve the same population as that of the Lyric Theatre although the quality of the provision will be improved and should therefore attract a limited number of visitors from further afield. Overall, leisure provision in Carmarthen should be improved to better meet the needs of residents and visitors alike and to reflect its role as the retail centre within the Spatial Plan Area.

8.64 Provision in the Fishguard Hub is similarly low and supports other evidence highlighted in this report that it is serving a limited role in the Spatial Plan Area and is not considered complementary to the other hubs and settlements. Consideration should therefore be given to how this might be addressed by way of an increased range and level of leisure provision so that the role of Fishguard and Goodwick might better reflect its hub status and particularly, better serve the needs of the local population in north Pembrokeshire.

8.65 There are various other leisure facilities located at the smaller settlements within the Spatial Plan Area. These facilities are complementary to the main concentrations of leisure facilities within the main town centres and as such are important in supporting the overall provision to the local population to the benefit of sustainability.

8.66 In conclusion, whilst large areas are underserved in terms of both quantitative and perceived qualitative need it is not evident that a substantial change in provision is required outside of the main hubs. Consideration must be given to whether the provision of additional facilities would be viable or deliverable in the context of this largely rural area. It is particularly important to establish whether such facilities could be sustained and supported to ensure their financial viability particularly as many leisure services are private sector led and as such require a strong market case before they locate.

8.67 It is advised that in order to get a clear understanding of the leisure facilities which are required and which would be supported in the Spatial Plan Area a leisure survey should be undertaken. This would be important in highlighting in more detail the level of quantitative need that exists across the Spatial Plan Area and also in pointing towards areas of qualitative need – for example in Carmarthen where the level of facilities does not presently appear to reflect the status of the town and towards the north of the Spatial Plan Area where the Fishguard Hub is not well served. Although some improvements in the level and range of leisure provision should be pursued, it is important to recognise that in this rural context, complementarity might be better achieved through an improvement in connections (so that people can access services more easily) rather than simply by providing new facilities.

9.0 # Public Services

9.1 The Wales Spatial Plan recognises the complementary roles of settlements in Wales for the delivery of public services and education and their importance in building sustainable communities. It emphasises the need to build effective partnerships between the public sector and local communities and highlights the importance of developing the skills and knowledge of the population in order to add to the quality of life as well as the standard of living and the working environment.

9.2 The provision of appropriate skills within the Pembrokeshire – The Haven Spatial Plan Area requires an understanding of the long-term economic and demographic trends of the region together with a strong and co-ordinated network of education and skills providers. The Wales Spatial Plan recognises the increased role that the Further Education and Higher Education sectors will play in the economy with regards to enterprise, new technology and the supply side of the labour market in Wales and the ways in which this will contribute towards the enhancement of the local economy and the delivery of the vision for a robust, sustainable, diverse and high value added economy.

9.3 The strength and vitality of communities within the Pembrokeshire – The Haven Spatial Plan Area is also dependant upon the provision of high quality, efficient and accessible health services. The Wales Spatial Plan states that the aim is to *'create a strong and well run network of streamlined and integrated care services'* (Wales Spatial Plan p.31). Achieving, then sustaining, the right level and location of health services across the Spatial Plan Area requires a balance to be struck between the distribution of services, their accessibility and their affordability.

9.4 This chapter provides an overview of the roles of and relationships between the key settlements and hubs in respect of public services provision by considering:

a The nature of the main health, education and emergency service facilities that exist within the Pembrokeshire Haven Spatial Plan Area;

b The distribution of public service facilities and their accessibility; and,

c The identification of service clusters and areas of deficit.

9.5 This analysis provides a detailed understanding of the relative roles of the key settlements in the provision of public services and education with the Haven Spatial Plan Area and considers how the distribution of service provision might help to satisfy anticipated future needs and improve the complementarity of settlements within the area.

Data Issues

9.6 A significant element of this chapter is a review of the relative distribution of public services across the Spatial Plan Area in order to identify both service clusters and areas of potential deficit. Locations of health care facilities and schools were sourced directly from Pembrokeshire and Carmarthenshire County Councils and the NHS Trusts. Locations for emergency service facilities were obtained directly from their respective bodies – Mid and West Wales Fire Service, Wales Ambulance Services NHS Trust and Dyfed Powys Police.

9.7 Further analysis of public services was derived largely from the Welsh Assembly Government's STATSWALES database. This was supplemented by data from other statistical databases such as the Health of Wales Information Service (HOWIS) and the NHS Information Centres for Health and Social Care. More subjective information was derived from the Pembrokeshire and Carmarthenshire Citizen Panels run by Dyfed-Powys Police, which canvasses public opinion on health care and emergency services across the Haven area.

9.8 Whilst the WAG STATSWALES data provided data focused on the Pembrokeshire – The Haven Spatial Plan Area, the majority of other data sources were at County level only. However, a review of drive time analysis and emergency service response times has enabled the production of maps that highlight the position of individual settlements across the Spatial Plan Area. The lack of direct data from settlement level has been taken into account throughout this chapter.

Health Services

9.9 Public services, particularly in terms of health care and emergency services, perform a unique series of essential roles and functions that must be available to all members of the population across the whole of the Pembrokeshire Haven area. Whilst it is clear that there is a need for a critical mass to support public services and facilities, access to primary health care services and emergency services are basic and fundamental requirements for any population, however sparsely distributed.

9.10 Primary health care is the term used for the activity of a health care provider who acts as a first point of consultation for all patients. Examples include GP services, dentistry services, ophthalmic services and pharmacy services. About 90% of all patient contacts with the NHS occur in primary care. Secondary health care is the service that is generally provided in or by general hospitals. It is usually provided by a specialist following a referral from a GP or other primary care practitioner. Travelling distances increase for patients receiving secondary care as the more specialised the services, the further people usually need and are prepared to travel for treatment. Finally, tertiary services are provided by specialist hospitals or regional centres equipped with diagnostic and treatment facilities that are not generally available at local hospitals. Referral is generally from a secondary care specialist. Tertiary care centres are generally located in areas of higher population density.

Hospitals

9.11 Hospitals generally serve a wide catchment, particularly in rural areas where one hospital will serve a dispersed population. Hospitals will provide acute and/or chronic medical care with larger hospitals also providing accident and emergency departments. For the majority of the population, it would be expected that there would be a hospital within a reasonable driving distance, particularly for A&E services for which easy access can be of critical importance.

9.12 The Pembrokeshire Haven Spatial Plan area is served by five main hospitals:

a Withybush General Hospital, Haverfordwest – includes A&E services;

b Tenby Cottage Hospital, Tenby;

c South Pembrokeshire Hospital, Pembroke Dock;

d St David's Hospital, Carmarthen; and,

e West Wales General Hospital, Carmarthen – includes A&E services

9.13 The map illustrating the distribution of the hospitals across the Pembrokeshire Haven area (Appendix 6) shows that the population in the north of the Spatial Plan Area, including St Davids, Fishguard and Newport, have the furthest distances to cover to get to their nearest hospital. The nearest hospital for populations in these settlements is either at Haverfordwest, or outside the Pembrokeshire – The Haven area, in Cardigan.

9.14 Statistics from the Welsh Assembly Government report the average driving distance for the population of the Pembrokeshire Haven area to a major acute hospital is 16.9km. This distance is nearly 2km higher than the average for Wales as a whole. Similarly, the average driving distance within the Pembrokeshire Haven area to an acute hospital is also 16.9km whereas the average for Wales as a whole is just 12.5km.

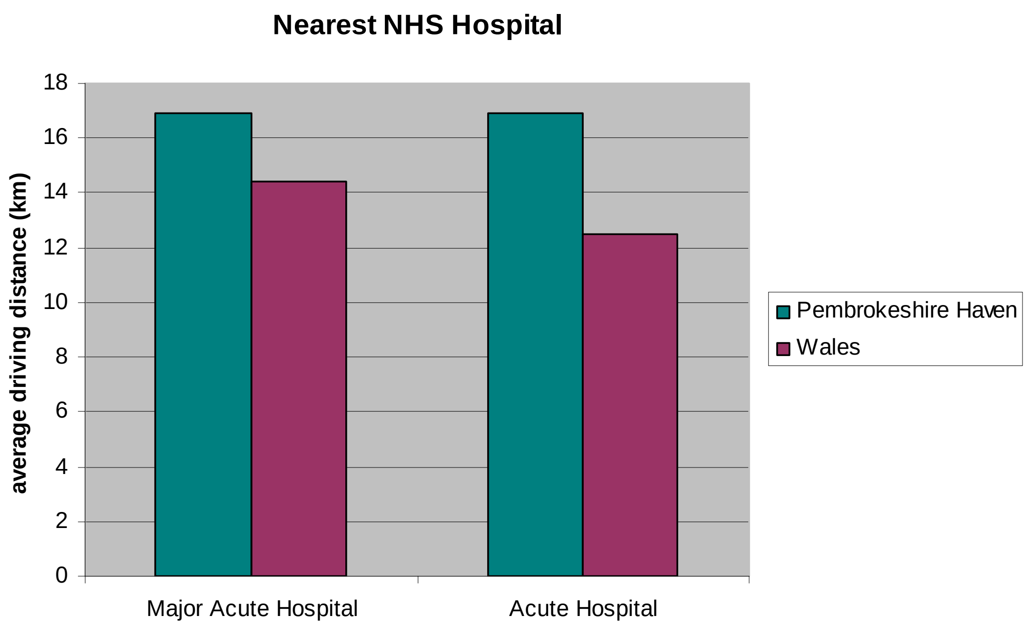


Fig 42 Average driving distance (km) to nearest NHS hospital

9.15 It is clear that there is a need for a critical mass to support public health facilities and therefore it is accepted that more rural locations will not be as conveniently located to the same number and range of services as more urbanised locations. However, in terms of accessibility, the rural population of Pembrokeshire – The Haven should not feel isolated from key public services. There is a need to create and maintain a strong transport infrastructure which improves the accessibility of more rural locations and better connects the network of settlements within the region.

9.16 In delivering public health services across the Spatial Plan Area, the aim should be to form a seamless network of complementary services between GP surgeries, health centres, specialist clinics and hospitals. Whilst the most cost effective option is to have a single point of access for all services, in practice, this is not the most convenient or accessible option for patients, particularly those located in more isolated and rural areas. The provision of local services within the community is preferential, though this is not usually the most practical or cost effective option. A balance must therefore be achieved between the needs of users and the various delivery issues that exist.

GP Surgeries

9.17 GPs provide ‘primary care’ as the first point of contact for most medical services. They ideally should be located within a neighbourhood scale to ensure households have easy access to their services.

9.18 Figure 43 below shows that the Pembrokeshire Haven area has slightly more NHS GPs servicing the area per 10,000 population than Wales as a whole. Overall provision at the regional level is therefore strong.

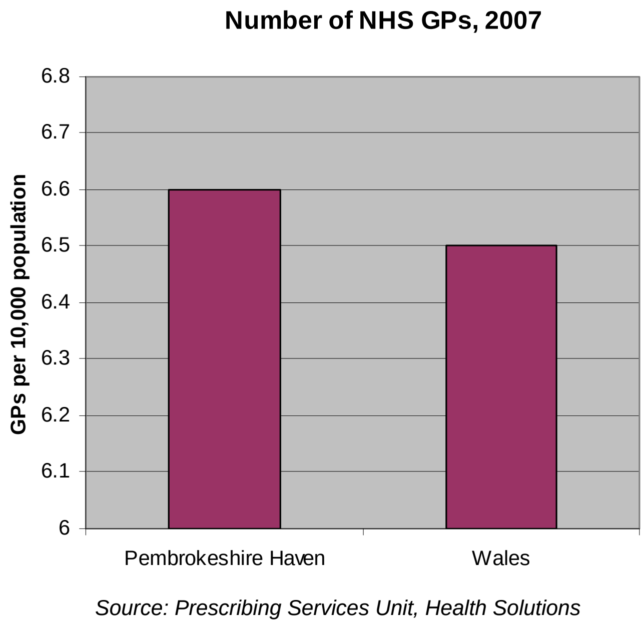


Fig 43 Number of NHS GPs within the Spatial Plan Area per 10,000 population

9.19 In terms of their actual distribution, GP surgeries together with Health Care Centres and Clinics are located in all the Primary Key Settlements and all the Key Settlements as well as a number of Local Centres such as Crymych, Saundersfoot, Kilgetty, St Davids and Newport. There are also a number of GP surgeries located in other areas not listed within the Wales Spatial Plan settlement hierarchy, which tend to be located between the larger settlements.

9.20 There are some notable areas without a GP surgery or Health Centre at the neighbourhood level, particularly with regards to some of the coastal areas and the countryside between Haverfordwest, Fishguard and Crymych. Figure 44 below shows that the average travel time to an NHS GP for the population of the Pembrokeshire Haven area is over 35 minutes, this is 17 minutes further than for the population of Wales as a whole. Nearly 60% of the Pembrokeshire Haven population lives more than 15 minutes travel time away from their nearest GP, compared with 40% of the Welsh population as a whole.

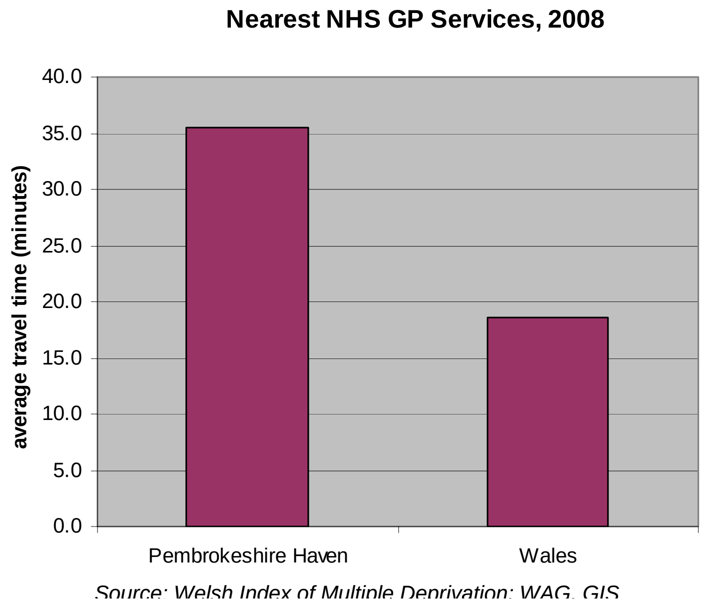


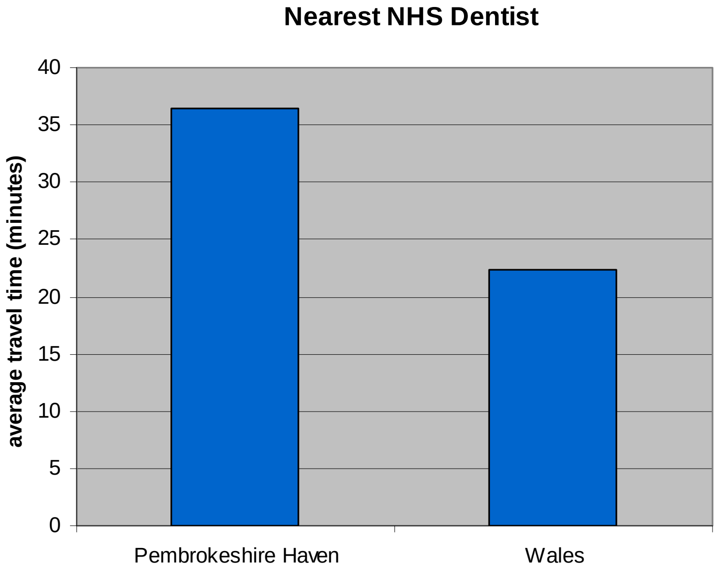
Fig 44 Average travel time to nearest NHS GP

9.21 Whilst the higher travel times for residents in the Pembrokshire – The Haven Spatial Plan Area are not unexpected considering the rural nature of much of the area, this data reinforces the need to ensure that adequate transport infrastructure and good public transport services are available in order to maximise accessibility to vital public services.

Dentists

9.22 Dentists provide oral care services and are not necessarily tied to a specific neighbourhood. Due to the lower frequency of visits when compared with GPs, dentists are often located further afield and not within a walkable distance.

9.23 Statistics from the Welsh Assembly Government report the average travel time to an NHS dentist for the population of the Pembrokeshire – The Haven area is 36.4 minutes and that over half the population live more than 20 minutes away from their nearest dentist. The average travel time for the population for Wales as a whole is 22.4 minutes with just 37.2% of the population living more than 20 minutes travel from an NHS dentist.



Source: Welsh Index of Multiple Deprivation; WAG, GIS

Fig 45 Average travel time to nearest NHS Dentist

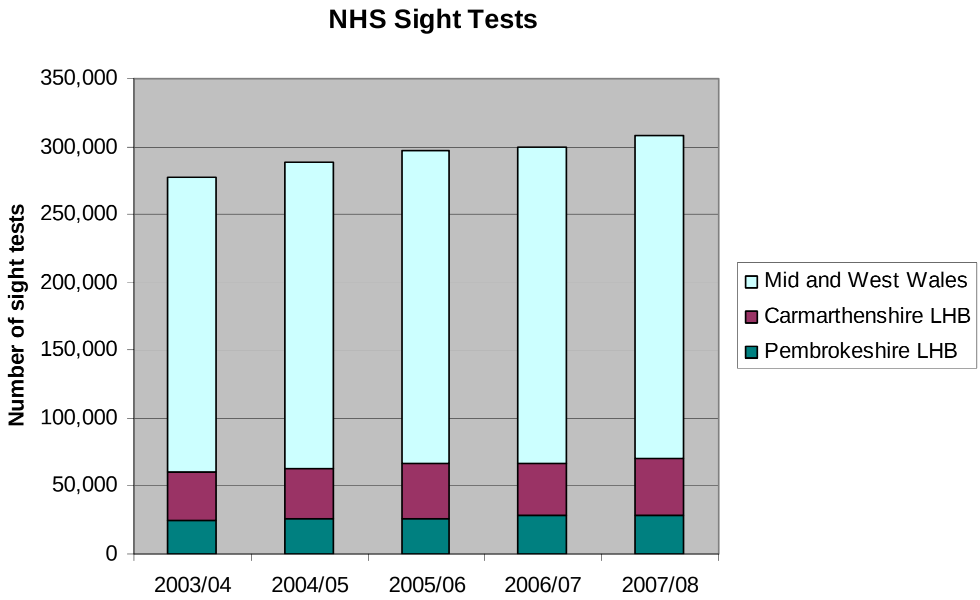
9.24 Whilst the increased travel distance for residents within the Pembrokeshire – The Haven area to their nearest NHS dentist compared with the Welsh average is not unexpected, the more pressing issue is the lack of NHS dentists available in the area. There are currently no dentists in Pembrokeshire taking on new NHS patients and patients requiring a NHS dentist are being placed on a waiting list until dentists become available. This has significant implications for potential new patients that are seeking dental treatment, particularly in the longer term as the population of the Spatial Plan Area and individual settlements is forecast to expand, establishing a further increase in demand for services.

9.25 Citizen Panel Surveys conducted in Pembrokeshire and Carmarthenshire assessing access to NHS dentists found that while almost two thirds of respondents said they did not have an NHS dentist, over three quarters of the sample study said they would like to have one (Survey 20, August 2007). This imbalance further highlights the need to consider options for an increase in local provision.

Ophthalmic services

9.26 Opticians usually work from High Street shops so it would be expected that the majority of opticians in the Pembrokeshire – The Haven area are located within town centres. Indeed, as the map shows the actual distribution of opticians across the study area (Appendix 6) is generally restricted to the Primary Key settlements and a number of Key settlements. Crymych is the only local centre that has an optician within its settlement boundary.

9.27 The chart below illustrates the numbers of NHS eye tests which have been carried out across Pembrokeshire and Carmarthenshire in comparison with the Mid and West Wales region over the last 5 years. The chart shows that the number of NHS eye tests being undertaken during the last 5 years has increased gradually, though this has been very marginal in Pembrokeshire and Carmarthenshire when compared with the region as a whole.



Source:- The NHS Information Centre for health and

Fig 46 Number of sight tests in Pembrokeshire, Carmarthenshire and Mid/West Wales

9.28 The graph below shows that more sight tests are carried out in Pembrokeshire per 100,000 of the population than in Carmarthenshire and also in comparison with Mid and West Wales and Wales as a whole. These high figures would often reflect a significant elderly population within an area as patients over 60 years and older generally account for the highest proportion of NHS sight tests across the population (NHS Information Centre, 2009). However, in Pembrokeshire, only 34% of sight tests carried out in 2007/08 were on patients of 60 years and over, compared with figures closer to 50% for the population of Carmarthenshire, Mid & West Wales and indeed Wales as a whole.

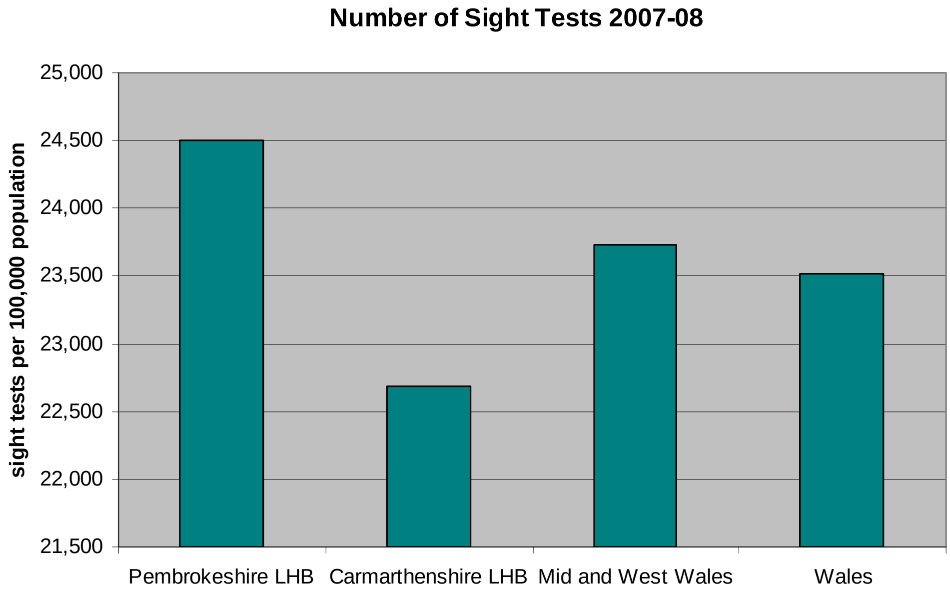


Fig 47 Number of sight tests in Pembrokeshire, Carmarthenshire, Mid/West Wales and Wales per 100,000 population

9.29 The relatively high number of Pembrokeshire residents accessing ophthalmic services when compared with other regions in Wales suggests that the rurality of the Spatial Plan Area does not act as a barrier to accessing this type of health facility. However, without a breakdown of actual address points for people attending sight tests, such a conclusion cannot be made with complete conviction. Indeed, it is entirely possible that certain sectors of the population or those located in particular areas of the region do not access these services or have difficulties accessing these services.

9.30 Nevertheless, when the location of health services are restricted to the larger settlements within the region, good public access from across the Spatial Plan Area to these areas becomes increasingly important. This is particularly the case when a significant proportion of those accessing such services are over 60 years and older and are therefore subject to possible greater mobility difficulties.

Pharmacies

9.31 Pharmacists operate within a commercial environment and have often been regarded as a peripheral provider by many in the healthcare professions when compared with a GP. However, community pharmacies continue to expand into the delivery of primary healthcare services and their services include:-

a Dispensing and repeat dispensing;

b Disposal of medicines;

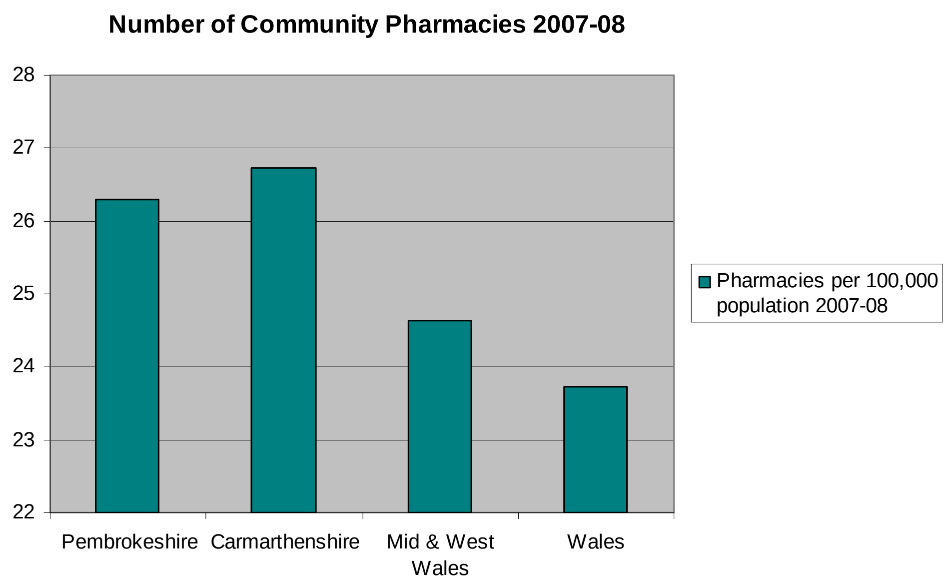
c Health screening;

d The treatment of minor ailments;

e Provision of health advice; and,

f Signposting for patients to other healthcare provision.

9.32 There are approximately 43 pharmacies in the Pembrokeshire Haven area which are in contract with Local Health Boards. As demonstrated by Figure 48 below, the number of pharmacies per 100,000 of the population is actually higher across Pembrokeshire and Carmarthenshire than in the Mid and West Wales region and Wales as a whole. Nevertheless, the actual distribution of pharmacies across the study area is generally restricted to the Primary Key settlements and Key settlements.



Source: Health of Wales Information Service

Fig 48 Number of Community Pharmacies in Pembrokeshire, Carmarthenshire, Mid/West Wales and Wales per 100,000 population

9.33 A Citizen Panel Survey conducted in Pembrokeshire which assessed respondents awareness of the range of services that local pharmacists provide found that 87% of respondents would like to see their pharmacist further develop their provision of primary healthcare services to include such facilities as a minor ailments service e.g. coughs and colds (Survey 1, 2005).

Patient Choice

9.34 A major expansion of patient choice in the NHS got under way in April 2008 in England. The new arrangements mean that patients in England that are referred to see a specialist can choose where they will be treated and they can choose from any hospital that meets NHS standards. Patient Choice Surveys carried out by the Department of Health have consistently shown that patients want choice in terms of the treatment they receive and the hospital within which they are treated (Department of Health, 2009).

9.35 Since devolution, the NHS in Wales has been a responsibility of the Welsh Assembly Government. In contrast to England which has implemented "patient choice" in booking elective treatment, the Welsh Assembly Government has stated that it will give patients a greater say in their services, with a focus on "patient voice". When the proposals for increased Patient Choice in England were first discussed by the Labour Government five years ago, First Minister Rhodri Morgan stated that Wales did not have the same need for choice in the NHS as in England and that both the geography and its social values mean patients in Wales need not be given the same level of consumer choice in health.

9.36 Guidance in England on patient choice suggest a number of reasons for patients not wanting to be treated by their nearest health facility including a preference to be treated away from home but closer to their family, concerns regarding waiting lists, cleanliness and reputation and even the level of good parking facilities. Citizen Panel Surveys conducted in Pembrokeshire and Carmarthenshire highlighted concerns for people regarding the difference in expertise/resources at local hospitals and accessibility and transport issues in attending appointments.

9.37 Increased patient choice across Wales could have a major impact on the numbers being treated at particular hospitals in the Pembrokeshire – The Haven Spatial Plan Area with some patients deciding to have treatment outside the area, whilst patients located in Ceredigion or the east of Carmarthenshire may prefer to be treated within the Spatial Plan Area. The level of patient choice available is clearly related to resources in terms of the capacity of particular hospitals and the expertise available. However, improved patient choice is a clear trend which is occurring across the rest of Britain as policy and guidance aims to give the public a bigger hand in shaping local care systems in terms of how, when and where patients receive treatment. Depending upon the ways in which this element of health policy develops in Wales, further consideration would need to be given to the implications upon the level and distribution of service provision across the Spatial Plan Area.

Complementarity of health provision

9.38 Reflecting the need for an adequate critical mass of population to support health services, the focus of provision within the Spatial Plan Area is upon the main settlements. As a result of this distribution and given the scale and rural character of the area, average distances to hospitals, GP surgeries and dentists are all above the Welsh average. As in other rural areas, this raises issues regarding the provision of services to those living in the most isolated areas.

9.39 However, it is apparent that there is a reasonable level of complementarity between the hubs – especially between the Haven Towns and Carmarthen Hubs which have a similar provision of facilities and also with the Fishguard Hub which, despite not having a hospital does offer a range of primary care facilities. In the context of issues relating to the need to ensure the viability of services, it is considered that the distribution of health facilities across the Spatial Plan Area is broadly appropriate although further detailed research should be undertaken to inform policy decisions in respect of the potential need for additional facilities, particularly GP and dental surgeries.

9.40 In the context of this pattern of service provision, ensuring a high quality transport infrastructure will be vital to ensuring that people can access services quickly and easily. As set out below, in some cases, this might be of life-saving importance.

Emergency Services

9.41 The Mid and West Fire and Rescue, Dyfed-Powys Police and Wales Ambulance Services NHS Trust (Central and West Region) are the emergency service providers in the study area. Although separate services, they aim to deliver an integrated service.

9.42 The map showing the distribution of the Fire Stations, Police Stations and Ambulance Stations across the Pembrokeshire – The Haven Spatial Plan Area (Appendix 6) indicates there are a series of service clusters which mirror the settlement hierarchy within the Wales Spatial Plan, with fire, police and ambulance stations largely concentrated in the Primary Key Settlements and Key Settlements.

9.43 All of the Primary Key Settlements within the Wales Spatial Plan – Carmarthen, Haverfordwest, Milford Haven/Neyland and Pembroke/Pembroke Dock have a police station, fire station and ambulance station located within their main urban areas. The Tier 2 Key Settlements of Tenby, Fishguard and Whitland also have each of the main emergency service stations within their settlement boundaries such that this full range of provision is available in each of the hubs. Narberth and St Clears each have a police station, although only Narberth has a fire station located within the settlement. No ambulance stations are provided below the tier 2 hierarchy of settlements but a reasonable distribution of police and fire stations exists across the Local Centres.

9.44 Whilst the Emergency Services do not necessarily provide a service that is locationally specific, the Ambulance Service and Fire and Rescue Services have response time targets based on driving times. Policing is undertaken at various levels from countywide to neighbourhood policing teams and community support police officers and is generally less locationally specific.

9.45 The Central and West Regional Ambulance Service response time targets are 8 minutes for Category A calls (emergencies - which are immediately life threatening) and 19 minutes for all other emergency calls (Category B or C emergencies - which are not life threatening). Ambulance services are expected to reach 75% of Category A calls within 8 minutes, which means that areas within an 8 minute drive time isochrone of an ambulance station will be very well served. Ambulance services are expected to reach 95% of Category B or C emergencies emergency calls within 19 minutes. There is no distinction between urban and rural response targets.

9.46 The map in Appendix 6 sets out the actual performance of different ambulance stations across the Spatial Plan Area. It shows that, despite the rural nature of much of the Pembrokeshire Haven area, coverage by the ambulance service is generally strong with just the fringe coastal areas and remote countryside being outside the target response times of the existing ambulance stations.

9.47 Pembrokeshire County is served by nine fire stations, including three stations with full time and retained elements at Haverfordwest, Milford Haven and Pembroke Dock. Retained stations are located at Fishguard, St Davids, Narberth, Tenby and Crymych. A group of volunteers crew a first response fire engine on Caldey Island. The Carmarthenshire Command includes 11 fire stations, 6 of which are located within the Spatial Plan Area. Of these, Carmarthen is the only day crewed station and this station also includes a retained complement. Retained Stations are located at Kidwelly, Pontyates, Newcastle Emlyn, Llandysul, and Whitland. The table below sets out the key details relating to each fire station within the Spatial Plan Area.

9.48 It shows that the Primary Key Settlements have day crewed facilities with full-time fire fighters as opposed to retained crews only. Retained fire fighters are not full-time but are on-call to respond to a range of emergencies.

Carmarthenshire Command

Command	Station	Crew Level	Settlement Tier	Co-Responder Unit
Carmarthenshire	Carmarthen	Day Crewed	1	
	Whitland	Retained	2	
	Newcastle Emylyn	Retained	3	√
	Llandysul	Retained	n/a	√
	Kidwelly	Retained	n/a	
	Pontyates	Retained	n/a	
Pembrokeshire	Haverfordwest	Day Crewed	1	
	Milford Haven	Day Crewed	1	
	Pembroke Dock	Day Crewed	1	
	Fishguard	Retained	2	
	Narberth	Retained	2	√
	Tenby	Retained	2	
	St Davids	Retained	3	
	Crymych	Retained	3	√
	Caldey Island	Volunteer	n/a	
Ceredigion	Cardigan	Retained	n/a	√

Table 42 Fire Station facilities within the Spatial Plan Area and Ceredigion

9.49 Fire and Rescue response time targets are 15 minutes, which means that areas within a 15 minute drive time isochrone of a fire station will be very well served. As can be seen from the map in Appendix 6, there is a reasonable coverage of service across the Spatial Plan Area, with the more remote countryside or coastal areas predictably having a lower level of coverage, the further they are located from the main settlements.

9.50 A partnership between the Mid and West Wales Fire Service and the Wales Ambulance Trust has provided a number of 'Co-responder' teams to provide specialist emergency resuscitation for casualties in support of the normal ambulance response. The purpose of the Co-responder initiative is to improve primary response times through a community based service, particularly with regards to reaching remote areas. Co-Responder units are currently located at the fire stations at Narberth, Crymych, Newcastle Emlyn, Llandysul and Cardigan.

9.51 The maps show the Co-responder units (Appendix 6) have been strategically placed to provide additional coverage in areas most remote from ambulance stations. An expansion of this system may be one of the most feasible methods of improving emergency service coverage across the Haven area. For example, the provision of a Co-responder unit at St David's Fire Station will enhance coverage to the far west of Pembrokeshire.

Complementarity of emergency services

9.52 It is evident that a good level of complementarity exists in respect of the level of emergency service provision within the main hubs, all of which provide a full range of services. These main facilities are complemented by additional units in smaller settlements, including retained fire services and co-responder units. These are important in helping to enhance the overall level of coverage of provision. Perhaps unsurprisingly, however, given its size and rural character, the required response times are not met for some parts Spatial Plan Area although, whilst improvements should be pursued (for example, through the enhancement of retained fire services and the expansion of the co-responder scheme), a good level of complementarity exists.

Education

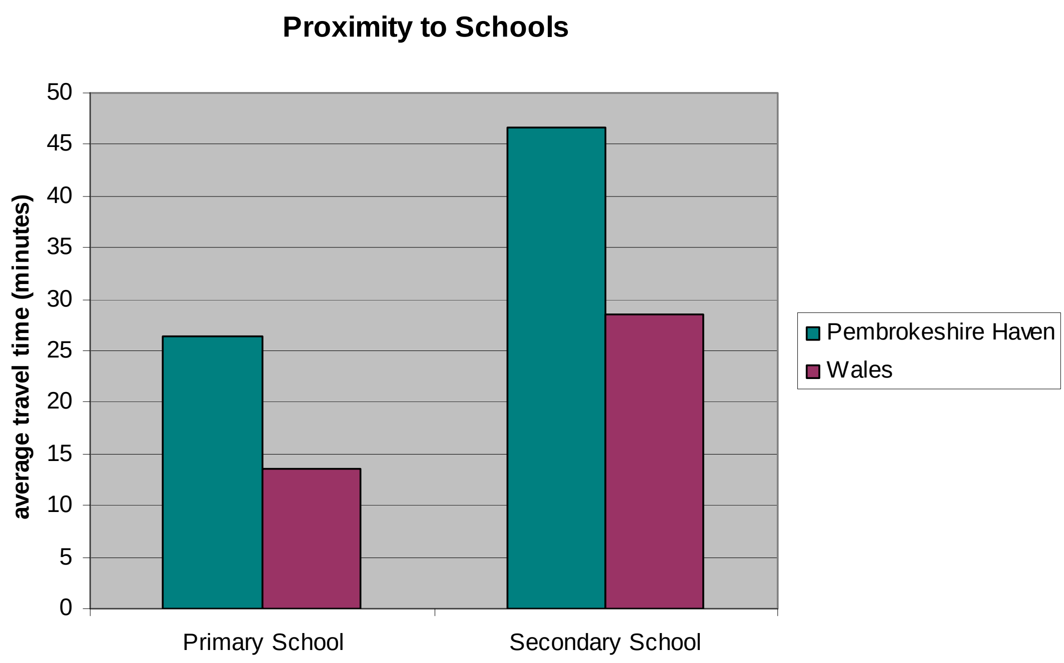
9.53 Within the Pembrokeshire – The Haven Spatial Plan Area there are 128 primary schools, 12 secondary schools and 2 special schools maintained by Pembrokeshire and Carmarthenshire County Councils. These provide education for more than 25,800 pupils.

9.54 As can be seen from Figure 49 below, the distribution of primary schools across the Spatial Plan Area is fairly evenly dispersed throughout the area from the Primary and Key Settlements down to the Local Centre and neighbourhood level. In terms of secondary schools, there are 8 schools located in Pembrokeshire and 4 in the west of Carmarthenshire. There are also two Special Schools located in the Haven area, one within Haverfordwest and one in Johnstown, near Carmarthen.

9.55 Six of the secondary schools are located within Primary Key Settlements, at the Key Settlement level whilst the Local Centres of Crymych, Newcastle Emyln and St Davids also have secondary schools. Narberth and St Clears are the only Key Settlements without a secondary school. The nearest school to these settlements is Whitland, although pupils are also likely to attend secondary schools in Haverfordwest and Carmarthen respectively.

9.56 The map in Appendix 6 relates the distribution of 'school age' children as a percentage across the Spatial Plan Area. It is clear that a proportionally large number of children (between the ages of 4 and 16) live in the more rural areas, outside the main settlements. Access and travel time to primary and secondary schools is therefore a key issue.

9.57 Statistics from the Welsh Assembly Government show that the average travel time to the nearest primary school for the Pembrokeshire Haven population is 26.4 minutes, 12.9 minutes further than the Welsh average and that almost 40% of the local school-age population lives more than 15 minutes away from their nearest primary school, double the average for Wales



Source: Welsh Index of Multiple Deprivation; WAG, GIS

Fig 49 Average travel time to primary and secondary schools

9.58 Whilst it is predictable that the distance to the nearest secondary school is further than that to the nearest primary school for the majority of people, the graph above again demonstrates that residents in the Pembrokeshire – The Haven area have much further to travel on average than residents in Wales as a whole. The average travel time to a secondary school for the population of the Haven area is 46.7 minutes compared with an average of 28.5 minutes for Wales as a total. Almost 50% of address points in the Haven area live more than 30 minutes away from a secondary school, this is double the Welsh average.

9.59 With longer distances, it is far less likely that pupils will be able to walk or cycle to school and many pupils will therefore be reliant on public transport, specific school buses or being driven by car. Whilst there are no specific figures on travel modes to school relating to the Pembrokeshire Haven area, the Welsh average has between 35-40% of pupils walking to school, 35-40% of pupils being taken by car to school and approximately 20% of pupils taking the bus. Due to the longer distances travelled by pupils in the Spatial Plan Area, it would be likely that the number of pupils being taken by car to school or using buses will be much higher than in more urbanised locations. Bus use in particular for accessing schools is generally higher in rural areas as schools are required to make provision for pupils to access the school without the need to rely on parents to drive them.

School Capacity

9.60 The primary school pupil/teacher ratio in the Pembrokeshire – The Haven Spatial Plan Area is 19.4, which is only slightly below the Welsh average figure of 19.9. The pupil/teacher ratio for secondary schools in the Pembrokeshire Haven Spatial Plan Area is slightly above the Welsh average – 16.9 compared to an average of 16.5 (STATSWALES, 2008). This, together with our analysis of the distribution of schools shows a reasonable supply and accessibility of provision of both primary and secondary schools in the Spatial Plan Area.

9.61 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.

9.62 The Pembrokeshire 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.

9.63 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.

9.64 Some surplus places are often necessary and welcomed by schools to enable them to cope with fluctuations in numbers of pupils, but excessive numbers of unused places mean that resources are tied up unproductively. In areas where there is a large surplus of school places, communities can find that local schools are under threat of amalgamation or closure. Schools operating at well under their capacity often find that the situation also has a negative effect on grant funding which is required to maintain and improve schools buildings and facilities for pupils. This is an issue that needs to be addressed within the planning of the education system at all levels.

Further Education

9.65 In the Pembrokeshire – The Haven Spatial Plan Area, there is one Higher Education facility – Trinity College in Carmarthen and one Further Education college– Pembrokeshire College located in Haverfordwest (HERO, 2009). There is also a Further Education college campus in Cardigan (Coleg Ceredigion), with its partner campus being located in Aberystwyth. Both Further Education colleges run Higher Education courses for students (Pembrokeshire College is an accredited college through the University of Glamorgan). All three education facilities largely serve the South West Wales region although all facilities have small EU and overseas student populations. In addition to these higher and Further Education institutions, there are also a number of smaller community learning and education centres across the Spatial Plan Area that run adult education courses.

9.66 In examining the numbers of students on Further Education or Higher Education courses within the Pembrokeshire – The Haven area, it can be seen from the table below that the proportion of students on particular types of courses are comparable to those figures for Wales as a whole. However, there is a clear variation between the numbers of Higher Education postgraduates and undergraduates for the Spatial Plan Area when compared with the same figures for Wales.

Further education data	**2006-07 academic year**	***2006-07 academic year: Wales***
% of learners on full-time courses	15.9%	*17.2%*
% of learners on part-time courses	79.3%	*77.3%*
% of learners on work-based learning	4.8%	*5.5%*

Higher education data	**2006-07 academic year**	***2006-07 academic year: Wales***
% of enrolments on postgraduate courses	13.9%	*20.6%*
% of enrolments on undergraduate courses	81.5%	*70.9%*
% of enrolments on further education courses	4.6%	*8.5%*

Source: STATWALES, 2009

Table 43 Composition of Further and Higher education courses

9.67 This variation may reflect differences in the number and levels of postgraduate and undergraduate courses in Higher Education institutions within the Spatial Plan Area or it may provide a reflection of wider demographic differences in the region. Wales as a whole has suffered in the past from a ‘brain drain’ where following their education in Wales, graduates and post graduates leave for employment elsewhere. This is particularly an issue in more rural areas where a lack of suitable jobs at graduate or post-graduate level can impact both on the provision of course types and levels and the number of students enrolling on such courses in the area.

9.68 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 also to 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.

9.69 The presence of Further and Higher Education institutions, particularly in small towns can bring significant benefits to a local community. Many local residents may be employed by the institution, many businesses will cater primarily to the college or university, and the students' population will sometimes outnumber the local population within term time. Trinity College in Carmarthen has recently received University status, which it will hope to boost its status within Wales for prospective students.

9.70 Pembrokeshire – The Haven's Higher and Further Education institutions need to continue to compete with their counterparts across the rest of Wales and the UK in both holding onto local talent and in attracting new talent to the area.

Complementarity of education provision

9.71 Although travel distances to schools are above the Welsh average, there is a clear complementarity between settlements and hubs in the provision of primary and secondary education facilities and also between Carmarthen and Haverfordwest in the provision of Higher and Further Education services. 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.

9.72 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 the continued quality and availability of education services.

Conclusions

9.73 Overall, most social infrastructure types such as schools and health facilities have a reasonable level of provision across the Pembrokeshire – The Haven Spatial Plan Area, particularly within larger settlements where there is often a level of choice, as there is a sufficient population to justify their viability. Some of the smaller settlements lack elements of basic social infrastructure, although this is a common problem for rural communities where some services cannot be feasibly supported by the community that they serve. To this end, it is evident that there is clear complementarity between the Primary Key and Key settlements and between the three hubs in respect of public services. The availability of smaller services within the local centres add to this overall picture of complementarity and helps to support the role of the main service centres so as to maximise the availability of facilities to the benefit of local communities.

9.74 Key local services provide a crucial role within local communities and are important in supporting the viability and sustainability of settlements at all levels. As such, they are important in helping to minimise the need for travel and ensure vital and viable neighbourhoods. However, it must be realised that there is a need for a critical mass to support such services.

9.75 The ongoing aim is to improve access to public health and educational services, particularly for those in the more sparsely populated locations. Establishing and maintaining a strong transport infrastructure and improving the interconnections within the Spatial Plan Area is key to this as is ensuring that existing public services work in tandem to one another, in order to strengthen the complementarity of the region.

10.0 Transport

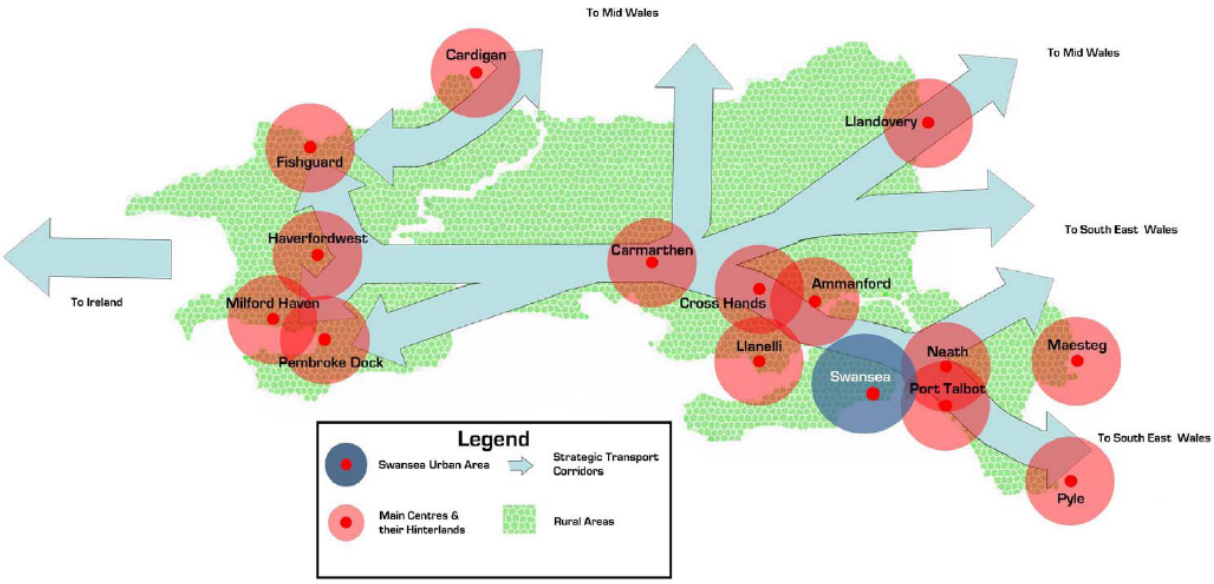
10.1 In many respects, transport can be viewed as having the ability to effectively create or eliminate barriers to complementarity. The complementary relations that exist between settlements will necessitate the movement of people between centres – and in particular, towards the Primary Key Settlements and the Carmarthen and Haven Towns Hubs which will form the basis for many complementary relationships. However, the promotion of smaller settlements and the enhancement of their role as local employment, retail, leisure or public service centres would be important in supporting more sustainable travel patterns so that people do not need to travel long distances for low-order items that should be available more locally. In addition, accessibility between the Spatial Plan Area and wider markets is essential to supporting the economic and employment roles and functions of particular settlements to develop a network of complementary settlements in the wider geographical context.

10.2 The purpose of this chapter is to consider the transportation issues that link the various complementarity themes together. It sets out a range of key issues relating to current transport facilities, identifies proposed enhancement schemes and considers the way in which transport services and infrastructure might strengthen or undermine complementarity.

Existing Transport Networks

10.3 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' identified below 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. The Trunk Roads Forward Plan (2008) prioritises improvements to key strategic road routes through Wales. 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 success of these ports in order to maximise their economic and employment potential. Whilst existing networks are considered here by mode of transport, the complementarity between different networks must also be considered.

10.4 The 'main' centres identified in Figure 50 are used as the basis for analysis of journey times to nearest 'main' centre by both private car and bus.



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

Fig 50 Regional Transport Plan vision for transport network

10.5 Maps in Appendix 7 show the existing public and private transport networks in Pembrokeshire – The Haven.

Road

The Existing Road Network

10.6 The National Transport Plan for Wales was issused for consultation by the Welsh Assembyl Government in July 2009 and identifies the A40 and A477 as being the primary road links in South West Wales providing access to the ferry docks in Pembroke Dock and Fishguard. The A40 is the main strategic east-west and north-south route within the Spatial Plan Area with the A477 also providing strategic connections to the 'tourism hub' The A487 and A40 provide further trunk road connections to the north and east of the Spatial Plan Area respectively.

Estimated Travel Times by Private Car

10.7 Estimated travel times by private car indicate that Haverfordwest is best linked to the other hub settlements; this is unsurprising its location at the heart of the Pembrokeshire. The impact of the A40 and A477 trunk roads is illustrated by the low travel times for the distance between Haverfordwest and the following hub areas:

a Fishguard Hub;

b Haverfordwest and Pembroke / Pembroke Dock within the Haven Towns hub; and,

c Carmarthen Hub.

10.8 However, the Milford Haven waterway acts as a barrier to road travel between north and south as travel times between Pembroke/ Pembroke Dock and Fishguard / Goodwick are relatively long in relation to the distance travelled. The location of the trunk roads means that travel times between Fishguard/ Goodwick and Carmarthen are longer whilst connections through to Milford Haven and Neyland mean these towns are less well connected to Carmarthen than the rest of the Haven Towns Hub.

Destination / Origin	Milford Haven	Neyland	Pembroke	Pembroke Dock	Carmarthen	Fishguard	Goodwick
Haverfordwest	10.7km (14mins)	9.8km (18mins)	14.8km (29mins)	12.4km (26mins)	45.8km (49mins)	21.4km (25mins)	22.5km (26mins)
Milford Haven		5.3km (12mins)	9.3km (24mins)	6.5km (21mins)	52.0km (59mins)	31.5km (41mins)	32.5km (42mins)
Neyland			5.4km (13 mins)	2.6km (10 mins)	46.9km (57 mins)	31.1km (41 mins)	32.3km (42 mins)
Pembroke				3.0km (9 mins)	45.9km (48 mins)	35.8km (52 mins)	37.1km (53 mins)
Pembroke Dock					47.1km (52 mins)	33.6 km (49 mins)	34.8km (49 mins)
Carmarthen						48.0km (68 mins)	49.6km (68 mins)
Fishguard							1.7km (3 mins)

Source: www.multimap.com

Table 44 Estimated Journey Times by Private Car Between Main Hub Settlements

10.9 The following data looks at the travel times between the main centres identified in the Regional Transport Plan and settlements in their potential sphere of influence. Some smaller settlements are included more than once where they are roughly equidistant from more than one main centre.

Origin	St Clears	Newcastle Emlyn	Crymych	Whitland	Laugharne	Pendine
Destination						
Carmarthen	12.0km (14 mins)	22.8km (50 mins)	26.5km (63 mins)	21.3km (24 mins)	14.1km (25 mins)	21.0km (36 mins)

Table 45 Travel times between Carmarthen and its hinterland

10.10 Road connections between Carmarthen and its hinterland vary. Whilst the A40 provides fast links through to St Clears and Whitland, journeys take longer on the A roads connecting through to Crymych and Laugharne / Pendine and the A484 to Newcastle Emlyn.

Origin	Narberth	Kilgetty	Saundersfoot	Tenby	Whitland	Pendine	St David's
Destination							
Haverfordwest	15.7km (19 mins)	19.3km (31 mins)	21.2km (42 mins)	23.4km (46 mins)	24.6km (25 mins)	29.2km (50 mins)	22.1km (45 mins)

Origin	Narberth	Kilgetty	Saundersfoot	Tenby	Whitland	Pendine
Destination						
Milford Haven	21.9km (31 mins)	21.9km (37 mins)	22.7km (41 mins)	22.9km (42 mins)	31.0km (37 mins)	32.7km (58 mins)

Origin	Narberth	Kilgetty	Saundersfoot	Tenby	Whitland	Pendine
Destination						
Pembroke Dock	18.0km (30mins)	16.3km (21 mins)	16.8km (25mins)	16.5km (26 mins)	26.6km (36 mins)	27.1km (41 mins)

Table 46 Travel times between the Haven Towns and its hinterland

10.11 Despite many smaller settlements being roughly the same distance from more than one main centre in the Haven Towns hub, this information shows how road networks can have a significant influence on travel times and travel patterns. Narberth is both closest and has the quickest road links with Haverfordwest. Similarly, Kilgetty, Saundersfoot and Tenby and Pendine are both closest and have the quickest road links with Pembroke Dock. Whilst Whitland is only slightly closer to Haverfordwest than Pembroke Dock the A40 provides a much quicker connection to Haverfordwest.

Origin	St David's	Lettersto	Newport
Destination			
Fishguard	23.5km (43 mins)	7.5km (9 mins)	10.3km (13 mins)

Table 47 Travel times between Fishguard and its hinterland

10.12 Letterston and Newport are both close to and well connected by road with Fishguard. It is only slightly quicker to travel from St Davids to Fishguard than to Haverfordwest by private car. This highlights that connections to St Davids are poor, with a journey time of 43 minutes to the closest hub settlement. However, given the range of facilities within Fishguard, those living within St Davids are more likely to travel to Haverfordwest.

Origin	Newcastle Emlyn	Crymych	Newport
Destination			
Cardigan	13.9km (31 mins)	12.6km (26 mins)	13.8km (24 mins)

Table 48 Travel times between Cardigan and its hinterland within the Spatial Plan Area

10.13 Some settlements are closer to Cardigan in Ceredigion than main centres in Pembrokeshire or Carmarthenshire. Travel by car to Cardigan is quicker from Newcastle Emlyn than to Carmarthen whilst Cymych is similarly better connected with Cardigan than Carmathen. Likewise, Newport is better connected with Fishguard than Cardigan.

Traffic Count Data

10.14 In this section, traffic count data is used to develop an understanding of movement between key settlements in Pembrokeshire – The Haven. The location of the various traffic count sites is shown in Appendix 7 which summarises the peak eastbound and westbound flows in the morning and afternoon and compares the average weekday flows with those recorded on a Saturday. WAG traffic count data has only been collected on the Trunk Roads (i.e. the A40 and A477) and so this analysis is therefore limited to flows between Carmarthen, St Clears, Whitland, Narberth, Haverfordwest, Fishguard and Pembroke Dock. In addition, traffic count sites do not always correspond with the exact point of exit and entry from particular settlements.

a **Carmarthen**- Sites 1 and 2 have higher traffic flows than any of the other sites, this is unsurprising given that these are the only two sites located on the dual carriage way (the A40 and A48) within the Spatial Plan Area. During weekday mornings, peak flows were recorded at 8am westbound at site 1 and eastbound at site 2 have peak flows. Whilst traffic flows on Saturday are generally high, the peak traffic westbound on both roads between 11:00 and 13:00 may reflect trips to retail / leisure centres to the east of the Spatial Plan Area such as Swansea and Cardiff.

b **Haverfordwest** - At sites 4-7, the weekday morning peak flow was recorded westbound between 08:00 and 09:00 reflecting the commuting rush to the employment centre of Haverfordwest. This corresponds with an eastbound weekday evening peak flow at 17:00. Similarly site 8 immediately to the north of Haverfordwest has a peak southbound flow at 08:00-09:00 and north bound flow at 16:00-17:00. On Saturdays a particularly high flow can be identified at site 7 moving eastbound towards Haverfordwest at 10:00-11:00 and 13:00-14:00. This is likely to reflect shopping and leisure journeys.

c **A40 between Carmarthen and Haverfordwest** – This stretch of the A40 generally has higher peak traffic flows during the week and weekend than the A40 between Haverfordwest and Fishguard. Site 7 is particularly busy during the working week at 08:00-09:00 westbound and 17:00-18:00 eastbound, perhaps reflecting extra commuting traffic joining and leaving the A40 from the A4075 and A4115. Saturdays shows similar peak flows between 10:00 -14:00.

d **A40 between Haverfordwest and Fishguard –** Peak traffic flows at site 9 are significantly lower than site 8 suggesting the A40 becomes less busy moving north away from Haverfordwest. Peak traffic flows are similar northbound and southbound during the week, although significant peak flows can be identified moving southwards towards Haverfordwest at 10:00-11:00 and 12:00-13:00 on Saturdays.

e **A477 between St Clears and Pembroke Dock** – Although peak flows along the A477 are not quite as high as around sites 6 and 7, they are similar to sites 3, 4 and 5 on the A40. During the week, the highest peak traffic flows are at site 12, westbound at 08:00-09:00 and eastbound at 16:00-17:00 presumably reflecting commuting traffic to and from Pembroke Dock. On Saturdays peak traffic flows are between 11:00 and 13:00. The highest peak flows are westbound at sites 10 and 11.

The Cleddau Toll Bridge

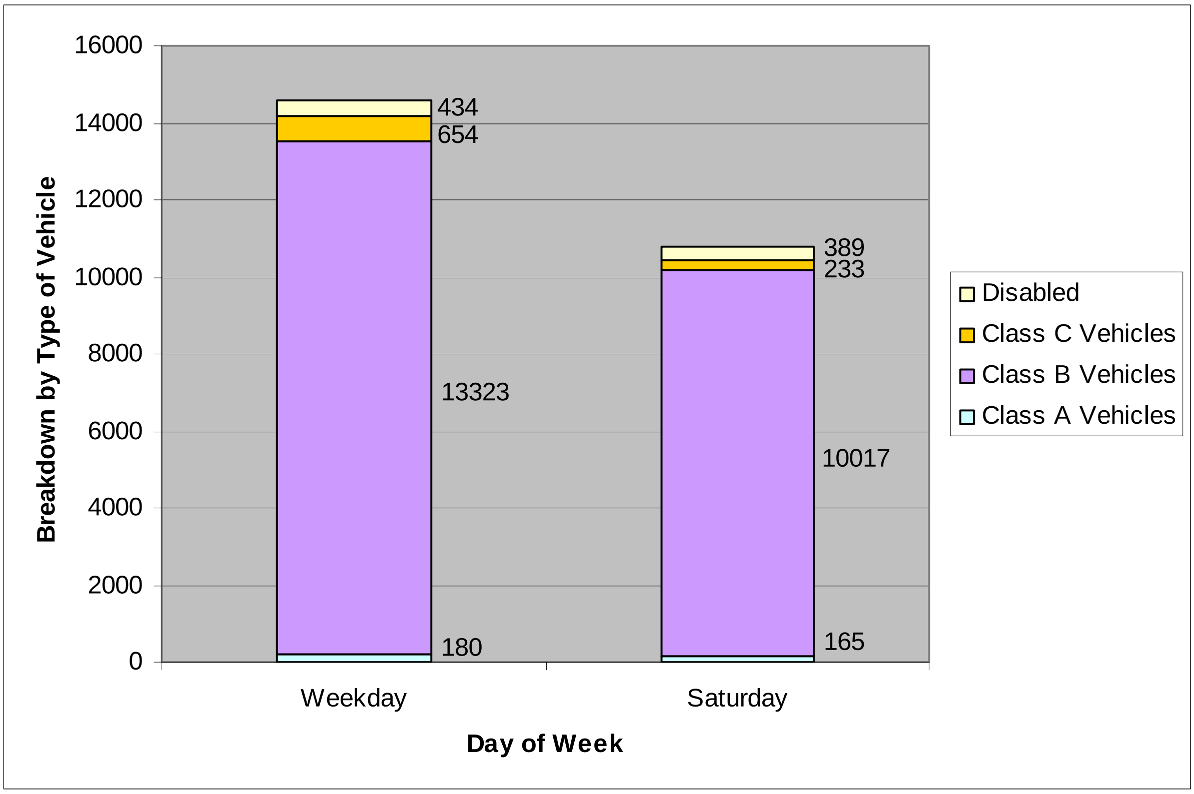
10.15 The Cleddau Toll Bridge is on the A477 and is the only direct road connection between Pembroke Dock and Neyland and, on a larger scale, between the northern and southern parts of Pembrokeshire. The toll charges for crossing the bridge are set out below; pre-paid tickets for classes A and B provide a 20% discount.

Class of Vehicle	Toll Charge
Class A - Motor cycles & 2 wheel trailers	35p
Class B - Cars, Caravans & small 4 wheel trailers	75p
Class C - Vehicles over 2 tonnes	£1.50
Concessions – People claiming Disability Living Allowance, War Pension or Registered Blind People	Free

Table 49 Price Schedule for Cleddau Toll Bridge

10.16 14,590 vehicles cross the bridge on a typical weekday compared to 10,803 on a Saturday. A lower number of vehicles cross the bridge on Sundays than on Saturdays.

10.17 Although we cannot identify the type of vehicle for concessionary crossings the graph below clearly indicates that Class B vehicles (cars, caravans and small 4 wheel trailers) are by far the main type of vehicle using the bridge constituting 91-93% of vehicle traffic over the bridge. The bridge is used by a significant number of freight vehicles (over 2 tonnes), although a far greater number use the bridge on a weekday compared to the weekend.



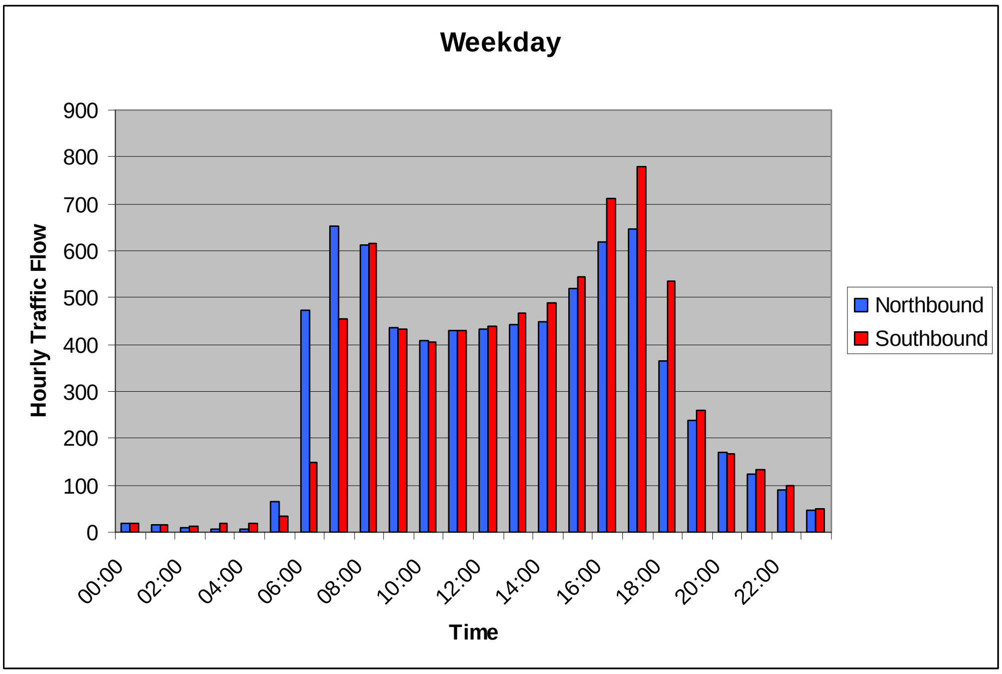
1. Class A - Motor cycles & 2 wheel trailers; Class B - Cars, Caravans & small 4 wheel trailers; Class C - Vehicles over 2 tonnes; Disabled concessions are free crossings for individuals who receive the higher rate of living allowance with a mobility supplement.

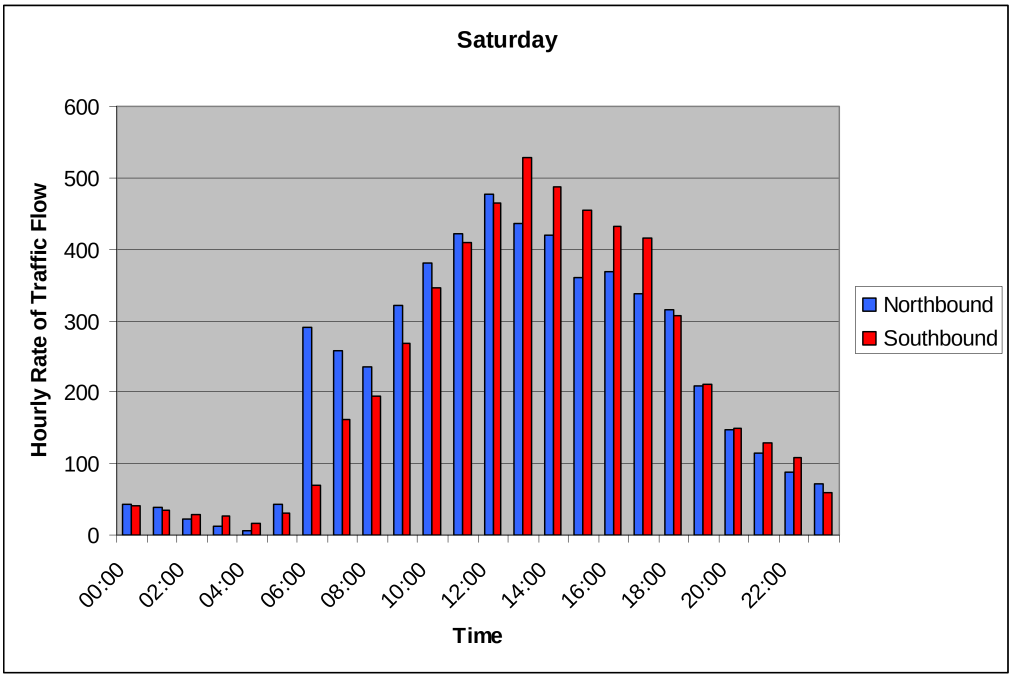
Source: Cleddau Toll Bridge

Fig 51 Average weekday and Saturday crossings derived from data for May 2008 (excluding Bank Holiday on 26/05/09 from weekday figures).

10.18 The times for peak traffic across the bridge are very different on a weekday to a Saturday. There are two times for peak traffic flow on weekdays between 07:00 to 09:00 and 16:00 to 18:00, coinciding with the main commuting period. By contrast, on a Saturday there is reasonably high flow from 10:00 to 18:00 which peaks around 13:00, reflecting leisure and shopping trips.

10.19 On both weekdays and Saturdays the numbers of vehicles travelling northbound and southbound are broadly comparable. However, between 06:00 to 13:00 the number of northbound vehicles exceeds southbound vehicles; this is reversed between 13:00 to 18:00. The direction of traffic flow on weekdays reinforces previous findings about the significance of Haverfordwest as the key employment centre within the Haven Towns Hub. On Saturdays the direction of travel could partly be attributed to employment patterns, but is also likely to reflect Haverfordwest's dominance as a retail centre. In the longer term, it might be that as Pembroke Dock is further enhanced as an employment and retail centre and Pembroke and Pembroke Dock are developed into a key leisure hub, these patterns of movement might be subject to change.





Source: Cleddau Toll Bridge

Fig 52 Average weekday and Saturday crossings derived from data for May 2008 (excluding Bank Holiday on 26/05/09 from weekday figures).

Public Transport

Rail

10.20 Rail networks form part of the multi-modal strategic transport corridor connecting Pembrokeshire – The Haven with Swansea, Cardiff, Bristol and London to the east. To the east of the Spatial Plan area the 'Heart of Wales' line runs from Llanelli/ Swansea through East Carmarthenshire on to Shrewbury (where connections run to Mid and North Wales) and Birmingham New Street. Main line services run through to Whitland and Carmarthen from Milford Haven/Haverfordwest and Fishguard, with an additional passenger service running via Tenby from Pembroke Dock.

10.21 The following services run during the working week between key destinations and Carmarthen and / or beyond (Swansea, Bridgend, Cardiff) in both directions:

a Fishguard – 2 times a day to co-ordinate with passenger ferry crossings to Rosslare, Ireland;

b Milford Haven/ Haverfordwest – 11 or 12 times a day; and,

c Pembroke Dock – 9 or 10 times a day.

A further 10 services run eastbound from Carmarthen.

10.22 On Sundays the rail services are more limited key destinations and Carmarthen and / or beyond (Swansea, Bridgend, Cardiff) in both directions:

a Fishguard – 2 times a day to co-ordinate with passenger ferry crossings to Rosslare, Ireland;

b Milford Haven/ Haverfordwest – 6 times a day; and,

c Pembroke Dock – 3 times a day with an additional service to Tenby only.

A further 4-6 services run eastbound from Carmarthen.

10.23 The rail network in Pembrokeshire – The Haven therefore connects the Carmarthen, Haven Towns and Fishguard hubs with each other and provides national connectivity with the rest of Wales and through to key destinations in England. In addition, it also provides strategic passenger connections through to the coastal resorts of Tenby and Saundersfoot and Fishguard harbour as well as freight routes along the economic corridor to and from the industrial port areas of Milford Haven, Pembroke Dock and Fishguard Harbour.

Bus

10.24 The following analysis examines the frequency of bus services between hub settlements and between the main centres and nearby tier 2 and 3 settlements (see Appendix 7). In the interests of consistency the number of services has been calculated from those running Monday to Fridays, during term times over the winter period.

10.25 Analysis suggests that connections within hubs are better than those between hubs. Only Haverfordwest in the Haven Towns Hub has a regular bus service to Fishguard (14 times a day) and has the most regular bus service to Carmarthen (6 times a day). Passengers are therefore expected to change buses in order to travel through to other Haven Town settlements and Goodwick.

10.26 Within the Haven Towns Hub bus services are most frequent between Haverfordwest and Milford Haven (30-32 times a day) and between Pembroke and Pembroke Dock (30-32 times a day). However, relatively regular bus services run between all the Haven Towns (at least 9 a day). Fishguard and Goodwick are well connected by bus with services running around 30-32 times a day.

Destination	Haverfordwest	Milford Haven	Neyland	Pembroke	Pembroke Dock	Carmarthen	Fishguard	Goodwick
Origin								
Haverfordwest	N/A	30	16	16	16	6	14	0
Milford Haven	32	N/A	10	10	10	1	No Direct Service	No Direct Service
Neyland	15	9	N/A	13	13	3	No Direct Service	No Direct Service
Pembroke	15	9	12	N/A	32	3	No Direct Service	No Direct Service
Pembroke Dock	15	9	12	30	N/A	3	No Direct Service	No Direct Service
Carmarthen	6	No Direct Service	3	3	3	N/A	No Direct Service	No Direct Service
Fishguard	14	No Direct Service	No Direct Service	No Direct Service	No Direct Service	No Direct Service	N/A	32
Goodwick	1	No Direct Service	No Direct Service	No Direct Service	No Direct Service	No Direct Service	30	N/A

Table 50 Number of bus services between hub settlements

10.27 Outside of the hubs, there are regular services to and from all the settlements in the Spatial Plan Area for which Carmarthen might be considered to be the main centre with the exception of Crymych. Direct bus links between Carmarthen and Crymych are limited to one service a month.

	St Clears	Newcastle Emlyn	Crymych	Whitland	Laugharne	Pendine
Carmarthen - Origin	21	9	Limited Service	10	16	8
Carmarthen - Destination	24	9	Limited Service	10	21	10

Table 51 Number of bus services between Carmarthen and surrounding settlements

10.28 As shown below, Haverfordwest represents the main transport interchange within the Haven Towns Hub, offering a large number of daily services to surrounding, smaller settlements. Services from Pembroke Dock are more limited, with 3 or 4 busses each day between the town and each of Kilgetty, Tenby and Saundersfoot. However, there are no direct bus links between Milford Haven and any of the smaller settlements.

	Narberth	Kilgetty	Saundersfoot	Tenby	Whitland	Pendine	St David's
Haverfordwest - Origin	17	13	10	24	3	No Direct Service	12
Haverfordwest - Destination	17	13	11	24	3	No Direct Service	13

	Narberth	Kilgetty	Saundersfoot	Tenby	Whitland	Pendine
Milford Haven - Origin	No Direct Service	No Direct Service	No Direct Service	No Direct Service	No Direct Service	No Direct Service
Milford Haven - Destination	No Direct Service	No Direct Service	No Direct Service	No Direct Service	No Direct Service	No Direct Service

	Narberth	Kilgetty	Saundersfoot	Tenby	Whitland	Pendine
Pembroke Dock - Origin	No Direct Service	4	3	3	No Direct Service	No Direct Service
Pembroke Dock - Destination	No Direct Service	4	3	4	No Direct Service	No Direct Service

Table 52 Number of bus services between the Haven Towns and surrounding settlements

10.29 There are regular bus services from Letterston and Newport to Fishguard (14 or more a day). Whilst bus services are reasonably regular from St Davids to Fishguard, St Davids is better connected with Haverfordwest by bus.

	St David's	Lettersto	Newport
Fishguard - Origin	6	16	16
Fishguard - Destination	5	15	14

Table 53 Number of bus services between Fishguard and surrounding settlements

10.30 Both Newport and Newcastle Emlyn have regular bus services running to and from Cardigan; indeed Newcastle Emlyn is better connected to Cardigan by bus than it is to Carmarthen. Fairly regular services run from Crymych to Cardigan, again providing a better bus connection to Cardigan than to Carmarthen.

	Newport	Crymych	Newcastle Emlyn
Cardigan - Origin	12	4	18
Cardigan - Destination	14	5	18

Table 54 Number of bus services between Cardigan and surrounding settlements

Public Transport Travel Times

10.31 The following tables detail the estimated time it would take to travel by public transport between each of the key settlements. Data for morning, afternoon and evening on a Tuesday and Saturday was analysed. It was not possible to make the journey between some settlements as certain times. Saturday morning and Tuesday night were selected to represent peak and off-peak services as they were the times when the most and least journeys (respectively) were possible between settlements.

10.32 Comparisons shows a large difference in the number of journeys that can be made and the time taken to complete journeys by public transport between peak times (represented by Saturday morning) and off-peak times (represented by Tuesday evening). On Saturday morning, out of a total of 361 journeys it was estimated that 72% could either be completed on the Saturday morning whereas they could not be completed on the Tuesday evening or took less time to complete than on a Tuesday evening.

a **Travel Times Between Hubs** – Overall, Haverfordwest is the best connected of the Haven towns to the Fishguard and Carmarthen Hubs by public transport. The Fishguard Hub exhibits the poorest public transport connections and travel times to the other hub areas. With the exception of Haverfordwest all other journeys between hub settlements take longer than one hour. Whilst it is possible to travel from other hub settlements to Fishguard on a Tuesday evening, it is not possible to travel outbound to hub settlement from Fishguard or Goodwick at this time. Although public transport journey times from Carmarthen are over one hour this suggest relatively good public transport links with the other hubs considering the distances involved.

b **Travel Times within Hubs –** Journeys between the Haven Towns by public transport generally take less than one hour. However, public transport journeys from Milford Haven to Neyland, Pembroke and Pembroke Dock and from Neyland to Milford Haven on a Tuesday evening take over one hour, a much longer time than the same journeys on a Saturday morning. Neyland exhibits poor connectivity with the Pembroke Dock / Pembroke area as estimated journey times by public transport are long for such a short distance. Public transport connections over the short distance between Fishguard and Goodwick are 10-12 minutes and the journey could be completed on a Tuesday evening suggesting off-peak provision is good.

Destination	Haverfordwest	Milford Haven	Neyland	Pembroke	Pembroke Dock	Carmarthen	Fishguard	Goodwick
Origin								
Haverfordwest	N/A	31	35	44	44	54	50	70
Milford Haven	34	N/A	26	45	45	65	85	105
Neyland	34	23	N/A	34	24	69	109	129
Pembroke	63	52	37	N/A	12	73	137	158
Pembroke Dock	51	46	26	8	N/A	84	126	146
Carmarthen	69	89	99	106	109	N/A	129	X
Fishguard	42	92	74	92	84	92	N/A	12
Goodwick	50	107	80	107	90	107	10	N/A

1. Travel times are given in minutes

2. X Denotes where it was not possible to make the journey by public transport at that time

Source: WAG Regional Transport Planning Department Transport Modelling

Table 55 Bus travel times between hub settlements (peak time: Saturday am)

Destination	Haverfordwest	Milford Haven	Neyland	Pembroke	Pembroke Dock	Carmarthen	Fishguard	Goodwick
Origin								
Haverfordwest	N/A	35	30	50	40	54	39	85
Milford Haven	35	N/A	60	80	70	65	70	125
Neyland	34	104	N/A	29	19	119	84	114
Pembroke	39	39	X	N/A	14	87	119	X
Pembroke Dock	39	39	X	12	N/A	96	119	X
Carmarthen	60	80	X	74	84	N/A	170	X
Fishguard	X	X	X	X	X	X	N/A	12
Goodwick	X	X	X	X	X	X	12	N/A

1. Travel times are given in minutes

2. X Denotes where it was not possible to make the journey by public transport at that time

Source: WAG Regional Transport Planning Department Transport Modelling

Table 56 Bus travel times between hub settlements (off-peak time: Tuesday evening)

c **Travel Times Between main centres and surrounding settlements –** St Clears, Whitland and Laugharne have reasonable (under one hour) travel times by public transport to and from Carmarthen and with services allowing the journey to be completed both ways on a Tuesday evening. By comparison public transport journey times between Carmarthen and Newcastle Emlyn and Crymych are much longer with limited services to and from Crymych.

	St Clears	Newcastle Emlyn	Crymych	Whitland	Laugharne
Carmarthen - Origin	29 *24*	60 *65*	89 *X*	39 *30*	39 *39*
Carmarthen - Destination	18 *32*	68 *63*	X *X*	27 *26*	44 *39*

Top line: peak travel times (Saturday am)/ bottom line: off-peak travel times (Tuesday evening)

Table 57 Bus travel times between Carmarthen and surrounding settlements

10.33 Whilst public transport journeys are shorter between Narberth and Haverfordwest than the other Haven Towns centres; off-peak between Narberth and the three largest Haven towns are not good. Journey times from Kilgetty and Saundersfoot to Haverfordwest and Pembroke Dock are similar although Saundersfoot is served by a limited number of busses which might make it difficult to complete journeys to the three centres at off-peak times. Whitland has similar public transport journey times to Haverfordwest as to Carmarthen.

10.34 Milford Haven is not as well connected with the surrounding smaller settlements as Haverfordwest and Pembroke Dock, as a result many of the journey times by public transport take over one hour.

	Narberth	Kilgetty	Saundersfoot	Tenby	Whitland	St David's
Haverfordwest - Origin	35 *X*	55 *100*	55 *X*	64 *90*	34 *34*	47 *47*
Haverfordwest - Destination	26 *X*	47 *56*	58 *93*	72 *57*	26 *31*	58 *X*

	Narberth	Kilgetty	Saundersfoot	Tenby	Whitland
Milford Haven - Origin	59 *X*	75 *130*	85 *X*	65 *120*	45 *45*
Milford Haven - Destination	76 *X*	80 *69*	95 *93*	102 *57*	58 *55*

	Narberth	Kilgetty	Saundersfoot	Tenby	Whitland
Pembroke Dock - Origin	94 *X*	54 *56*	56 *X*	44 *46*	66 *76*
Pembroke Dock - Destination	69 *X*	45 *49*	55 *73*	56 *37*	79 *76*

Top line: peak travel times (Saturday am)/ bottom line: off-peak travel times (Tuesday evening)

Table 58 Bus travel times between the Haven Towns and surrounding settlements

10.35 Public transport journey times from St David’s, Letterston and Newport to Fishguard all take less than one hour. However, poor services from St David’s and Letterston may make the journey difficult to complete at off-peak times. Journey times by public transport are similar to Fishguard from St David’s as they are to Haverfordwest although it would appear that the off-peak service is not as good.

	St David's	Lettersto	Newport
Fishguard - Origin	50 *X*	32 *X*	28 *25*
Fishguard - Destination	51 *X*	29 *18*	28 *24*

Top line: peak travel times (Saturday am)/ bottom line: off-peak travel times (Tuesday evening)

Table 59 Bus travel times between Fishguard and surrounding settlements

Barriers to Complementarity

10.36 The preceding analysis has provided a broad overview of the relative accessibility of different hubs and settlements by road and by public transport. 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,

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.

10.37 In the context of the vision for complementarity which 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 existing barriers.

10.38 In this section, we consider some of the key barriers that exist to complementarity and set out the ways in which they might impact upon the development of complementary relationships across the Spatial Plan Area.

Road

10.39 The structure and location of the trunk road network is such that travel times between the Carmarthen and Fishguard / Goodwick hub by private car are comparatively long for the distance between them. There are also relatively long travel times over short distances between the Haven Towns.

10.40 The road network is such that journey times from tier 2 and 3 settlements to one main centre may be considerably shorter than another, regardless of the distance between them. This could potentially influence travel patterns leading to preference for one main centre over another, making it more difficult for these main centres to perform complementary functions. For example, St Davids particularly exhibits long travel times by private car to the nearest main centre; this may act as a barrier to some of its residents accessing services which are not available within St David's itself.

A40

10.41 Road traffic data indicates that the A40 eastbound from Carmarthen and between Carmarthen and Haverfordwest has higher traffic flows than the other trunk roads within the Spatial Plan Area. Traffic flows into Carmarthen from both the east and west are highest between 08:00 an 09:00 and leaving Carmarthen 16:00 and 18:00, although this section of the A40 is dualled. Along the single carriageway stretch, the A40 is busiest at Canaston where again peak flows are highest at rush hours reflecting commuting flow in and out of Carmarthen. Traffic data therefore indicates some pressure points long the A40 which require further investigation and the potential identification of appropriate solutions in order to increase capacity.

10.42 The need for action to address this barrier to complementarity is particularly evident in the light of an awareness of the perceived economic implications of congestion along the road. The A40 is seen as a barrier by many of the larger businesses, such as the Port Authority, as it is seen to work against business opportunities by acting as an unnecessary burden which prevents high level investment. It is considered by many businesses that dualling the A40 would help to eradicate this barrier and enable them to promote their businesses more successfully to potential investors. However, it is understood that the Welsh Assembly Government does not consider there is any justification for this at present. The justification (or otherwise) of enhancements to the A40 should be a matter of continued review and assessment.

Cleddau Toll Bridge

10.43 The Cleddau toll bridge (managed by Pembrokeshire County Council) provides a valuable link between Neyland and Pembroke Dock, saving a journey of approximately 57km. Data from the toll bridge indicates the bridge is well used, particularly providing an important commuter link Monday to Friday. However, high usage at peak times results in modest queuing on both directions between 7-9am and 4:30 to 6:30 pm Monday to Friday.

10.44 Although the toll is relatively low at 75p for cars and vans and £1.50 for heavy goods vehicles it acts as a psychological barrier for some and as such a potential asset to complementarity has become an obstacle to some. In the light of this, a balance should be drawn between the benefits of removing the toll for vehicles (all the time or at certain times) against the likely impact in terms of increased levels of congestion that might result from any subsequent increase in the level of usage of the bridge. Whilst the removal of a toll would help to increase complementarity within the Spatial Plan Area, it would generate a number of financial and other disbenefits which would need to be carefully appraised.

Congestion Problems

10.45 High levels of commuting into Haverfordwest and Carmarthen puts pressure on the local road system. The Pembroke Road connecting Burton and Haverfordwest is the busiest non-classified road in Pembrokeshire whilst the Merlin's Bridge Roundabout, which provides the only real route into Haverfordwest from the south, is the main congestion problem in Haverfordwest.. It will be important to identify and implement any necessary steps so as to prevent this pressure point from undermining the attractiveness of Haverfordwest or its ability to serve the Haven Towns Hub and the wider area.

10.46 Other pressure points have also been identified, including the junction between the A4139 and Ferry Lane in Pembroke Dock. Again, it will be important to quantify the severity of this problem and to consider the various ways in which an improvement might be achieved.

Milford Haven & Pembroke Dock Road Networks

10.47 Connectivity to the employment land around the Haven including the power stations is poor. In particular, neither Milford Haven nor Pembroke Dock are considered to have the road networks suited to the heavy freight traffic associated with the new LNG terminals. Improving access to these sites is considered essential to provide employment opportunities, particularly to retain and attract young people to the area. There have been calls for a bypass road to be built in order to stop the HGV's using these unsuitable roads although financial support is needed to enable these improvements to happen.

Traffic Management in Tenby and Saundersfoot

10.48 Given the high numbers of tourists around this area in peak season parking and traffic management have been identified as key issues. Furthermore, whilst Tenby and Saundersfoot are both served by fairly regular train services, Saunderfoot station is over 2km from the town centre which could act as a barrier to rail usage. The combination of these two issues could limit the potential of these resorts by undermining their accessibility for tourists.

Public Transport

Rail

10.49 The rail network provides important strategic connections both with and within the Spatial Plan Area. Whilst it's geographical coverage includes the hubs and most of the tier 1 and 2 settlements Neyland and Goodwick are only covered by the nearby stations of Milford Haven and Fishguard harbour respectively and St Clears does not have a station. If there was potential to extend the rail network to St Clears in particular it would ensure more comparable access between settlements of the same tier. With the exception of the coastal resorts of Saundersfoot and Tenby and nearby Kilgetty, none of the other tier 3 settlements (local centres) are directly served by train services, thereby limiting access to the key settlements by public transport to bus services and hence restricting the potential for their complementarity.

10.50 The infrequency of particular services is also a barrier to complementarity. Whilst there are regular train services to Milford Haven / Haverfordwest and Pembroke Dock, a twice a day service each way to Fishguard Harbour means it has limited connectivity with the remainder of the Spatial Plan Area, particularly as one of these two services leaves and departs Fishguard during the night in order to meet the ferry to Rosslare. Furthermore, there is a marked contrast between the frequency of services Monday to Friday and at weekends which serves to restrict accessibility and the establishment of more complementary relationships.

10.51 Additionally whilst not currently limiting services west of Swansea, a pinch point on the rail line between Gowerton and Loughor could restrict the future capacity for a greater number of services to run west bound to Carmarthen and Pembrokeshire – The Haven and therefore limit its ability to achieve complementary relationships with the wider area.

Bus

10.52 Buses provide better intra-hub services than inter-hub services. Haverfordwest has the best intra-hub connections of the Haven Towns and passengers from the other Haven towns may therefore have to changes buses at Haverfordwest. Passengers from Goodwick would similarly have to change at Fishguard.

Haverfordwest has bus connections with both Carmarthen and Fishguard whereas there is no direct service between these two hubs.

10.53 Tier 2 and 3 settlements are generally are best connected by bus to their closest main centre, with limited connections to other main centres. However, the exception to this is the settlements of Kilgetty, Tenby and Saudersfoot which have more frequent bus connections with Haverfordwest than Pembroke Dock. Milford Haven has the least frequent inter-hub bus services and no direct connections to any of the nearby tier 2 and 3 settlements.

10.54 At least 8 services a day are provided in each direction between most tier 2 and 3 settlements and a main centre. The exception to this is Crymych which has only 4-5 services a day to Cardigan and infrequent services to Carmarthen.

10.55 Whilst good quality bus services can be important in helping to promote complementary relationships between hub settlements and surrounding towns and villages, limitations in the existing provision might serve to undermine this positive relationship. Within the context of the need to ensure that services are viable and sustainable, consideration should be given to the potential improvement in routes and the frequency of services so that closer integration could be achieved between the hub settlements and the surrounding settlements that rely upon them for a wide range of key services. Given the difficulties that exist in respect of the viability of bus services within this rural area, the promotion of community transport services might be important in providing a complementary function that will support the main services and routes.

Multi-modal Transport

10.56 The public transport node in Milford Haven is situated around the railway station, however, the Pembrokeshire Regeneration Masterplan considers this to be poorly laid out, and with poor links to town and adjoining retail centre and poor quality facilities. Whilst the availability of a multi-modal connection is important and should be supported, the layout and location of the facility could prove a barrier to sustainable travel by discouraging public transport usage.

Public Transport and Complementarity

10.57 The proportion of journeys made by bus in Pembrokeshire and Carmarthenshire is was above the national average whilst the proportion of journeys made by rail is low at 1% in Carmarthenshire and negligible in Pembrokeshire. This greater reliance on bus services may reflect the lack of rail network with the Spatial Plan Area, particularly in the Northern part of both West Carmarthenshire and Pembrokeshire.

10.58 Certainly bus services provide better intra-hub connectivity whereas rail services provide better inter-hub connectivity. However, given its distance from the Haven Towns, Carmarthen has comparatively short rail journey times whereas the Fishguard Hub (which is much close to the Haven Towns Hub) is poorly connected by rail and bus journeys from Goodwick necessitate a change in Fishguard. Milford Haven has the poorest public transport connections of the Haven towns.

10.59 Poor off-peak services and journey times may limit the potential for main centres to provide evening and Sunday / Bank Holiday services and functions for those living within the tier 2 and 3 settlements. In particular this could limit the potential access to evening and night time leisure activities and, hence, for complementarity between the settlements.

10.60 The implications of poor public transport connections are that they could service to discourage people from using public transport, therefore promoting less sustainable forms of transport and making services and facilities less accessible by those that are reliant upon public transport. In short, poor public transport connections could represent a substantial barrier to complementarity.

Barriers to Accessibility to Specific Services

10.61 The Strategic Level Accessibility Assessment undertaken as part of the South West Regional Transport Plan identified the following parts of the SWWITCH area as having poor access to specific services as follows:

- the north and far west of the SWWITCH area have the worst access to education further and higher education
- Rural areas, particularly the central and northern parts of Carmarthenshire and Pembrokeshire have the worst access to employment
- Carmarthenshire and Pembrokeshire have the poorest access to all hospitals with rural areas having poorest access to GP surgeries
- Rural areas generally have the poorest access to food retail
- Access to leisure activities was found to vary depending on the destination

The Pembrokeshire – The Haven Spatial Plan area therefore exhibits poor access to many services in comparison with the rest of the SWWITCH area

Barriers to Accessibility for Specific Groups

10.62 Data from the 2001 census is mapped in the SWWITCH Accessibility Assessment to analyse key demographic and travel trends. The following analysis identifies the location of particular demographic groups who are more likely to experience transport limitations due to mobility, health or financial constraints.

a Carmarthen and Milford Haven and their immediate surroundings have a particularly high proportion of young people age 16-24 (15% or more);

b The demographic of Pembrokeshire and Carmarthenshire is characterised by a high proportion of older people. Tenby, St Davids, Fishguard and Cardigan in particular, have a high proportion of people over 65;

c St Davids had a high proportion of people with long term limiting illness which could be used as a proxy for mobility restrictions although the Household Travel Survey's more in-depth analysis found that Carmarthenshire had the greatest proportion of respondents with mobility issues in the SWWITCH area; and,

d Indices identify Milford Haven and Pembroke Dock as areas of both low income and multiple deprivation; this corresponds with a low proportion of car ownership (more than 20% with no car). By contrast much of rural West Wales has high car ownership (95% or higher) corresponding with a wealthier demographic.

10.63 Particular consideration should be given to the ways in which the needs of these specific groups might be better satisfied so that they might be able to engage more fully in the activities and services that are available within the Spatial Plan Area.

Proposed Improvements

10.64 A number of schemes have already been identified to address the various problems that exist in respect of the local transport network and thereby to improve accessibility within the Spatial Plan Area. The South West Regional Transport Plan identifies a number of road and public transport improvement projects which have passed a screening process and meet the objectives of the South West Regional Transport Plan, however, the timetable for some of these projects oming forward is not yet fixed., These are summarised below:

Road

10.65 The National Transport Plan for Wales 2009 and 2008 Update to the Trunk Roads Forward Programme identifies the following proposed improvements:

a Improvements to the 9km stretch of the A40 between Penblewin and Slebech Park to single carriageway standard providing safer overtaking opportunities in both directions and safer crossing facilities. A bypass of Robeston Wathen is included in the plan to remove traffic from the village and improve road safety.

b Improvements to the A40 between Llanddewi Velfry and Penblewin;

c Improvements to the A40 at The Kell which is situated between Haverfordwest and Fishguard to be made by 2011; and,

d A477 St Clears to Red Roses. This section of the A477 strategic route is to be updated to modern design standards like much of the remainder of the road by 2014.

10.66 The South West Regional Transport Plan sets out the following aspirations for the trunk road network:

a Improvements to the A40 west of St Clears (including dualling if feasible);

b Improving the A477, including a bypass at Llanddowror/ Red Roses which would facilitate access to employment sites south of the Spatial Plan Area;

c Signalisation of the Pensarn Roundabout, Carmarthen; and,

d Trunking the A485 between Carmarthen and Synod Inn.

10.67 The South West Regional Transport Plan also identifies some projects in the spatial plan area which are not part of the trunk road programme. These include the need for a bypass on Bulford Road to remove heavy traffic from Milford Haven town centre and for relief roads to alleviate heavy traffic flows in Pembroke, Milford Haven and Johnston. Whilst these projects have potential for convergence funding and have been identified as priorities, progress on the Bulford Road scheme has currently stopped due to lack of funding and no firm proposals are in place for any of the relief roads. Similarly, the South West Regional Transport Plan identifies the need for a Link Road in West Carmarthen to connect north west Carmarthen and the A40, thereby reducing traffic through the town centre and to facilitate the redevelopment of land around St David's Hospital and Trinity College. Both these projects are also identified in the relevant UDPS.

Public Transport

10.68 Whilst not directed specifically at the Pembrokeshire – The Haven Plan Area, the National Transport Plan for Wales seeks to improve interchanges between bus and rail mode in the following ways:

1 Integrated ticketing by 2014
2 A series of park and ride / multi-modal interchanges for public transport
3 Improvements to public transport information by 2011

Rail

10.69 The National Stations Improvement Programme includes improvements to Carmarthen railway station which is now undergoing a £520,000 refurbishment programme funded by the Council, Arriva Trains Wales, Network Rail and the Welsh Assembly Government to improve its toilets, waiting room, booking office and hall and customer information systems (www.arrivatrainswales.co.uk). Analysis of train services suggests that Carmarthen train station acts as the main railway hub within the Spatial Plan Area and trains become less frequent west of here. As such, the enhancement of facilities at Carmarthen will be important in enhancing the attractiveness of train travel within the Spatial Plan Area and between the Spatial Plan Area and surrounding destinations. In addition, there are also plans to improve Pembroke Dock and Milford Haven stations as public transport interchanges and improved pedestrian and cycle links. These proposals are in their early stages and not yet part of the National Stations Improvement Programme.

10.70 The only improvement proposed as part of the National Transport Plan 2009 and Rail Forward Programme 2008 which will be of direct benefit to the Spatial Plan Area is the proposed redoubling of the 5-7 mile pinch point between Gowerton and Loughor to the west of Swansea. Improvements to the line would enable the frequency of services west of this point through to Carmarthen and the remainder of the Spatial Plan Area to be increased in the future. The Regional Transport Plan seeks to improve the frequency of rail services from Carmarthen to Milford Haven to an hourly service and increase services to Fishguard from 2 to 5 trains a day, a proposal that is not dependent on the redoubling of the track West of Swansea. In addition, it also sets out an aspiration to reduce the travel time between Swansea and Pembroke Dock. All of these proposals would be important in enhancing the attractiveness of this mode of transport and providing a basis for better connections within the Spatial Plan Area and the adjoining Swansea Bay area.

Bus

10.71 The National Transport aims to secure improvement to the quality, reliability, punctuality and safety of local bus services by encouraging the take up of Bus Quality Statutory Partnerships and Quality Contracts by 2014.

10.72 Priority bus projects identified by the South West Regional Transport Plan include proposed improvements to a number of bus corridors in the Spatial Plan area, particularly with the Haven Towns hub.

10.73 The issue of commercial viability proves to be an on-going barrier to improving bus services, particularly in the case of improving off-peak services. Pembrokeshire Council spends approximately £1.3 million a year subsidising bus services in order to enable some services to continue to run.

10.74 The South West Regional Transport Plan highlights the potential of Community transport to plug the gap in public transport provision. Community Transport services in the Spatial Plan Area include social car schemes, community minibuses and Town-Rider, a dial-a-ride service for the elderly and those with mobility impairments. There might be scope to deliver enhancements to these facilities which would complement the main bus services, although this may be limited due to the additional expense per passenger compared to conventional bus services. Nonetheless the National Transport Plan also aims to work with the Community Transport Sector to secure improved access to key services by 2014.

11.0 Summary of Current Context

11.1 Based on the information gathered within the preceding chapters of this report, a SWOT analysis, which looked to identify the key strengths, weaknesses, opportunities and threats, was undertaken for each of the key centres. This exercise was undertaken to ascertain the current context and specifically the key roles of each of the centres. A summary of the results of this analysis is provided below.

Carmarthen

Strengths	Weaknesses
• Key service centre; • Dominant retail centre with newly developed Market Hall; • Largest employment centre in the Spatial Plan Area; • Trinity College - higher education; • Frequent rail services, to Cardiff and London – transport gateway; • Tourism gateway.	• Limited leisure provision; • Need for new health resource centre to replace existing primary care facilities.
Opportunities	**Threats**
• St Catherine's Walk retail development anchored by Debenhams and to include Apollo multiplex cinema; • Potential for Carmarthen Town Resource Centre; • Development as a business service centre; • Proposed improvements to Carmarthen station.	• Relevant role as a population centre is likely to decline.

11.2 Carmarthen's key role within the Spatial Plan Area is first and foremost as a County town and service and administrative centre. However, the town also has a strong retail role, a higher education role and a role as both a tourism and transport gateway. The town's main weakness lies in its relative lack of leisure opportunities and a need to improve health services. There are many opportunities available to Carmarthen including improvement of the retail and leisure offer, further improvements to the key transport links and development as a key business service centre. Threats to the centre are limited showing it to be strong, however, its role as a population centre look likely to decrease in relative terms the future.

Haverfordwest

Strengths	Weaknesses
• Pembrokeshire's main retail and service centre; • Pembrokeshire's largest employment centre; • The Castle and Museum are popular tourist destinations; • Townscape Heritage Initiative money to improve town's historic fabric; • New leisure centre at St Thomas Green opened early 2009; • Train Station; • The town has a small airport.	• Major public sector employers e.g. College, Hospital etc are located out of centre; • Heavily dependent on public sector employment; • Underperforming town centre; • Airport current potential for expansion is limited by County Show held on grounds over summer; • Congestion problems on main roads around Haverfordwest at peak times, particularly the A4076 Merlin's Bridge Junction to the South.
Opportunities	**Threats**
• Potential for growth as a business service centre; • Largest expected population increase of any town within the Spatial Plan Area; • Expansion of the airport's services if issue with County Show can be resolved; • Improvement of the comparison retail offer.	• The expansion of Carmarthen's retail offer; • Three out of centre retail parks.

11.3 Haverfordwest, like Carmarthen, is firstly a County town with a key administrative, service and retail function. However, it is also Pembrokeshire's largest employment centre and also plays a small tourism role though this is more in support of the key tourism destinations within the area. A new leisure centre has recently opened in the town which has boosted its leisure appeal and it is the only town in the Spatial Plan Area to benefit from an airport. The town is not without its weaknesses with the major public sector employers located outside the town centre and a heavy dependence on the public sector.

11.4 In terms of opportunities, Haverfordwest has the potential to grow as a business service centre which would also help to diversify the economy. Although not without its challenges it is also considered that the airport has potential for expansion, making it a more valuable resource (such as Newquay airport in Cornwall). There is, however, concern that given Carmarthen's imminent expansion of its retail offer work needs to be completed on how Haverfordwest can improve its comparison retail offer in order to be able to remain attractive as a retail centre.

Milford Haven

Strengths	Weaknesses
• The proliferation of the Energy Sector – oil refineries, LNG terminals etc. developing the waterway as a major UK energy centre; • Important employment centre; • Direct rail linkages to Manchester and Cardiff and a good service connection to London.	• Limited land/property for smaller scale general industrial uses; • Limited retail offer with a high volume of poor quality/value shops; • Poor linkages between the town centre and the Marina and Havens Head Business Park; • Poor quality rail facilities and linkages to the town centre; • Freight vehicles and construction traffic travelling through the town centre.
Opportunities	**Threats**
• Potential to expand the Dock and Marina; • Potential for a relief road to take inappropriate heavy goods vehicles out of the town centre; • Increased shipping could have spin off benefits for associated business opportunities; • Increased usage of the water for leisure and water sports; • Development of the Blackbridge Site; • Tesco potentially expanding; • Redevelopment of Kwik Save site for health centre; • Potential to improve facilities for cruise liners; • Expansion of the fishing industry; • Potential to promote marine based leisure and tourism activities; • Potential future improvements to train station as a public transport interchange.	• Closure of Woolworths in the town centre; • Unsuitable road network for freight and HGV traffic associated with port and energy sector;

11.5 Milford Haven's key role is as an employment centre, specifically for heavy industry associated with the Port, LNG terminals and oil refinery. However, Milford can also be considered a transport gateway with direct train links to Cardiff and Manchester and a busy working port. The key weakness with Milford Haven is that its growth as an employment centre has not led to a thriving town centre which currently has a relatively poor retail offer. The larger retailers in Milford Haven are located within the Haven's Head Retail Park which has poor links with the historic town centre. An added threat more recently has been the closure of the Woolworths store within the town centre which was one of the key anchors.

11.6 Milford Haven has a lot of potential for improvement. There would appear significant opportunity to extend and enhance its employment role even further through extension of the port and the marina, increased shipping, extension to the existing Tesco store, improvement of facilities for cruise liners and expansion of the fishing industry. However, for these improvements to occur without causing a negative impact upon the town centre it is considered that there is a need to construct a bypass relief road as the existing road network is considered unsuitable for freight vehicles which would undoubtedly increase if these opportunities are maximised.

Pembroke Dock

Strengths	Weaknesses
• The growth of the energy sector; • The development of the Pembrokeshire Technium; • The development of the Cleddau Bridge Business Park • Pembrokeshire's secondary retail centre after Haverfordwest; • Developing as major centre for land and water based leisure activities; • London Road development improving retail offer; • Ferry Links to the Republic of Ireland; • Train station; • Dock facilities; • Townscape Heritage Initiative money to improve town's historic fabric.	• Roads around Pembroke Dock considered unsuitable for freight vehicles and construction traffic. • Congestion at 4139/ Top road junction.
Opportunities	**Threats**
• Martello Quays proposal for marina and mixed use development to include residential, retail and leisure development; • Opportunities to develop marine based leisure activities; • Improvements to rail service between Pembroke and Pembroke Dock; • Opportunity to develop a relief road to prevent freight traffic entering town centre; • Replace general practice and community health facilities in Pembroke Dock with integrated primary care centre; • Potential future improvements to train station as a public transport interchange.	• Unsuitable road network for freight and HGV traffic associated with energy sector; • The Cleddau bridge is considered to act as a barrier to west Pembrokeshire for some users.

11.7 Pembroke Dock's key roles are as an employment centre and retail centre. As with Milford Haven, Pembroke Dock has seen growth in the energy sector and also has a ferry port with a regular ferry service to Rosslare, Ireland. A Technium has also recently opened at Pembroke Dock providing support for companies looking to exploit renewable and sustainable energy resources and the development of the Cleddau Bridge Business Park. As stated, Pembroke Dock has important retail function, being Pembrokeshire's second retail centre after Haverfordwest and serving south Pembrokeshire. The retail offer has significantly increased since the opening of several new retail units along London Road.

11.8 There is much opportunity to build upon these existing roles with the expansion of the Dockland area and further development of Pembroke Dock's reputation within the energy sector. A marina development is also proposed within Pembroke Dock which, when developed, will increase the centre's role as a leisure destination. However, as with Milford Haven, to maximise these benefits there is a need to build a bypass relief road to prevent heavy goods vehicles from having to travel through the town centre on roads which are currently deemed unsuitable.

Fishguard and Goodwick

Strengths	Weaknesses
• Key retail and service centre for north Pembrokeshire; • Gateway location; • The Ocean Lab attraction; • Ferry Port.	• Small scale centre with limited employment role; • Under-developed manufacturing sector; • Public sector employment poorly represented; • Dependence on the Port for employment opportunities; • Limited convenience and comparison retail offer; • Poor leisure offer; • Identified by Regional Transport Plan as having poorest connectivity, has a poor road network and public transport connections to rest of UK.
Opportunities	**Threats**
• Provision of a supermarket; • Improvement of the town centre and retail offer; • Opportunities for development of tourism product e.g. improved standard of serviced accommodation for those using the ferry link; • The potential to develop a marina and expansion of ferry terminal; • Redevelopment of the Trecwn Site (former MOD site) for employment purposes; • Increasing the frequency of rail services improving connections by public transport.	• Not fulfilling its role as the key service and retail centre for north Pembrokeshire; • Small population centre; • Large proportion of population of retirement age.

11.9 Fishguard and Goodwick is the key retail and service centres within north Pembrokeshire and the port also provides an important employment role. However, the centres are significantly underperforming in this role and as such, the key role of these settlements is considered to be as a ‘gateway location’. Overall, with the exception of the port, employment opportunities are limited and retail and leisure opportunities have a local focus only.

11.10 It is considered that opportunities exist to improve the complementarity of Fishguard and Goodwick through the development of a supermarket, and improvement of the general retail and leisure offer. However, more significant would be the development of a marina and expansion of the ferry terminal which would increase employment and allow the settlements to have a more leisure and tourism focus. The tourism offer in general is also considered an opportunity and there would appear a need to identify ways in which people could be attracted to stay in Fishguard rather than simply passing through on the way to the port.

Tenby

Strengths	Weaknesses
• It is the most popular destination for an overnight stay within the Spatial Plan Area; • Attractive, high standard beaches; • A number of festivals/regattas throughout the summer season; • Haden Miller Lifeboat Station tourist attraction; • Train Station. • Strong retail representation	• Heavily reliant on the tourism industry; • Employment can be largely seasonal; • Lack of retail development opportunities; • Lack of wet weather tourist attractions; • Traffic management issues in peak season.
Opportunities	**Threats**
• Opportunity to lengthen the tourist season by providing year round attractions; • Opportunity to develop the harbour area; • De Valance Pavillion expansion potential; • Potential to develop water sports as a niche tourism opportunity.	• High volumes of second/holiday home ownership; • Stag and Hen culture is growing and could impact on the centre as a family holiday destination; • Location within the National Park limits development opportunity.

11.11 Tenby is one of the key visitor destinations within Pembrokeshire and as such its key role is clearly as a tourism centre. There are certain weaknesses associated with this role as employment tends to be seasonal. Nonetheless, Tenby's function as a tourism centre is seen as important and is complementary to the role of the wider Spatial Plan Area. Opportunities for the future of this centre is to continue to focus on tourism and specifically trying to extend the length of the season.

Saundersfoot

Strengths	Weaknesses
• Popular tourism destination; • High quality and popular beaches; • Train station.	• Heavily reliant on the tourism industry; • Retail offer primarily orientated for visitors rather than local residents; • Traffic management issues in peak season.
Opportunities	**Threats**
• WAG and BT working together to improve broadband coverage.	• High volumes of second/holiday home ownership; • Within a broadband 'not-spot'; • Location within the National Park limits development opportunity.

11.12 Saundersfoot complements Tenby in its role as a tourism centre, and the two centres along with the other small coastal towns within this part of Pembrokeshire, have established themselves as an informal 'tourism hub'. As such, Saundersfoot displays the same strengths and weaknesses as Tenby.

Other Settlements

11.13 The only other settlements within the Spatial Plan Area which are considered to have a specific 'role' are St Davids and Narberth which have both developed niche retail roles, largely on the back of tourism. These two centres are seen as successful and further development of their unique roles should be encouraged.

11.14 Although the remaining centres within the Spatial Plan Area have no distinct roles they perform important local functions which complement the main centres. Predominantly they are population centres which offer day-to-day services to meet local need. Some centres, such as Newport and Laugharne are important for tourism although it is not considered to be their key role. In terms of opportunity it is important that the accessibility of these centres is maintained.