

**Key**

- Settlement
- Edge of hub

**Commuting In-Flow (number of people)**

- 0 - 50
- 51 - 100
- 101 +

**Commuting Out-Flow (number of people)**

- 0 - 50
- 51 - 100
- 101 +

Source: ONS, 2001

Source: ONS, 2001

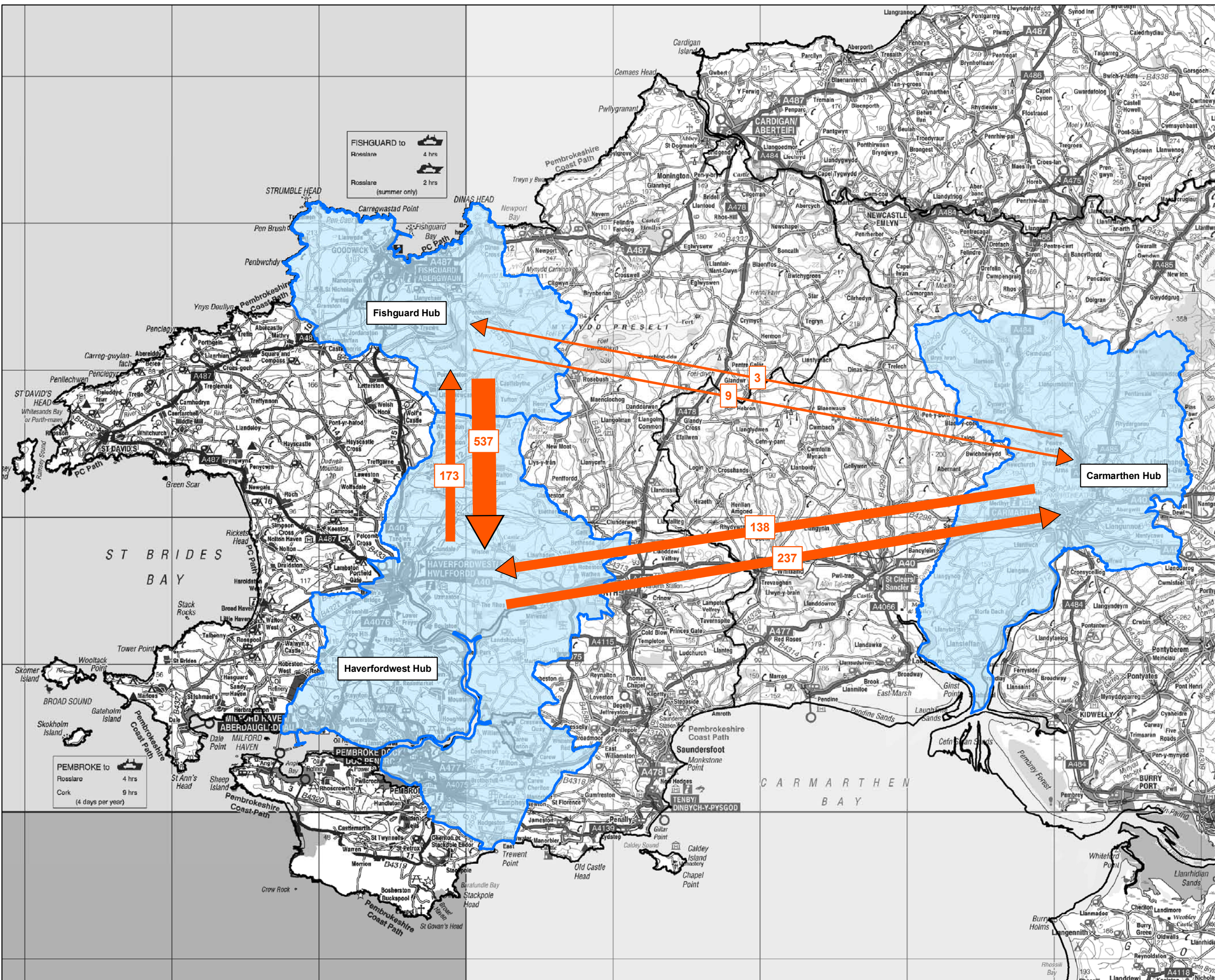
N.B.  
 + Commuting flows have been calculated at ward level.  
 + The flow arrows represent the flow of workers into a ward(s) from their home ward(s). The arrow has been mapped from a central point in the ward(s) and does not relate to specific X&Y locations.  
 + Certain commuting flows represent an amalgamation of those people who live/work in a number of wards. Wards have been amalgamated to define key settlements.



Project	Pembrokeshire Haven Complementarity Study
Title	Travel to Work Commuting Flows: Fishguard Hub
Client	Welsh Assembly Government
Date	13.03.09
Scale	1 : 250,000 @ A3
Drawn by	MAR
Drp No	GIS30576-014

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 GIS Reference: S:WE30576 - Pembrokeshire Haven Complementarity Study:WE30576 - Pembrokeshire Haven Complementarity Study - Travel to Work Commuting Flows - Fishguard Hub - 12.03.09.mxd





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

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

**Key**

- Hub
- Local Authority boundary

**Commuting Flow (number of people)**

- 0 - 100
- 101 - 300
- 301+

Source: ONS, 2001

N.B.  
 + Commuting flows have been calculated at ward level  
 + The flow arrows represent the flow of workers into a hub from their home hub  
 + The arrow has been mapped from a central point in the Hub and does not relate to specific X&Y locations  
 + Commuting flows represent an amalgamation of those people who live/work in a number of wards. Wards have been amalgamated to define key Hubs

**nlp Nathaniel Lichfield and Partners**

Project: Pembrokeshire Haven Complementarity Study

Title: Travel to Work Commuting Flows: Hub to Hub

Client: Welsh Assembly Government

Date: 15.04.09

Scale: 1 : 230,000 @ A3

Drawn by: MAR

Dwg No: GIS30576-027

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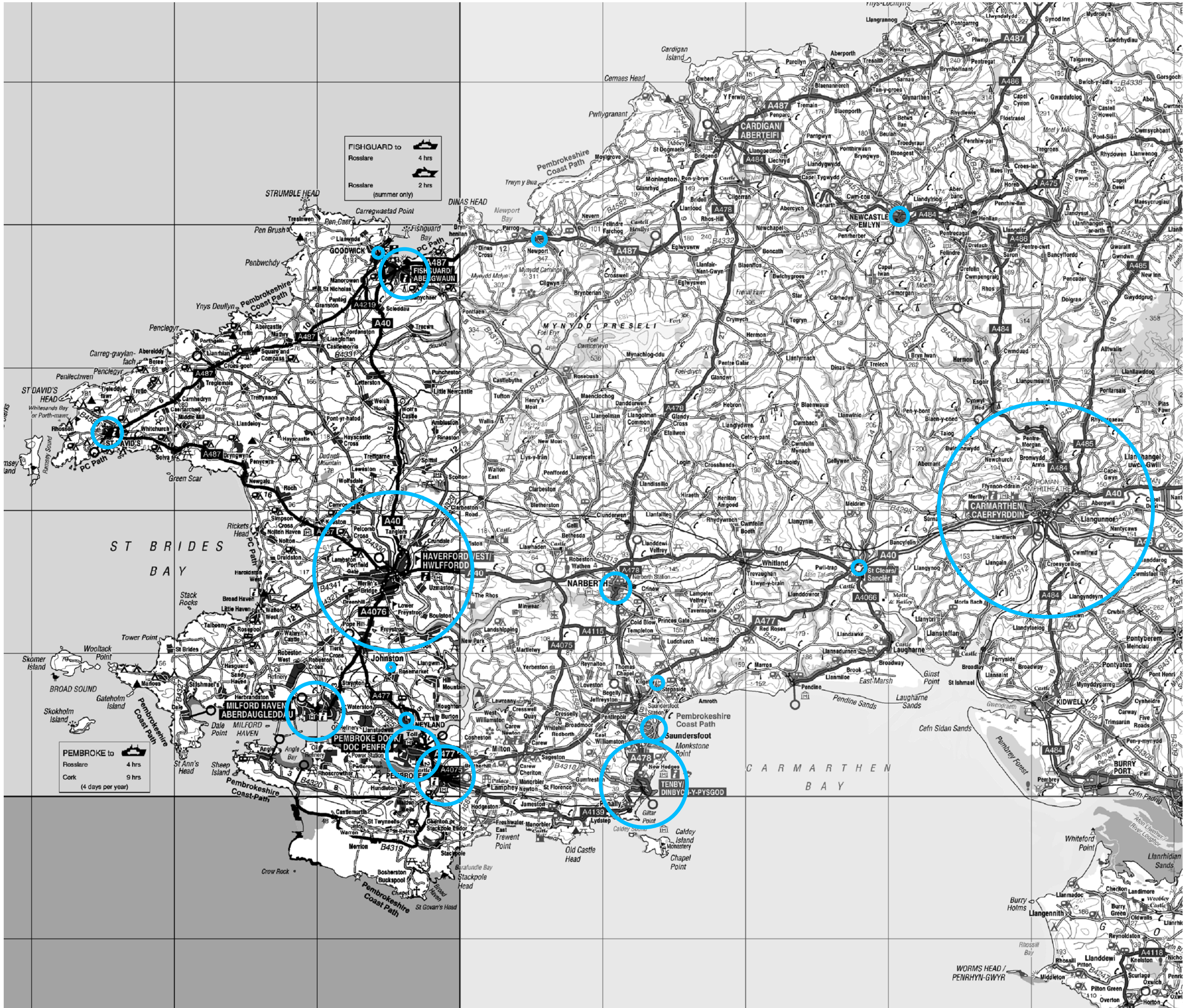
GIS Reference: S:WE30576 - Pembrokeshire Haven Complementarity Study - Travel to Work Commuting Flows - Hub to Hub - 15.04.09.mxd



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## APPENDIX 4 – RETAIL





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

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

**KEY**

**Retail Floorspace**

\*Size of circles is proportionate to retail floorspace in each settlement in comparison to the settlement with the largest amount of retail floorspace

Distribution of Retail Floorspace (m2) in Pembrokeshire Haven Spatial Plan Area

Carmarthen	54,750
Haverfordwest	41,996
Tenby	22,879
Milford Haven	15,162
Pembroke	14,473
Pembroke Dock	14,060
Fishguard	13,014
Narberth	7,805
St. Davids	7,076
Saundersfoot	6,497
Newcastle Emlyn	4,666
St Clears	3,480
Newport	3,471
Neyland	3,357
Kilgetty	3,205
Goodwick	2,593
Johnston	1,908

**nlp** Nathaniel Lichfield and Partners

Project Pembrokeshire Haven Complimentary Study

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

Client Welsh Assembly Government

Date September 2009

Scale 1:250,000 @ A3

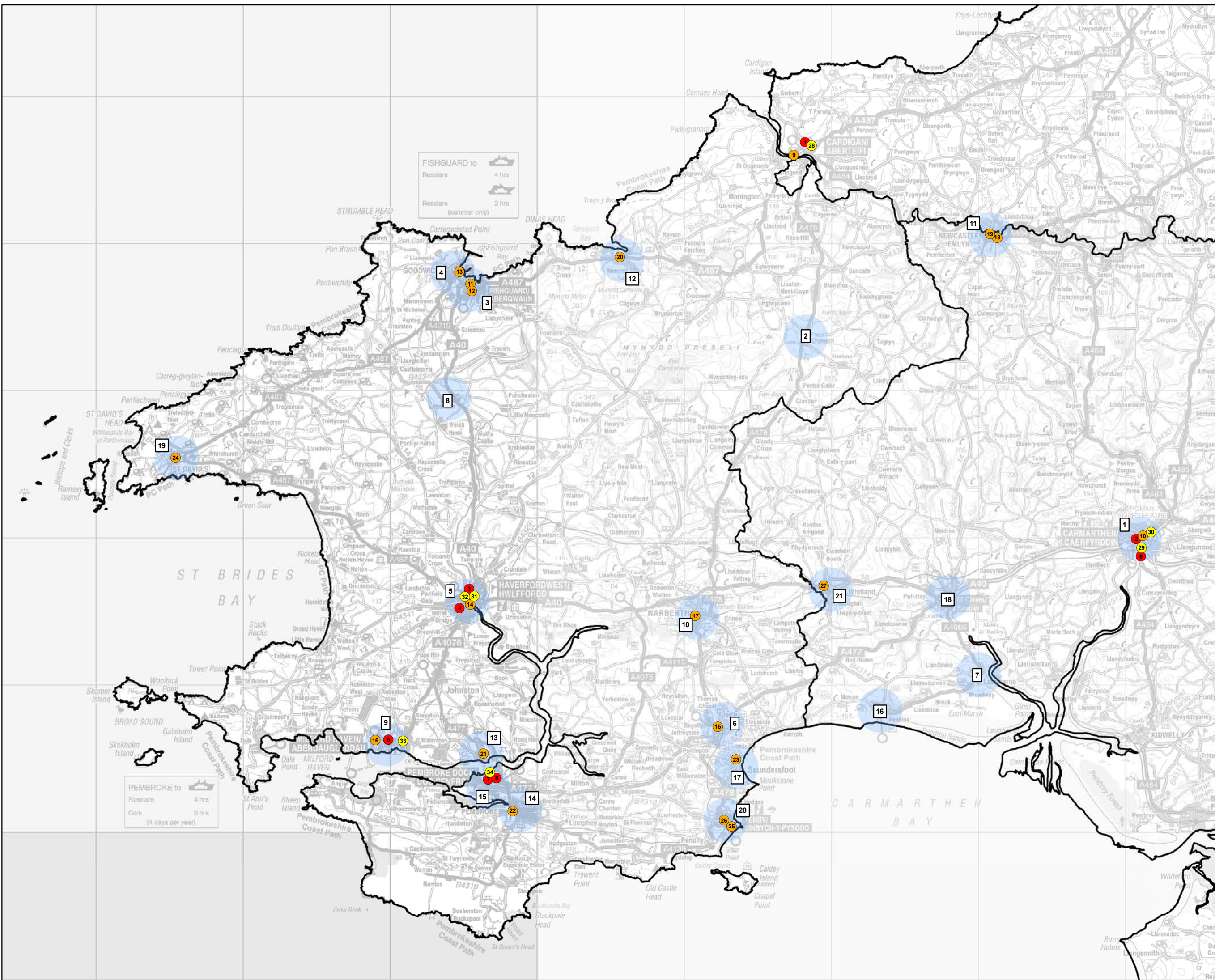
Drawn by IJ

Drg. No IL30576-02

WE30576/01

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- Key**
- Settlement
  - 1. Carmarthen
  - 2. Crymch
  - 3. Fishguard
  - 4. Goodwick
  - 5. Haverfordwest
  - 6. Kilgetty
  - 7. Laugharne
  - 8. Letterston
  - 9. Milford Haven
  - 10. Narberth
  - 11. Newcastle Emlyn
  - 12. Newport
  - 13. Neyland
  - 14. Pembroke
  - 15. Pembroke Dock
  - 16. Pendine
  - 17. Saundersfoot
  - 18. St Clears
  - 19. St Davids
  - 20. Tenby
  - 21. Whitland
- ▭ Local Authority boundary

- Existing Foodstore**
- Large Supermarket
  - 1. Tesco, Cardigan
  - 2. Tesco, Carmarthen
  - 3. Morrisons, Haverfordwest
  - 4. Tesco, Haverfordwest
  - 5. Tesco, Milford Haven
  - 6. Morrisons, Parc Pensarn
  - 7. Asda, Pembroke Dock
  - 8. Tesco, Pembroke Dock

- Medium/Small Supermarket
- 9. Somerfield, Cardigan,
- 10. Co-op, Carmarthen
- 11. CK Supermarket, Fishguard
- 12. Somerfield, Fishguard
- 13. Tesco Express, Goodwick
- 14. Iceland, Haverfordwest
- 15. Co-op, Kilgetty
- 16. CK Supermarket, Milford Haven
- 17. Spar, Narberth
- 18. CK Supermarket, Newcastle Emlyn
- 19. Somerfield, Newcastle Emlyn
- 20. Spar, Newport
- 21. Co-op, Neyland
- 22. Somerfield, Pembroke
- 23. Spar, Saundersfoot
- 24. CK Supermarket, St Davids
- 25. Somerfield, Tenby
- 26. Spar, Tenby
- 27. Co-op, Whitland

- Discount Supermarket
- 28. Aldi, Cardigan
- 29. Aldi, Carmarthen
- 30. Lidl, Carmarthen
- 31. Aldi, Haverfordwest
- 32. Lidl, Haverfordwest
- 33. Lidl, Milford Haven
- 34. Lidl, Pembroke Dock



Project Pembrokeshire Haven Complementarity Study

Title Existing Foodstores

Client Welsh Assembly Government

Date 16.04.09

Scale 1 : 230,000 @ A3

Drawn by MAr

Dwg No GIS30576-028

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GIS Reference: S:WE30576 - Pembrokeshire Haven Complementarity Study:WE30576 - Pembrokeshire Haven Complementarity Study - Existing Foodstores - 16.04.09.mxd



## Town Centre Retail Health Checks

- 1 PPW confirms the Assembly Government’s objective of enhancing the vitality, attractiveness and viability of town, district, local and village centres. TAN 4 sets out a number of measures which can assist in the assessment of the vitality, attractiveness and viability of town centres. Based on information provided by Pembrokeshire and Carmarthen, health checks have been undertaken on the main town centres within the spatial plan area.

### Haverfordwest

- 2 Haverfordwest is Pembrokeshire’s main administrative and retail centre and as such the town fulfils a number of functions, not only for its residents but also the residents of the surrounding settlements and rural areas. In terms of retail these functions include:

- **Convenience Shopping:** Haverfordwest has a range of supermarkets including a Tesco, Morrisons, Lidl and Iceland;
- **Comparison Shopping:** Haverfordwest has a number of both national multiple and independent retailers including Dorothy Perkins, Burtons, H Samuel, Claire’s Accessories etc.
- **Services:**

- 3 According to data provided by CACI the centre has a total of 261 retail units of the following composition:

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Haverfordwest	UK		Haverfordwest	UK
Convenience	19	7%	9%	2,945	7%	16.7%
Comparison	138	51%	45%	21,019	50%	50.9%
Service	103	38%	35%	16,400	39%	21.8%
Unknown	1	0%	n/a	254	1%	n/a
Vacant	11	4%	11%	1,378	3%	9.6%
<b>Total</b>	<b>272</b>	<b>100%</b>	<b>100%</b>	<b>41,996</b>	<b>100%</b>	<b>100%</b>

- 4 As can be seen, Haverfordwest’s retail composition closely follows the UK average with a healthy mix of convenience, comparison and service uses. Most notably the centre has a low vacancy rate indicating that it is relatively healthy.

- 5 The percentage of convenience floorspace is significantly lower than the UK average although it should be noted that the Haverfordwest figure does not include the out of town Tesco and Aldi foodstores. Furthermore, this analysis does not address the out of centre retail parks such as Bridge Meadow, Withybush and Springfield.

- 6 It should also be noted that despite the presence of a number of out of centre retail parks, Haverfordwest town centre has a high proportion of comparison floorspace for a town of its size and it is considered that this is the centre’s primary function.

## Milford Haven

7 Milford Haven is a port town with a large marina. It is mainly associated with industry particularly the energy sector. Although it is a large centre its retail offer is considered to be relatively weak. In terms of retail the town centre comprises the following:

- **Convenience Shopping:** Milford Haven has two supermarkets which are Tesco and CK Supermarket. It is also further supported by smaller convenience stores such as Spar.
- **Comparison Shopping:** Milford Haven has some multiple retailers but these are largely discount and low quality shops such as QS, Peacocks, Shoe Zone and various charity shops.
- **Services:** Milford Haven has the majority of key services to meet local need such as the main high street banks, hairdressers, post office etc.

8 According to data provided by CACI the centre has a total of 104 retail units of the following composition:

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Milford	UK		Milford	UK
Convenience	10	10%	9%	1,190	8%	17%
Comparison	38	37%	45%	5,005	33%	51%
Service	53	51%	35%	8,567	57%	22%
Unknown	0	0%	n/a	0	0%	n/a
Vacant	3	3%	11%	400	3%	10%
<b>Total</b>	<b>104</b>	<b>100%</b>	<b>100%</b>	<b>15,162</b>	<b>100%</b>	<b>100%</b>

9 The above table shows that Milford Haven follows the UK average for convenience goods but has a lower proportion of comparison goods and a higher proportion of services. However, when looking at the proportion of floorspace the differences between Milford Haven and the UK average appears even greater.

10 Within CACI's survey data it is stated that Milford Haven has a high vacancy rate. As can be seen from the above table in terms of the UK average the vacancy rate is actually quite low. Although the basis for this conclusion is unknown it could be that Milford Haven gives the perception of a number of vacant units due to the presence of roller shutters etc. CACI concluded that Milford Haven is underperforming as a retail centre largely due to its close proximity to Haverfordwest.

## Pembroke Dock

11 Pembroke Dock is largely considered to be Pembrokeshire's secondary retail and service centre after Haverfordwest. As such, the centre serves an important retail role. In terms of retail the town centre comprises the following:

- **Convenience Shopping:** Pembroke Dock has a large Tesco store towards the edge of the town centre as well as an Asda. There is also a Spar located along Dimond street as well as other smaller convenience retailers.
- **Comparison Shopping:** There are several multiple retailers located within Pembroke Dock including Boots, Clinton Cards, Shoe Zone, The Kitchen Shop etc. In addition, additional floorspace has been developed in London Road (outside the town centre boundary) which is occupied by retailers such as Argos, Brantano, Peacocks, Wilkinsons etc.
- **Services:** Pembroke Dock provides the majority of key services for local residents including a Specsavers opticians, banks and building societies, hairdressers, post office etc.

12 According to data provided by CACI the centre has a total of 93 retail units of the following composition:

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Pembroke Dock	UK		Pembroke Dock	UK
		Convenience	4		4%	9%
Comparison	43	46%	45%	6,233	44%	51%
Service	34	37%	35%	4,148	30%	22%
Unknown	3	3%	n/a	315	2%	n/a
Vacant	9	10%	11%	666	5%	10%
<b>Total</b>	<b>93</b>	<b>100%</b>	<b>100%</b>	<b>14,060</b>	<b>100%</b>	<b>100%</b>

13 The above table shows that Pembroke Dock has a limited amount of convenience retail. However, this is misleading as it includes the Asda foodstore and therefore, in terms of floorspace, Pembroke Dock is inline with the UK average.

14 In terms of comparison and service uses, Pembroke Dock reflects that UK average. However, the amount of comparison floorspace is actually slightly better than represented as the above table does not include the retail units along London Road.

15 The vacancy rate in Pembroke Dock was 10% at the time of CACI's study although this only equated to 5% of floorspace and therefore is not cause for any concern. Overall Pembroke Dock appears to be performing well in retail terms providing a vital and viable town centre.

### Pembroke

16 Pembroke, located to the south east of Pembroke Dock, appears to offer a less attractive retail offer than its neighbouring centre. However, the key aim appears to be to facilitate these centres to work more affectively together. Pembroke's key shopping destination is located



along Main Street. In terms of existing retail facilities, Pembroke offers the following:

- **Convenience Shopping:** There is a Somerfield supermarket located within the town centre as well as a number of smaller convenience traders.
- **Comparison Shopping:** There are few multiple retailers within the town centre with the majority of units occupied by independent traders.
- **Services:** The centre caters for the majority of local need through the provision of several banks, pharmacies, hairdressers, post office, pubs, cafes and restaurants.

17 According to data provided by CACI the centre has a total of 102 retail units of the following composition:

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Pembroke	UK		Pembroke	UK
Convenience	7	7%	9%	1,419	10%	17%
Comparison	40	39%	45%	5,124	35%	51%
Service	50	49%	35%	7,393	51%	22%
Unknown	1	1%	n/a	108	1%	n/a
Vacant	4	4%	11%	429	3%	10%
<b>Total</b>	<b>102</b>	<b>100%</b>	<b>100%</b>	<b>14,473</b>	<b>100%</b>	<b>100%</b>

18 As can be seen from the above table Pembroke has a lower proportion of convenience and comparison floorspace than the UK average and a significantly higher proportion of service uses. Vacancy rates in the centre are considered low at just 3% of the total floorspace. Overall the centre appears healthy.

### Narberth

19 Narberth is one of the smaller centres within the spatial plan area although it has an important tourist function. The centre is considered to be a good example of a sustainable town centre and is known for providing high quality niche retailing. In terms of existing retail provision, Narberth offers then following:

- **Convenience Shopping:** Narberth has a relatively limited convenience offer with a small Spar convenience store. However, the centre is unique by having the benefit of a number of high quality smaller independent retailers such as a deli, butchers, bakers etc.
- **Comparison Shopping:** Narberth predominantly offers independently owned niche retailing with particular growth as an



antiques centre along with gift shops, art galleries and craft shops.

- **Services:** The centre provides the majority of key services to meet the needs of local residents day to day including a post office, banks, hairdressers as well as a number of eating and drinking establishments to take full advantage of its appeal as a tourist destination.

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Narberth	UK		Narberth	UK
Convenience	6	9%	9%	1,006	13%	17%
Comparison	23	36%	45%	3,094	40%	51%
Service	35	55%	35%	3,705	47%	22%
Unknown	0	0%	n/a	0	0%	n/a
Vacant	0	0%	11%	0	0%	10%
<b>Total</b>	<b>64</b>	<b>100%</b>	<b>100%</b>	<b>7,805</b>	<b>100%</b>	<b>100%</b>

20 As can be seen from the table above, Narberth largely follows the UK average in terms of convenience units although it has a lower proportion of comparison units and a higher proportion of service units. The centre has no vacant units which indicates that it is both a vital and viable centre although this also limits any opportunity to improve the retail offer of the centre.

21 Overall, Narberth is considered to be a healthy centre which provides a unique shopping experience to both visitors and local residents.

### **Carmarthen**

22 The County town of Carmarthen is located on the River Towy in the heart of Carmarthenshire. The town centre health check survey revealed the town fulfils a number of functions not only for its residents but also the residents of the surrounding settlements and rural areas:

- **Convenience shopping** – Carmarthen has a range of large supermarkets, including the discount retailers Lidl and Aldi and two large supermarkets: a 8,175 sq m (net) Tesco Extra and 2,904 sq m (net) Morrison. In addition to this Carmarthen has a number of smaller independent and multiple convenience stores in the town centre.
- **Comparison shopping** – Carmarthen has a good range of retail multiples which are concentrated around Red Street, Greyfriars and Guildhall Square, as well as a number of independent units. Whilst there are a number of lower order household, discount and charity outlets in Carmarthen, the centre also serves the higher order needs of its surrounding population.



•**Services** – Carmarthen has a number of public services such as a library, advice centres, Job Centre, community centre and Council offices. Many of the major High Street banks and building societies are represented in the centre along side a post office, travel agents, hairdressing and beauty salons, estate agents, employment agencies and professional health, legal and business services.

23 The table below provides a summary of retail composition within Carmarthen:

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Carmarthen	UK		Carmarthen	UK
Convenience	23	8%	9%	3,860	7%	17%
Comparison	132	48%	45%	36,100	64%	51%
Service	106	39%	35%	15,040	27%	22%
Unknown	0	0%	n/a	n/a	n/a	n/a
Vacant	14	5%	11%	1,750	3%	10%
<b>Total</b>	<b>275</b>	<b>100%</b>	<b>100%</b>	<b>56,750</b>	<b>100%</b>	<b>100%</b>

24 The above shows that Carmarthen closely follows the national average in terms of the number of units although in terms of floorspace the centre has more comparison and less convenience floorspace than the UK average. However, much of the convenience floorspace is located on edge and out of centre sites and is therefore not included within these figures. The vacancy rate within Carmarthen is low, representing just 3% of total floorspace, which indicates a relatively healthy centre.

### **Fishguard and Goodwick**

25 Fishguard and Goodwick are the key retail and service centres for the North of Pembrokeshire. The town is predominantly known for its port which provides one of the main transport and shipping gateways to Ireland. In terms of retail composition, the centres provide the following retail facilities:

- **Convenience Shopping:** In terms of convenience shopping Fishguard and Goodwick provide a Somerfield and Tesco Express as well as a Spar shop and other smaller convenience retailers.
- **Comparison Shopping:** The centre is largely occupied by independent comparison retailers selling a variety of goods.
- **Services:** The centre provides a number of key services to meet local need including banks, hairdressers, post office etc.

26 According to data provided by CACI the centres of both Fishguard and Goodwick have a total of 114 retail units of the following composition:



Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Fishguard	UK		Fishguard	UK
Convenience	11	11%	9%	2,474	19%	17%
Comparison	37	37%	45%	4,811	37%	51%
Service	50	50%	35%	5,489	42%	22%
Unknown	0	0%	n/a	0	0%	n/a
Vacant	2	2%	11%	240	2%	10%
<b>Total</b>	<b>100</b>	<b>100%</b>	<b>100%</b>	<b>13,014</b>	<b>100%</b>	<b>100%</b>

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Goodwick	UK		Goodwick	UK
Convenience	4	24%	9%	821	32%	17%
Comparison	1	6%	45%	72	3%	51%
Service	12	71%	35%	1,700	66%	22%
Unknown	0	0%	n/a	0	0%	n/a
Vacant	0	0%	11%	0	0%	10%
<b>Total</b>	<b>17</b>	<b>100%</b>	<b>100%</b>	<b>2,593</b>	<b>100%</b>	<b>100%</b>

27 The above tables show that Fishguard has a higher proportion of convenience and service units and a lower proportion of comparison units than the UK average which is also reflected in the total amount of floorspace. The centre has a particularly low percentage of vacant units which indicates that the centre is relatively healthy.

28 Goodwick is one of the smaller centres within the spatial plan area with just 17 retail units. In terms of proportion, the centre predominantly accommodates service uses with only 1 comparison unit and 4 convenience units. It is difficult to compare such a small centre to UK averages and it would seem that this mix is appropriate for a centre of this size. Goodwick has no vacant units which is good although leaves little opportunity for improvements in the retail offer.

### Tenby

29 Tenby is one of Pembrokeshire's most popular seaside resort towns and consequently attracts a number of visitors in the summer season. Therefore, Tenby has a somewhat unique role as it needs to support a range of services and facilities for both residents and visitors with significantly fluctuating demand dependent on the time of year. In terms of shopping facilities Tenby provides the following:

- **Convenience Shopping:** Tenby only has 1 supermarket which is Somerfield although this is further supported by a number of independent convenience retailers such as a newsagent, butchers, bakers, greengrocers, deli, off licence etc.
- **Comparison Shopping:** In terms of national multiples, Tenby has a Boots, Peacocks, WH Smith, Shoe Zone and New Look. Other than these retailers the majority of units are occupied by independent traders. A number of the shops are targeted at tourists rather than local residents selling beach and holidays goods and there is a



high number of gift shops within the centre. There are also a number of charity shops.

- **Services:** Tenby has approximately 50 restaurants and cafes which is a significant proportion of all service units and reflects the towns appeal as a tourism destination. However, the centre also caters well for local residents with a number of banks/building societies, hairdressers, travel agents, launderette and estate agents.

30 The table below provides a brief summary of retail composition within the town centre:

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Tenby	UK		Tenby	UK
Convenience	20	10%	9%	2,839	12%	17%
Comparison	91	45%	45%	9,955	44%	51%
Service	86	42%	35%	9,712	42%	22%
Unknown	0	0%	n/a	n/a	n/a	n/a
Vacant	7	3%	11%	373	2%	10%
<b>Total</b>	<b>204</b>	<b>100%</b>	<b>100%</b>	<b>22,879</b>	<b>100%</b>	<b>100%</b>

31 As can be seen, Tenby closely follows the UK average for the proportion of both convenience and comparison units. The centre, has a slightly higher number of service units and it has a significantly lower vacancy rate than the UK average. The high number of service units seems to reflect the town's role as a tourist destination providing a number of outlets for visitors to eat and drink. Overall the town centre appears healthy with a good mix of units.

### Saundersfoot

32 Saundersfoot is a seaside resort, although remains secondary to the role of Tenby in terms of both a tourist and shopping destination for both visitors and residents. In terms of shopping facilities Saundersfoot provides the following:

- **Convenience Shopping:** Saundersfoot does not benefit from a supermarket and as such local residents have to travel to undertake convenience shopping. The centre does however have a baker, butchers, greengrocers, newsagents etc. so local residents can go into the centre for key essential just as bread and milk.
- **Comparison Shopping:** The centre does not have any multiple retailers and the majority of comparison shops offer gifts and holiday goods. It is considered that comparison shopping is geared more towards visitor spend than to cater for the needs of local residents.



- **Services:** Over half of all service units within the centre are pubs, restaurants and cafes which reflects the centre's role as a holiday destination.

33 The table below provides a summary of the retail composition of Saundersfoot:

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Saundersfoot	UK		Saundersfoot	UK
		Convenience	9		14%	9%
Comparison	29	46%	45%	3,012	46%	51%
Service	23	37%	35%	2,557	39%	22%
Unknown	0	0%	n/a	n/a	n/a	n/a
Vacant	2	3%	11%	73	1%	10%
<b>Total</b>	<b>63</b>	<b>100%</b>	<b>100%</b>	<b>6,497</b>	<b>100%</b>	<b>100%</b>

34 As can be seen from the above Saundersfoot closely follows the UK average in terms of both comparison and service units although there is a slightly higher proportion of convenience units and a significantly lower proportion of vacant units. Overall the centre appears relatively healthy although it appears to cater more for the needs of visitors than the needs of the resident population.

### St Davids

35 St Davids is a key tourism destination within Pembrokeshire Coast National Park. The tourism industry has meant an increase in the number of cafes, pubs and restaurants within the centre although the retail offer is relatively limited for local residents. In terms of retail facilities, St Davids provides the following:

- **Convenience Shopping:** St Davids has 1 supermarket which is CK supermarket although this is further supported by a bakers, butchers, and Deli.
- **Comparison Shopping:** The majority of retailers within the town centre are independent traders. The town has a high number of gift, gallery and antique shops making it quite a unique shopping centre.
- **Services:** The centre has a good mix of services with several pubs, restaurants and cafes as well as banks/building societies, estate agents, hairdressers and tourist information offices.

36 The table below provides summary of the retail composition of St Davids:



Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		St Davids	UK		St Davids	UK
Convenience	4	8%	9%	1,626	23%	17%
Comparison	24	45%	45%	3,176	45%	51%
Service	24	45%	35%	2,089	30%	22%
Unknown	0	0%	n/a	n/a	n/a	n/a
Vacant	1	2%	11%	185	3%	10%
<b>Total</b>	<b>53</b>	<b>100%</b>	<b>100%</b>	<b>7,076</b>	<b>100%</b>	<b>100%</b>

37 The town centre largely follows the UK average in terms of the number of convenience and comparison units. There is a slightly higher proportion of service units than the UK average but this is not out of character with a centre of this size. The number of vacant units is extremely low indicating a healthy centre.

### Newport

38 Newport is also considered to be a tourism destination although to a lesser extent to the other centres within the National Park. However, Newport is considered to be well supported by local residents with no readily accessible competing centre within the vicinity. In terms of retail provision, Newport provides the following:

- **Convenience Shopping:** Newport does not have a supermarket although it does have a Spar convenience store as well as a butchers and newsagents.
- **Comparison Shopping:** Newport has few comparison units although almost half are dedicated to the sale of gifts.
- **Services:** The centre has a number of service units with over 50% being pubs/cafes/restaurants.

39 The table below provides a summary of Newport's retail composition:

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Newport	UK		Newport	UK
Convenience	5	17%	9%	667	19%	17%
Comparison	8	28%	45%	776	22%	51%
Service	12	41%	35%	1,626	47%	22%
Unknown	0	0%	n/a	n/a	n/a	n/a
Vacant	4	14%	11%	402	12%	10%
<b>Total</b>	<b>29</b>	<b>100%</b>	<b>100%</b>	<b>3,471</b>	<b>100%</b>	<b>100%</b>

40 As can be seen, Newport has almost twice the number of convenience units than the UK average. The centre also has quite a high vacancy rate which could be cause for concern. The health of the centre should be monitored to see changes in the retail offer.

## Neyland

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Neyland	UK		Neyland	UK
Convenience	4	13%	9%	429	13%	17%
Comparison	0	0%	45%	0	0%	51%
Service	16	52%	35%	1,977	59%	22%
Unknown	0	0%	n/a	0	0%	n/a
Vacant	11	35%	11%	951	28%	10%
<b>Total</b>	<b>31</b>	<b>100%</b>	<b>100%</b>	<b>3,357</b>	<b>100%</b>	<b>100%</b>

41 The most significant point to make about Neyland's retail composition is the high number of vacant units which account for 35% of all units and 28% of the total floorspace. This is much higher than the UK average and indicates that the centre is performing very poorly.

42 The centre also has no comparison shops which results in all comparison expenditure leaking to larger centres such Milford Haven, Haverfordwest, Pembroke Dock and Pembroke.

## Crymych

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Crymych	UK		Crymych	UK
Convenience	6	26%	9%	1189	41%	17%
Comparison	5	22%	45%	641	22%	51%
Service	9	39%	35%	874	30%	22%
Unknown	0	0%	n/a	0	0%	n/a
Vacant	3	13%	11%	185	6%	10%
<b>Total</b>	<b>23</b>	<b>100%</b>	<b>100%</b>	<b>2,889</b>	<b>100%</b>	<b>100%</b>

43 Crymych has predominantly service and convenience units although 22% of the units sell comparison goods. The centre has 3 vacant units which equates to 13% of units but only 6% of total floorspace. Overall, the number of vacant units is not cause for concern and the centre appears adept to serve the need of local residents.

## Kilgetty

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Kilgetty	UK		Kilgetty	UK
Convenience	2	11%	9%	1417	44%	17%
Comparison	5	26%	45%	792	25%	51%
Service	11	58%	35%	967	30%	22%
Unknown	0	0%	n/a	0	0%	n/a
Vacant	1	5%	11%	29	1%	10%
<b>Total</b>	<b>19</b>	<b>100%</b>	<b>100%</b>	<b>3,205</b>	<b>100%</b>	<b>100%</b>

44 Kilgetty has predominantly service uses although the number and proportion of convenience floorspace also exceeds the UK average. The centre has a local vacancy rate and overall appears to be healthy.



## Johnston

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Johnston	UK		Johnston	UK
Convenience	3	23%	9%	455	24%	17%
Comparison	5	38%	45%	569	30%	51%
Service	4	31%	35%	724	38%	22%
Unknown	0	0%	n/a	0	0%	n/a
Vacant	1	8%	11%	160	8%	10%
<b>Total</b>	<b>13</b>	<b>100%</b>	<b>100%</b>	<b>1,908</b>	<b>100%</b>	<b>100%</b>

- 45 Johnston has a good mix of units which predominantly sell comparison goods. The centre also has 3 convenience stores to meet the day to day needs of local residents. There is only one vacant unit present in the centre. Overall Johnston appears healthy.

## Letterston

Type of Unit	No. of Units	Proportion of Total No. of Units (%)		Gross floor area (sq. m)	Proportion of Total Floorspace (%)	
		Letterston	UK		Letterston	UK
Convenience	2	11%	9%	255	14%	17%
Comparison	3	16%	45%	223	12%	51%
Service	5	26%	35%	1,221	66%	22%
Unknown	0	0%	n/a	0	0%	n/a
Vacant	9	47%	11%	151	8%	10%
<b>Total</b>	<b>19</b>	<b>100%</b>	<b>100%</b>	<b>1,850</b>	<b>100%</b>	<b>100%</b>

- 46 Letterston also has a good mix of units with predominantly service uses supported by comparison and convenience units. However, there are 9 vacant units within Letterston which accounts for 47% of all units but only 8% of total floorspace which is below the UK average. With so many vacant units it is difficult to conclude that the centre is healthy. It may be necessary to investigate whether the small size of the units is a barrier to their occupation.

## Town Centre Rents and Yields

- 47 In terms of town centre rents within the spatial plan area, data provided by Colliers CRE only provides information for the centres of Carmarthen and Haverfordwest. As can be seen Carmarthen commands substantially higher rents than Haverfordwest although Haverfordwest outperforms the centre of Cardigan.
- 48 Both Carmarthen and Haverfordwest are significantly behind Swansea in terms of the rents that they can command although this is not surprising given that it is an urban city centre.

Table A: Town Centre Rents

Centre	2007 Rent £psf	2008 Rent £psf
Cardiff	300	300
Swansea	160	160
Carmarthen	90	90
Haverfordwest	50	no data
Cardigan	30	no data

49

The yields of the various centres paints a similar picture with information only available for Carmarthen and Haverfordwest. As can be seen from the table below Carmarthen has a lower yield than Haverfordwest and as such is considered to be a healthier more prosperous centre.

Table B: Town Centre Yields

Centre	Jul-04	Jul-05	Jul-06	Jul-07	Jul-08
Cardiff	4.5	4.5	4	4	4
Swansea	6	6	6	6	5.75
Cardigan	9.5	9.5	9.5	9	9
Carmarthen	7.75	7.5	7.5	7	7
Haverfordwest	8.5	8.5	8.5	8	8



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## APPENDIX 5 – LEISURE