



Pembrokeshire County Council County Wide Retail Study

March 2010

MAIN REPORT



One Kingsway
Cardiff
CF10 3AN

0870 900 8990
www.gvagrimley.co.uk

CONTENTS

1.	INTRODUCTION.....	4
	Overview.....	4
	Objectives of the Study.....	4
	Sources of Information.....	7
	Structure of the Report.....	8
2.	POLICY OVERVIEW.....	9
	Preface.....	9
	National Retail Planning Policy.....	9
	Local Retail Planning Policy.....	12
	Emerging Retail Planning Policy.....	14
3.	RETAIL TRENDS.....	19
	Introduction.....	19
	Demographics.....	19
	Income & Expenditure.....	20
	Sales Efficiency.....	23
	Employment.....	24
	Location.....	24
	Size of Units.....	27
	Foodstores.....	28
	Shopping & Leisure.....	28
	Internet Shopping/E-Tailing.....	29
	Summary.....	30
4.	ASSESSMENT OF TOWN CENTRES.....	31
	Introduction.....	31
	The Sub-Regional Retail Hierarchy.....	33
	Retailer Requirements.....	37
	Town Centre Composition.....	38
	Haverfordwest Town Centre.....	47
	Tenby Town Centre.....	53
	Pembroke Town Centre.....	57
	Pembroke Dock Town Centre.....	61
	Milford Haven Town Centre.....	65
	Fishguard Town Centre.....	68
	Narberth Town Centre.....	71
	Newport Town Centre.....	74
	St David's Town Centre.....	76
	Saundersfoot Town Centre.....	78
	Kilgetty Town Centre.....	81
	Goodwick Town Centre.....	82

Retail Development Sites.....	84
5. QUALITATIVE & QUANTITATIVE NEED ASSESSMENT	87
Introduction.....	87
Qualitative Assessment.....	87
Quantitative Assessment	97
6. SUMMARY & RECOMMENDED STRATEGY FOR RETAILING IN PEMBROKESHIRE.....	111
Introduction.....	111
Recommendations for Haverfordwest	111
Recommendations for Milford Haven.....	112
Recommendations for Pembroke Dock.....	112
Recommendations for Pembroke	113
Recommendations for Fishguard	113
Recommendations for the Tenby / Saundersfoot / Narberth / Kilgetty area.....	113

APPENDICES (BOUND SEPARATELY)

Appendix A	Plan of Study Area
Appendix B	Household Survey Tabulations
Appendix C	Pembrokeshire Local Development Plan Preferred Strategy: Policy Extracts
Appendix D	Town Centre Land Use Plans
Appendix E	Site Assessment Proformas
Appendix F	Quantitative Need Assessment Tables

1. INTRODUCTION

Overview

- 1.1 This report has been prepared by GVA Grimley Ltd ('GVA') on the instructions of Pembrokeshire County Council ('PCC') to prepare a retail study to provide it with essential background information for the emerging Local Development Plan (LDP).
- 1.2 The LDP will ultimately supersede the existing development plan for the County – the Joint Unitary Development Plan for Pembrokeshire (2000 - 2016) (JUDP). The JUDP was adopted in 2006 and covers the administrative areas of both Pembrokeshire County Council (PCC) and the Pembrokeshire Coast National Park Authority (PCNPA). PCC and PCNPA are both progressing separate LDPs, however, in order to provide a robust evidence base, and in recognition of the cross-boundary nature of retail activity, this study covers the whole of Pembrokeshire (as reflected in the JUDP).
- 1.3 The two authorities are currently in the process of preparing their LDPs and the principal purpose of the study is to inform this process. The recommendations in this report will feed into the LDP process. The study could also be used by PCC and PCNPA to assist them in their consideration of any planning applications for retail development within their respective areas.
- 1.4 National planning policy guidance requires that local planning authorities' policies and proposals in a LDP should be underpinned by comprehensive and credible evidence. The Welsh Assembly document 'Local Development Plans Wales' requires local planning authorities to prepare and maintain an up-to-date evidence base and this retail study will form an integral part of PCC's information library. It is intended that this study will meet these requirements by providing comprehensive survey material, including surveys of: town centre uses, the availability and use of existing centres, the health of centres, the accessibility of centres, retail expenditure patterns and proposals in adjacent areas.
- 1.5 For the purposes of the study, the main town centres have been defined as: Haverfordwest, Milford Haven, Pembroke, Pembroke Dock, Fishguard & Goodwick, Narberth, Tenby. Smaller district and local centres also considered are St Davids, Kilgetty, Saundersfoot and Newport.

Objectives of the Study

- 1.6 The overall aim of the study is to provide a single evidence base to inform the retailing and town centres section of the forthcoming PCC LDP, including its strategy, area-wide policies and

reasoned justification. The study will also provide the Council with a robust evidence base to make development control decisions on planning applications for retail development and specific allocations of land for retail development within the town centres. To meet these objectives, the study can be broken down into 3 key stages. These, together with the principal tasks for each, are as follows:

Stage 1 Town Centre Health Checks

- Assess the health of the main centres within the study area using the indicators provided by Technical Advice Note 4: Retailing & Town Centres (TAN4). This review would be based on available data from PCC and PCNPA's background papers to the LDP, supplemented by desktop research and site visits. The household survey (see below) commissioned for the study also provides very useful information on customer views of the main town centres.
- Review of out-of-centre retail provision in each of the main towns to derive a complete picture of shopping provision in each settlement.

Stage 2 Assessment of Current Shopping Patterns & Expenditure Flows

- Assess current shopping patterns (for food and different types of non-food shopping) and apply this data to current population and per capita expenditure levels to derive expenditure flows across the County, including leakage of expenditure to other administrative areas;
- Provide a detailed picture of the turnover of town centre and out-of-centre retail facilities in each key settlement, include the catchment areas of each settlement and the inter-relationship of key settlements in the County in terms of shopping behaviour and expenditure flows.

Stage 3 Assessment of the Need for Additional Retail Development in Pembrokeshire up to 2021

- Undertake a quantitative assessment of the likely future retail demand and need for additional retail floorspace for comparison and convenience goods within each retail centre for the plan period (up to 2021). The assessment would be broken down into food and non-food shopping, and several separate types of non-food categories would be identified including clothing/footwear, carpets/furniture, DIY, electrical, personal/luxury goods, and recreational goods.
- Undertake a qualitative assessment of the need for additional retail floorspace for comparison and convenience goods by examining the quantum, location, range and choice of food and non-food retail facilities within each settlement and identify (having regard to the

position of each settlement in the overall settlement hierarchy) whether there is sufficient provision or whether there are gaps/deficiencies in provision.

- Account for changing or alternative shopping patterns (where qualitative indicators or retail commitments (permissions or allocations) dictate) and analyse how these would affect the resultant retail capacity (or quantitative need).
- Advise on the potential impacts that may arise from future retail development, under construction or proposed (i.e. commitments / planning applications), in competing centres outside Pembrokeshire.
- Advise on the need for new retail development, the appropriate forms of such development to accommodate any projected retail need, and the impact that additional retail floorspace provision would have on the vitality and viability of each retail centre.

1.7 In order to achieve the above aims, PCC requires a comprehensive analysis of retailing in Pembrokeshire that addresses both quantitative and qualitative issues. PCC requires that this study considers retail issues in a holistic manner, taking account of underlying patterns of sustainability, social inclusion and technological change. Accordingly, this study includes the following key components:

- Provision of a policy analysis, based on the contents of Ministerial Interim Planning Policy Statement (MIPPS) 02/2005. At the local level, the adopted JUDP provides the current strategic context for retailing in Pembrokeshire. This study will facilitate a review of the robustness of shopping policies and proposals in the Plan, to inform the policy formulation in the LDP.
- Overview of the retail hierarchy in Pembrokeshire, focusing on a review of the vitality and viability of the eleven town and local centres¹ (Haverfordwest, Milford Haven, Pembroke, Pembroke Dock, Fishguard & Goodwick, Narberth, Tenby, St Davids, Kilgetty, Saundersfoot and Newport). The assessment examines the retail performance of each centre, plus demands for space by national multiple retailers.
- Assessment of retail capacity in Pembrokeshire over the plan period up to 2021, focusing on an assessment of quantitative need for different types of retail goods. This work will draw upon up-to-date population, per capita expenditure and shopping patterns data to provide a forecast capacity for Pembrokeshire as a whole, plus predictions for the main settlements. As part of the assessment of need, qualitative indicators of retail provision in Pembrokeshire are also reviewed.

¹ Fishguard & Goodwick has been classified as one settlement for the purposes of the study. Healthchecks have, however, been undertaken for both centres individually.

- Following completion of the above tasks, we examine the broad options for the future of retail and town centre policy in Pembrokeshire over the lifetime of the Pembrokeshire LDP. This analysis examines the different characteristics for individual settlements, including the differing approaches to each type of retail provision. We then provide a set of concise conclusions and a retail strategy for the main settlements. These focus on the retail hierarchy and the likely future role of each centre, town centre improvements and retail development/investment/regeneration opportunities.

Sources of Information

- 1.8 A key contributor to all of the above tasks has been empirical research in the form of a household telephone survey commissioned by PCC and GVA Grimley for this retail study.
- 1.9 The survey interviewed 1,500 people across a wide geographic area, based on postcode sector areas, within the Pembrokeshire administrative area plus adjoining local authority boundaries. A plan of the survey area is contained at Appendix A of this report. The survey, the parameters of which are explained in greater detail in Section 5 of this report, has established shopping habits of households for different types of food and non-food goods and has, in turn, contributed towards the detailed assessment of need for additional retail floorspace.
- 1.10 The survey has also been structured to ascertain customer profiles, mode of travel to shopping destinations, plus a number of attitudinal questions determining what users think about the various town centres, and potential improvements to these centres. A full copy of the household survey tabulations is contained at Appendix B.
- 1.11 PCC and PCNPA have prepared a wide range of background documents to the LDP from a retail perspective. These provide a significant and readily available data source for this study and have been augmented by GVA Grimley's own empirical research. The documents used are as follows:
- PCC Background Paper for Local Development Plan: Local Retail Centres (April 2009);
 - PCC Background Paper for Local Development Plan: Retail Main Towns (July 2008);
 - Pembrokeshire Regeneration Masterplan 2008 / 2013: The Framework (June 2008);
 - PCNPA Background Paper No.* Retail - Management Plan (2008 - 2012) Local Development Plan (2006 - 2021) (January 2009);
 - Pembrokeshire Residents Survey 2007 (Final Report) – Wavehill Consulting
 - Milford Haven Town Centre Regeneration Framework (November 2008) – Barton Willmore

Structure of the Report

1.12 The remainder of this report is structured as follows:

- **Section 2** of this report provides a brief review of current national planning policy guidance, plus retail policies contained within the current local planning policy context outlined in the adopted JUDP.
- **Section 3** of this report analyses national retail trends. This includes a look back at recent historic trends, plus examination of likely future trends at the national level.
- **Section 4** provides an assessment of the retail hierarchy within Pembrokeshire and the surrounding area, concentrating on the health of the eleven key centres in the County, monitoring the performance of relevant indicators as set out in national planning policy guidance. This section also provides an overview of out-of-centre retail provision within the County and retail provision in the sub-region and an assessment of potential town centre development sites in the Pembrokeshire County Council administrative area.
- **Section 5** sets out an assessment of future need for additional retail floorspace provision in Pembrokeshire over the lifetime of the LDP (up to 2021). It examines both quantitative and qualitative considerations of retail need and expresses estimates of need for each of the key towns.
- Drawing upon the findings of preceding chapters, **Section 6** provides a summary of the main findings of the study and outlines the broad policy options for the Pembrokeshire LDP, examining future trends for floorspace capacity in Pembrokeshire

1.13 All plans, statistical tables, and other documents referred to in the text of this study are contained in separately bound appendices.

2. POLICY OVERVIEW

Preface

2.1 This chapter outlines the salient planning policy context for retailing and town centres at the national, regional, strategic, and local levels. In particular, it outlines national planning policy in Planning Policy Wales (PPW) and its approach to protecting and enhancing town centres, plus the assessment of the need for additional retail provision. At the local level, we summarise the retailing and town centres policies of the adopted JUDP for Pembrokeshire.

National Retail Planning Policy

2.2 Planning Policy Wales (PPW) was published by the Assembly Government in 2002 and provides the context for sustainable land use policy in Wales. Chapter 10 of PPW sets out policy guidance for retailing and town centres, although was amended in 2005 by the publication of a Ministerial Interim Planning Policy Statement (02/2005) entitled 'Planning for Retailing and Town Centres'. Therefore, references to national retail planning policy in the remainder of this report will be taken from MIPPS 02/2005.

2.3 The Assembly Government's objectives for retailing and town centres are to

- Secure accessible, efficient, competitive and innovative retail provision for all the communities of Wales, in both urban and rural areas;
- Promote established town, district, local and village centres as the most appropriate locations for retailing, leisure and for other functions complementary to it;
- Enhance the vitality, attractiveness and viability of town, district, local and village centres; and to
- Promote access to these centres by public transport, walking and cycling.

2.4 PPW notes that local planning authorities should develop through their community strategies and development plans, clear strategy and policies for retail redevelopment, and for the future of town, district, local and village centres in their area, which promote a successful retailing sector supporting existing communities and centres. These plans should establish the existing hierarchy of centres, identify those which fulfil specialist functions, and be clear about their future roles. They should identify changing pressures and opportunities and devise appropriate responses to them. In some situations it may be necessary to take pro-active steps to identify town or city centre locations for expansion or in others manage the decline in relative importance of a centre as other centres expand. Dealing with change may mean redefining the boundaries of centres or identifying acceptable changes of use.

2.5 Development plans should:

- establish the strategic role to be performed by the main centres in the retail hierarchy.
- set out measures to reinvigorate particular centres, as appropriate;
- set out detailed policies to achieve vital, attractive and viable centres;
- allocate sites for new retail and leisure facilities and other uses best located in town centres, where there is assessed to be a quantitative or qualitative need, using the sequential approach;
- include a criteria based policy against which proposals coming forward on unallocated sites can be judged;
- set out policies for primary and secondary frontages, where appropriate.

2.6 In developing policies to revitalise and increase the attractiveness of existing centres, local planning authorities should consult the private sector and local communities and should pay particular attention to the character of historic towns and conservation areas. Although retailing should continue to underpin town, district, local and village centres it is only one of the factors which contribute towards their well-being. Policies should encourage a diversity of uses in centres. Mixed use developments, for example, combining retailing with entertainment, restaurants and housing should be encouraged to promote lively centres as well as reducing the need to travel to visit a range of facilities. Leisure uses can benefit town and district centres and, with adequate attention to safeguarding amenities, can contribute to a successful evening economy.

2.7 Local planning authorities should consider through their development plans whether new sites should be identified in town, district, local or village centres for retail development, leisure development or other uses best located in centres. Uses which need to be accessible to a large number of people, including retailing, major leisure uses (such as theatres, multi-screen cinemas, bingo halls and bowling alleys), offices of central and local government, commercial offices, hospitals and tertiary education facilities are preferably to be located in town centres. Smaller scale retail provision, including appropriately sized supermarkets, leisure facilities, and other facilities such as local health centres, branch libraries, area offices of the local authority, and primary schools should preferably be located in district, local and village centres.

2.8 In deciding whether to identify sites for retail and leisure developments, local planning authorities should in the first instance consider whether there is a need for additional provision for these uses. Such need may be quantitative to address a provable unmet demand for the provision concerned. Precedence should be accorded to establishing quantitative need for both convenience and comparison floorspace particularly as a basis for development plan allocations before qualitative factors are brought into play. Qualitative assessment should cover both positive and negative implications. Where the current provision appears to be adequate in

quantity, the need for further allocations must be fully justified in the plan. This may be the case if new provision can be located where:

- it supports the objectives and strategy of an up-to-date development plan or the policies in this guidance
- it is highly accessible by walking, cycling or public transport;
- it contributes to a substantial reduction in car journeys;
- it contributes to the co-location of facilities in existing town, district, local or village centres;
- it significantly contributes to the vitality, attractiveness and viability of such a centre; or where
- it would alleviate a lack of convenience provision in a disadvantaged area.

2.9 If there is no need for further development for retail or leisure uses, PPW makes it clear that there will be no need to identify additional sites.

2.10 Whilst national planning policy has been updated a number of times since 1996, Technical Advice Note (Wales) 4: Retailing and Town Centres remains as a source of guidance to LPAs when preparing development plans. TAN4 notes that information on the retail industry in a local planning authority's area together with information on the functioning of their town centres will assist the preparation of development plans and the consideration of planning applications. Baseline information and time series data can provide a picture of change and a guide to future trends. Securing the co-operation of local businesses and their associations to collect information and to share their views is an important part of this process. Shopping catchment areas extend beyond local authority boundaries and an exchange of information with adjoining authorities is likely to be of benefit. Area wide information which might be useful includes:

- **Population change:** combined with retail expenditure, this can result in the identification of shortfalls and opportunities for new retail developments.
- **Retail provision:** the amount and distribution of different forms of retailing across a local authority area can provide a useful profile of the industry and assist in identifying the shopping hierarchy. Usually expressed as total gross floorspace, the main types of retailing identified are: convenience (mainly food) and comparison or durable goods, (clothes, DIY, electrical components, etc.). Outstanding planning permissions and known commitments should also be monitored.
- **Retail expenditure:** which can mean the amount of money spent on retail services in total or per person within the catchment area for a development, a centre, or local authority area. Changing local economic conditions will affect expenditure levels and therefore the retail health of existing centres and businesses.

2.11 Information of value in measuring vitality, attractiveness and viability of town centres includes:

- **turnover in relation to floorspace:** turnover figures vary greatly and can be of assistance as an indication of the relative activity of different shopping areas and centres;
- **commercial yield on non-domestic property:** (i.e. the capital value in relation to the expected market rental) may be of assistance in demonstrating the confidence of investors in the long-term profitability of the centre;
- **shopping rents:** pattern of movement in primary shopping area rents (i.e. the frontage which attracts the highest rental value);
- **retailer representation and change:** present representation and demand from retailers wanting to come into the town, or to change their representation in the town, or to contract or close their representation;
- **the diversity of uses:** how much space is in use for different functions, such as: offices; shopping; other commercial; cultural and entertainment activities; restaurants; hotels; educational uses; housing, and how that balance has been changing;
- **accessibility:** the ease and convenience of access by a choice of means of travel, including the quality, quantity and type of car parking, the availability of public transport services and the quality of provision for pedestrians and cyclists;
- **pedestrian flow:** the numbers and movement of people on the streets, in different parts of the centre at different times of the day and evening, and changes over time;
- **the proportion of vacant street level property:** vacancies can arise even in the strongest town centres, and this indicator must be used with care;
- **customer views:** regular surveys of customer views will assist authorities in monitoring and evaluating the effectiveness of town centre improvements and of town centre management;
- **environmental quality:** this should include information on air quality, noise, trees, landscaping, open spaces, litter and graffiti;
- **perception of safety/occurrence of crime:** this should include information on safety and security.

Local Retail Planning Policy

2.12 At present, retail policy at the local level is set by the JUDP for Pembrokeshire 2000 – 2016 (adopted 2006). Whilst the retail policies contained in the JUDP will be subject to review as part of the LDP-preparation process, the plan provides the current retail policy landscape at the local level.

- 2.13 The JUDP seeks to achieve the following through its retail policies:
- maintain and improve the range and choice of opportunities which underpin the vitality, viability, and attractiveness of existing centres;
 - improve the environment;
 - support the local economy;
 - provide for the needs of residents and visitors at accessible locations; and
 - reduce the need to travel.
- 2.14 The plan recognises the diversity of roles the town centres within Pembrokeshire provide as accessible locations for a range of uses which contribute to their vitality and viability. This includes services, leisure, entertainment, food and drink, residential, entertainment and the arts. The town centres in Pembrokeshire face competition from centres outside the County and from changing shopping opportunities such as the internet. The need to address this by increasing the competitiveness of centres within the County is a key aim of the plan.
- 2.15 The retail hierarchy is established by the JUDP. This identifies Haverfordwest as the principal centre within the County performing a sub-regional role. Policy 30 provides positive support for further retail and other town centre development at Haverfordwest provided the sequential approach is taken. This policy is identified as applying to the 'town centre core area' defined in the plan.
- 2.16 The plan takes a similar approach to the other defined town centres within the County. In addition to Haverfordwest, these include Fishguard, Milford Haven, Pembroke, Pembroke Dock, Tenby, and Narberth. In these centres, the plan seeks to encourage the further development of retail and other town centre uses, and establishes criteria (under Policy 31) to ensure that the vitality, viability and diversity of town centres are maintained and enhanced. Primary retail frontages are defined and the plan sets parameters (under Policies 31 and 32) to ensure that these are not eroded through inappropriate changes to non-retail uses (including residential). The plan suggests that in the majority of cases proposals that result in more than one-third of the retail frontage, or more than 3 consecutive units, being in non-retail use will be resisted.
- 2.17 With respect to allocations, the policy includes the identification of approximately 3ha of land at Kilgetty for a foodstore, and just over 4ha of land at Haverfordwest for a bulky goods retail park. The latter of these has been developed (Springfield Retail Park) but remains partially occupied. The plan sets definitive parameters for the foodstore at Kilgetty – 2450 sq.m. net floorspace, with a broad and extensive range, a high quality store design and layout, no concessions (i.e. pharmacy, dry cleaners, post office, photographic development, opticians, ATMs and banking services). Since the adoption of the plan, outline planning permission has been granted for a replacement Co-op store (following an initial application in 2004). This permission has yet to be implemented.

- 2.18 The plan also identifies a site in Withybush for car retail development. Again, this has yet to come forward.
- 2.19 Local centres are identified at Crymych, Kilgetty, St Davids, Neyland, Goodwick, Saundersfoot and Newport. The plan seeks to preserve these centres to serve local and daily shopping needs by allowing retail and service provision developments without undermining the role of the larger town centres. Policy 38 seeks to support proposals that are appropriate to the centre in scale, would not undermine the existing (or other) centres, and meet the sequential approach to site selection.
- 2.20 The plan also seeks to support other forms of retail development within the County (i.e. farms, business premises, petrol filling stations, and garden centres) provided these are appropriately located, sized (in terms of scale and function) and (where appropriate) ancillary to the primary use at the site.

Emerging Retail Planning Policy

- 2.21 PCC and PCNPA worked together to prepare the JUDP to provide a County-wide planning policy framework for Pembrokeshire. The two Authorities continue to work closely on matters of planning policy, but the PCNPA is preparing a standalone LDP for that part of the County that falls within its jurisdiction.
- 2.22 By its very nature, the retail sector operates over a wide geographical area, where market influences and development impacts are very much cross-boundary in nature. This needs to be reflected in development plan policies, and is particularly pertinent in Pembrokeshire where the PCC and PCNPA retail areas have historically functioned as one.
- 2.23 This section seeks to review the policy emerging from the Authorities at the time of the study.

Pembrokeshire County Council

- 2.24 Local Planning Authorities in Wales are required (under the Planning and Compulsory Purchase Act 2004) to prepare a LDP to replace the existing UDP system. Once adopted, the new LDP will set out PCC's policies and proposals to guide the development and use of land. Preparation of the LDP commenced in 2007 when the LDP Delivery Agreement was agreed with the WAG. The Authority invited the submission of Candidate Sites in early 2008, and consulted on Vision, Objectives and Options for the LDP in November 2008. Following on from this consultation, the Preferred Strategy for the LDP was issued in March 2009, and the resultant consultation closed in May 2009.
- 2.25 The Preferred Strategy for the LDP sets a number of objectives for the plan based on the LDP vision. These cover a range of issues including identifying land of community and housing

needs, improving connectivity, and supporting the area's cultural and linguistic heritage. A number of the objectives are relevant to retail planning matters and these include (LDP reference letters have been used for ease of recognition):

E. To direct development towards sustainable locations.

G. To facilitate people's accessibility to goods and services, by sustainable travel options where possible.

I. To develop a robust, diverse, competitive and sustainable local economy.

M. To facilitate the regeneration of Pembrokeshire's town centres.

R. To ensure high quality design which is sustainable and appropriate to its location.

2.26 A medium level of growth is preferred as the strategy for the LDP with land being made available for approximately 4700 homes over the plan period. This growth will be distributed evenly across urban and rural areas within a settlement hierarchy defined by the WSP's spatial framework and PCC's rural facilities survey. It identifies 'hubs' as the focus of growth in urban areas, and service centres /other centres with services in rural areas. The LDP strategy seeks to ensure that all new housing growth is matched by employment growth (in scale and distribution).

2.27 The Preferred Strategy states that retail policy coming through the LDP will strongly support the regeneration of town centres. The WSP Update identifies the complementary roles that centres within the Haven 'hub' will play, and this will be carried through into the LDP as context to the formulation of retail policy. Existing services within rural areas will be supported, as will enhancement where of an appropriate scale to the location concerned. Haverfordwest will remain as the sub-regional centre and County town and LDP policies will reflect this special role.

2.28 The roles and functions of the settlements within the Pembrokeshire – The Haven Spatial Plan Area, and their relationships with each other (and the hubs and settlements in the wider sub-region) have been considered in more detail as part of an emerging complementarity study commissioned by the WAG and Carmarthenshire County Council, PCC and PCNPA. The WSP defines three settlement hubs within the Haven Spatial Plan Area, these are Carmarthen, Fishguard (including Goodwick), and the Haven Towns (Haverfordwest, Neyland, Milford Haven, Pembroke Dock, and Pembroke). The complementarity study seeks to define key roles for the settlements within the Haven Spatial Plan Area and recommend ways in which these could be enhanced, but in a way which would contribute to the established vision for the area – a vision defined as:

A network of strong communities and settlements throughout the Spatial Plan Area, all of which fulfil their potential and are well related in physical and functional terms with facilities and services directed to those centres that are most able to serve the needs of the users within the Spatial Plan Area. All of these strengthened and complementary settlements will make a positive

contribution towards the achievement of the vision for the area that is set out within the Wales Spatial plan.

- 2.29 Within the PCC LDP Town centre areas will be defined for Haverfordwest, Milford Haven, Pembroke, Pembroke Dock, Fishguard and Narberth (in reflection of its niche market role). Each of these will be defined as a 'town centre' in the LDP, with Neyland, Goodwick, Crymych, Johnston, Letterston, and Kilgetty defined as 'local retail centres' (in recognition of their size and offer). New retail development will be directed to these centres in line with the sequential approach.
- 2.30 The LDP will also seek to ensure the complementary nature of the Haven towns (as identified in the WSP) is maintained. Each is considered to present a distinct retail and service offer and this will be encouraged to avoid unnecessary and potentially damaging competition.
- 2.31 The aims and objectives of the Preferred Strategy have been translated into strategic policies that will be taken forward into the Deposit LDP. The retail and town centre policies are included in Appendix C and include:
- Policy 14 – Retail – Main Retail Centres
 - Policy 15 – Retail – Local Centres
 - Policy 16 – The Role of Towns

Pembrokeshire Coast National Park Authority

- 2.32 PCNPA placed its LDP on formal Deposit in February 2009. Consultation closed on 22nd April 2009 with the period for further comments on the Alternative Sites put forward at Deposit stage closing on 29th July 2009. The Plan was submitted to the Welsh Assembly Government during December 2009. A consultation on Proposed Focussed Changes ended on the 10th February 2010. The Public Examination Hearing Sessions are scheduled for April / May 2010.
- 2.33 The Deposit LDP defines its retail objective as:
- “to maintain a vital and viable retail sector at an appropriate scale and at appropriate locations throughout the National Park.”*
- 2.34 The strategy for growth in the LDP is taken from the WSP Pembrokeshire Haven Settlement Framework Strategy. The strategic hubs within the Pembrokeshire Haven fall outside the national park area, with its settlements having lower order roles as Tier 2 or Tier 3 centres. The plan also proposes two additional lower tiers (4 and 5) to reflect the hierarchy and settlement function within the national park. These tiers are defined as follows:
- Tier 2: Centres have a service centre, employment and tourism function
 - Tier 3: Centres are principally local centres with some being significant tourism centres

- Tier 4: 'Rural Centres' are identified for limited growth. These Centres have a limited range of facilities which should meet the day to day needs of residents. This approach should help sustain rural communities and reduce the need to travel.
 - Tier 5: 'Countryside' where in accordance with national planning policy development is strictly controlled except for certain forms of development that would normally be found in a countryside location.
- 2.35 Each centre has a defined 'centre boundary' within which development will be permitted except where this is not compatible with the character of the Centre.
- 2.36 The settlement hierarchy within the national park is defined through this spatial strategy. It includes:
- Tenby as a local service and tourism centre; and
 - Newport, Saundersfoot, St. Davids and Crymych as local centres.
- 2.37 The plan sets land use priorities for each of the centres. In overall terms, these seek to protect and enhance the shopping function of each of the centres, ensure that housing and employment needs are met, protect the special qualities of the settlements, and to improve traffic management.
- 2.38 Within the Deposit LDP, three allocations are proposed in Tenby for mixed use redevelopment incorporating retail. In addition, planning permission has been granted for a mixed use development scheme in Saundersfoot which includes an element of retail. These allocations are as follows:
- Upper Park Road, Tenby - 0.01ha for mixed use (residential & retail);
 - White Lion, St/Deer Park, Tenby - 0.49 ha for mixed use (residential, retail, hotel and cinema)
 - Sergeants Lane, Tenby - 0.09 ha for mixed use (residential, workshops & retail);
 - Rear of Cambrian Hotel, Saundersfoot - 0.3 ha for mixed use (residential, retail & A3)
- 2.39 Policy 37 sets the retail hierarchy in the national park as follows:
- Tenby town centre
 - Newport, St David's and Saundersfoot District Centres;
 - Other smaller retail centres
- 2.40 The plan's retail strategy seeks to maintain the position of Tenby and the other district centres relative to each other and the larger centres outside the PCNPA area. Existing expenditure leakage from these centres is recognised, but as they are performing well, the plan will encourage the sympathetic regeneration of the centres to allow their current roles and functions

to be maintained. In line with WAG guidance, the LDP keeps policies on retail to a minimum by not repeating national planning policy.

- 2.41 Policy 38 – Town and District Shopping Centres defines the retail centre within each of these towns and, within Tenby, identifies the primary retail frontage. The policy seeks to encourage the development of appropriate town centre uses in these towns, to limit non-retail use in Tenby's primary frontage, protect amenity, and ensure development proposals are appropriately scaled, sited, and designed.
- 2.42 The LDP also recognises the role garden centres have within the County's retail offer. Policy 39 seeks to ensure that these are well located in relation to existing centres, and are of an appropriate scale for the location. The plan states that planning conditions will be used to limit the range of goods sold and net retailing floorspace.

3. RETAIL TRENDS

Introduction

3.1 To put our assessment of the quality of existing provision and the need for additional floorspace into context, it is relevant to consider the wider economic and social trends likely to influence retailing in Pembrokeshire. A number of trends are likely to have a bearing on the future pattern of retail provision in the County, and the opportunities arising from development proposals. This section examines key trends and drivers for change in the retail industry. We outline the key national trends in retailing and service provision of relevance to Pembrokeshire drawing from a range of published data sources, including research by Verdict Analysis and Mintel².

Demographics

- 3.1 Over the last 15 years, UK population has increased at a rate of approximately 0.4% pa, whilst the number of households has increased by 0.5% pa, as average household size has decreased to 2.34 (2006), with smaller families, more divorces, people living longer etc. These trends are forecast to continue and will affect spending habits, how much we spend, on what and where. In Pembrokeshire, population grew at a rate of just under 0.3% p.a. between 1991 and 2006, this is below the UK average, but higher than the average growth rate in Wales (approximately 0.2%). However, during this period the County's population aged over 65 grew by three times the national rate, whilst the 0 – 15 years population fell at a rate that was twice the national average³.
- 3.2 Over the next 20 years the 65 and over age group is expected to grow by 4.5m or 47% and the under 65s age group by only 8%. Older shoppers have a younger mindset than in the past, are more fashion aware and, in recent years, financially better off as a result of general house price growth as well as income growth (but post retirement income from pensions could be a concern if they do not achieve anticipated values). They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Clearly, the economic slowdown will impact upon disposable income and pension pots with more cautious spending patterns in the immediate future.
- 3.3 Younger shoppers will have higher education fees to pay, will experience higher housing costs, will be more computer literate and spend more on-line, and will spend more on entertainment/leisure so they may have less to spend in the retail sector.

² Verdict and Mintel are leading research specialists on the UK retail industry, providing independent research into all aspects and sectors of the retail industry

³ Pembrokeshire Economic Profile (July 2008) – Pembrokeshire County Council

- 3.4 At the Pembrokeshire level, the Retail Background Paper for the LDP (July 2008) has identified that, in overall terms, the County has a mixed population, with a higher than average proportion of affluent older people. The Paper also highlighted that there are significant groups of less affluent individuals, particularly in places such as Milford Haven and Pembroke Dock.

Income & Expenditure

- 3.5 Incomes and expenditure grew strongly during the last 20 years, with retail expenditure growing faster than incomes. Overall, retail expenditure has increased by about 3.9% pa in real terms over the last 20 years, with most of this growth on comparison goods rather than convenience goods, where growth has been less than 1% pa. Comparison goods growth had been close to 5.3% pa over the last 30 years, over 6% pa over the last 20 years and was even stronger over the last 10 years. However, circumstances have reversed this pattern of growth.
- 3.6 The extremely rapid deterioration in the economic performance during the final months of 2008 is having far-reaching implications for available income and consequently expenditure. The UK economy has contracted by a substantial 5.7% in real terms since this recession began in mid-2008. The weakness has been broad-based, with exports hit by the global downturn and domestic demand constrained by rising unemployment and weak sentiment (an indication of investors' confidence in the strength of the economy). The decline has been exaggerated by a record drawdown in stocks (a reduction in held stock levels). The manufacturing sector has been hardest hit, reflecting the slump in global demand. Construction remains depressed by a sharp fall in housing starts and the cancellation of many projects. The key services sector has also contracted, but at a gentler pace.
- 3.7 Household spending fell in real terms by 3.2% in the four quarters to 2009q1. The pace of decline accelerated from -0.4% in 2008q2 to -1.3% in 2009q1 as higher unemployment and slow growth in earnings hit spending. Experian estimate that spending fell a further 1% in the second quarter, taking the decline since the recession began to 4.2%.
- 3.8 Consumer expenditure on retail goods has been more resilient than total spending. The latest official retail sales data show spending in volume terms up 1.3% in the three months to June 2009. Experian believe this divergence between total consumer spending and retail expenditure reflects three major factors:
- consumers have cut back on big ticket items such as expensive holidays, household goods and cars, but continue to spend on other items
 - huge discounting has kept volumes up

- there has been a transfer of spending from services (hospitality, personal care and entertainment) to retail spending on items enabling these activities to be carried on in the home.
- 3.9 The cost to retailers' margins from discounting and the transfer of spending from service providers in the high street has been a factor underlying the substantial rise from 7% to 11.5% over the past year in the number of vacant shops, according to Experian data. Some of the largest failures have been in the bulky goods sector, which has suffered from the downturn in the housing market. Lack of working capital as a result of the credit crunch has also played a key role.
- 3.10 The recession has been severe, but is entering a milder phase. Business surveys have improved, with the services PMI even moving into growth territory in May. Recent evidence from the mortgage market also suggests that the ferocity of the downturn may be abating. However it is too early to confirm whether this improvement will be sustained while unemployment is rising and lending remains constrained.
- 3.11 Experian expect further albeit modest declines in GDP in the next few months, with the economy stabilising around the turn of the year, stemming from an end to heavy destocking; a reduction in the rate of decline in house prices; a more marked revival of lending to businesses and a modest pick-up in export demand.
- 3.12 The upturn when it develops in 2010 will be gradual and patchy as investment and household spending remain weak and the global economy revives only slowly. In year-on-year terms, the implication is that consumer spending will shrink by 3.5% this year and contract by a further 0.6% in 2010.

Medium-term outlook

- 3.13 **The medium-term outlook** is for much slower growth than was seen during the past 10-15 years. Experian expect GDP growth to average 2.0% a year in 2011-16 and consumer spending to average 2.2%. These rates compare with an annual average of near 3% in 1995-2007 for GDP and 3.2% for consumer spending.
- 3.14 The key reasons for this marked deceleration are:
- **Government finances have deteriorated sharply.** Recessions cut tax receipts and benefit payments rise. Bank bail-outs have exacerbated the fiscal deficit. Finances will remain under pressure even when the economy recovers, as an increasing number move into retirement, raising payments and reducing tax and National Insurance receipts. It is estimated that the government will have to find £40bn a year in the medium term through spending constraints and higher taxes. This will weigh down on consumer spending.

- **The sharp reduction in investment** (down 13% in the year to 2009q1) and cancellation or postponement of plans will inevitably depress medium-term growth prospects in many parts of the UK economy.
- There will be **no boost on the scale of what was seen in the past decade from consumer credit**. The banking sector will be more cautious and households' appetite for taking on credit will be less voracious as they seek to control their debts which are at historically high levels in relation to incomes. Moreover, savings are likely to be higher than in the past decade as job insecurity continues against backdrop of high unemployment and weak growth.
- **The main engines of growth in the past decade – financial and business services and the housing market - will be less buoyant**. London's financial services sector will be more tightly regulated and under pressure from centres in the Middle and Far East; a more subdued housing market will curb lending and real estate; and the now mature business services sector will not be able to repeat its 7.9% annual rate of expansion of 1995-2007.
- **Public spending - a key creator of jobs in the past decade – will be severely constrained**. This will prevent unemployment falling as rapidly as in the aftermath of the recession of the early 1990s.

Long-term outlook

- 3.15 While the economy may return to a stronger growth path in the second half of the next decade, Experian do not believe that it will repeat the exceptional performance of the period 1995-2007 as some of the issues constraining the medium-term outlook remain unresolved. Environmental factors including much higher energy costs will also constrain growth. Experian forecast GDP growth between 2016 and 2026 to average 2.4% a year.
- 3.16 Non-store retail sales, excluding e-tailing, are expected to decline over the next ten years, but this will be more than offset by the growth of e-tailing, resulting in overall growth in non-store sales in absolute and percentage terms. Total non-store convenience retail sales (including e-tailing) are expected to increase from 2.5% of sales in 2006 to 4.8% in 2013, rising to 6% in 2026, whilst total comparison non-store retail sales are expected to increase from 6.8% in 2006 to around 9.1% in 2013, before stabilising.
- 3.17 The impact of growth in e-retailing on future demands for retail floorspace is an important consideration and has been factored into the forecasts set out later in this report. Factors such as the processing of online grocery orders by retailers such as Tesco in local stores, and the potential use of shops as showrooms and/or collection points may mean that the growth in Internet sales will not necessarily lead to an equivalent reduction in floorspace requirements.

- 3.18 According to Verdict, as customers become more concerned about the economic outlook, they are becoming more selective in their purchasing habits. With rising living costs, disposable incomes are being squeezed, and as a result customers are shopping around more to find the best possible value. Increasingly retailers are finding it harder to please customers, and across all sectors, retailers are converting fewer customers into main users and shoppers are less loyal to their main stores.

Sales Efficiency

- 3.19 In undertaking retail capacity and impact assessments it is generally accepted that an allowance should be made for growth in the turnover 'efficiency' (or 'productivity') of existing retail floorspace to reflect what has happened in the past about retailers' ability to achieve productivity increases. Such an allowance also helps maintain the vitality and viability of town centre businesses.
- 3.20 This growth represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail planning studies.
- 3.21 Although hard quantitative evidence is limited, comparison businesses in particular have, over time, increased sales densities by achieving improvements in productivity in the use of floorspace. Analysis of past data is difficult as over the last 20 years sales densities increases have been affected by changes in the use of retail floorspace, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off events like Sunday Trading and longer opening hours, and the very strong growth of retail expenditure relative to the growth in floorspace.
- 3.22 Evidently, in the current economic climate many retailers have struggled to increase or even maintain sales density levels and, together with other financial problems, have led retailers into closure, such as Woolworths and Adams. With the expectation of weaker expenditure growth in the future than over the last 10 years, sales density growth is likely to be towards the bottom end of the range. Therefore, we are now incorporating a 1.3% efficiency rate for comparison retailing up to 2016 and 2% pa thereafter and a 0.1% efficiency rate for convenience retailing up to 2016 and 0.5% pa thereafter.

Employment

- 3.23 Over the last 20 years retail expenditure has increased at about 4% pa, but retail employment has increased much more slowly. Total employees in retail employment have increased from 2.2 million to 3.0 million, an increase of 1.5% pa. However, this growth has been in part time employees. Full time equivalent (FTE) employment has hardly increased at all, from about 2.1 million to 2.2 million, a 0.4% pa increase.
- 3.24 Over the next 15 years Experian Business Strategies (EBS) expect a marginal increase in FTE employment in the retail sector with a slightly higher increase in part time employment. Evidently, this needs to be monitored in the forthcoming years based on the slow down in the economy and corresponding growing levels of unemployment with significant consequences for available retail expenditure and retail sector employment positions.

Location

- 3.25 Strong income and expenditure growth has affected retailing in another important way – the rise in car ownership and mobility. In 1961 only 30% of households had a car (one or more cars) but only 2% of these had more than one car. With public transport (and walking and cycling) the dominant mode of transport, shopping choices were limited and distances travelled were short. By 1970 car ownership had increased significantly so that nearly 50% of households had one or more cars and the number of households with two or more cars had quadrupled but was still under 10%.
- 3.26 Currently about 77% of households have one or more cars and a third of households have two or more cars, a huge increase in mobility over the last 30-40 years. In Pembrokeshire, only 21.7% of households do not have access to a car, compared to 26.8% nationally. Households are now much more mobile than they were and therefore their choices of where to shop and the distances they can travel are much greater. These trends will continue but the rate of change may well diminish, particularly in light of the economic slow-down. It would seem likely, however, that levels of mobility will be retained although frequency of travel may decline as the number of cars per household may fall in the economic downturn. The growth in car mobility evidently puts pressure on parking provision in town centres and can lead to congestion with potentially knock-on detrimental impacts for town centres.
- 3.27 Increased mobility and affluence has favoured larger centres over smaller centres. As a result larger centres have increased in size and importance relative to smaller centres which has further reinforced the attraction of larger centres to more mobile shoppers. Smaller centres have, therefore, lost market share and have seen much less new development than the overall rate of

expenditure growth would imply. This is recognised by PPW, which urges local authorities to retain adequate provision in smaller centres.

- 3.28 Increased mobility and affluence has also stimulated out-of-centre development, which has grown much more rapidly than town centre development. Over the last 20 years the majority of retail development has been in edge or out-of-centre locations. This has led to increasingly restrictive planning policy in favour of town centres over the last 10 years, but only recently has the growth in out-of-centre development started to slow. This slow down is expected to continue, but Verdict still expect sales at out-of-centre locations to increase at a faster rate than at in-centre locations.
- 3.29 PPW reinforces town centre first objectives. The sequential site test is still a cornerstone of retail planning policy, favouring town centre sites and necessitating consideration of the disaggregation of retail park proposals so that smaller sites are considered. However, it is also recognised that individual retailers' business models are also relevant. Disaggregation of a retailer's proposed store does not now need to be considered if the operator can demonstrate it would adversely affect their business model.
- 3.30 In May 2006 the Office of Fair Trading (OFT) referred the supply of groceries by retailers in the UK to the Competition Commission (CC) for investigation under Section 131 of the Enterprise Act 2002. The CC published its findings in April 2008 and reported that "in many respects, competition in the UK groceries industry is effective and delivers good outcomes for consumers, but not all is well". The two main areas of concern highlighted were:
- 1) *that a number of grocery retailers have strong positions in several local markets. Barriers faced by competing retailers that could otherwise enter these markets mean that consumers get a poorer retail offer than would otherwise be the case, while those grocery retailers with strong local market positions earn additional profits due to weak competition in those markets, and*
 - 2) *the transfer of risk and unexpected costs by grocery retailers to their suppliers through various supply chain practices if unchecked will have an adverse effect on investment and innovation on the supply chain and therefore, on consumers.*
- 3.31 A number of steps to address the problems were posed including the recommendation of the introduction of a competition test as part of the planning process for new stores, to favour new retailers other than those which already have significant market shares in an area. This recommendation has been subject to a successful legal challenge by Tesco and a new version of the competition test was published in October 2009. The test should be applied to all grocery retail planning applications (extensions and new stores that resulted in stores with a net sales area of over 1,000sq.m. The Office of Fair Trading would be become a statutory consultee to the LPA and

would advise it whether a planning application passed or failed the competition test. The test is as follows:

The OFT would:

- (a) assess concentration across an area defined using a 10-minute drive-time isochrone (calculated using a standard, readily available software package) around the store that is to be developed;*
- (b) count the number of fascias (including that of the retailer that might operate the developed store) operating stores with net sales area of over 1,000sq.m. within the isochrone. The fascias would include all full-range grocery store operators;*
- (c) (Where the number of fascias is three or fewer) calculate the share of groceries sales area within the isochrone that the grocery retailer operating the developed store would have after the development had been implemented; and*
- (d) provide advice to the LPA on:*
 - (i) whether the applicant, being a large grocery retailer, had passed or failed the Test; or*
 - (ii) where a planning application was submitted by a third party, which grocery retailers would fail the Test.*

A retailer would pass the Test for a development within a particular local area (i.e. within a 10-minute isochrone around the development) if:

- (a) it was a new entrant in the local area;*
- (b) the total number of fascias in the local area was four or more; or*
- (c) the total number of fascias was three or fewer but the grocery retailer operating the development would have less than 60 per cent of groceries sales area in the local area.*

A retailer would fail the Test if:

- (a) the grocery retailer was not a new entrant in the local area;*
- (b) the total number of fascias in the local area was three or fewer; and*
- (c) the retailer would have 60 per cent or more of groceries sales area (including the new development) in the local area.*

A development that did not result in an increase in groceries sales area would still be subject to the Test, since planning conditions would be required to prevent an increase in groceries sales area in the future, but would pass it automatically.

In order to ensure the effective working of the Test, the OFT also recommend that:

- (a) the Department of Communities and Local Government (DCLG) and the devolved administrations took such steps as were necessary (including changes to planning policy) to ensure that when an LPA gave open A1 planning permission (which would allow any type of retail development), it should limit the grocery sales area in the development to less than 1,000 q.m. (as an anti-avoidance provision); and*
- (b) DCLG and the devolved administrations took such steps as were necessary to ensure that LPAs should take account of the OFT's advice on the result of the Test and should only approve applications that failed the Test in exceptional circumstances:*
 - (i) the particular development would produce identified benefits for the local area that would clearly outweigh the detriment to local people from the area becoming or remaining highly concentrated in terms of grocery retailing; and*
 - (ii) the development, or any similar development, would not take place without the involvement of a large grocery retailer that had failed the Test.*

3.32 The OFT has made its recommendations to both the WAG and the DCLG. It is not known at the current time whether the competition test will be introduced in Wales.

3.33 Recommendations were also made by the Competition Commission to try and prevent retailers using the control of land / sites in highly concentrated markets as a means of inhibiting entry by competing retailers. These steps would have implications on the potential new locations that some retailers could look to develop within.

Size of Units

3.34 The growth of multiple traders and increased competition between companies has meant that the retail structure is increasingly dominated by large companies requiring larger shop units. Shopping centres and out-of-centre development that has been able to accommodate this demand for larger sized units (typically 500-2,000sq.m. or larger) have grown in importance, reinforcing the trend of higher order centres and out-of-centre retailing growing in relative importance (i.e. polarisation in the retail hierarchy).

3.35 The growth in the size of stores has caused a contraction in the number of shop units and consumer choice. This is particularly evident in the food sector, with a marked decline in the number of smaller and more specialist food retailers (greengrocers, butchers, fishmongers, bakers etc), and a large increase of superstores. This is indicated by Verdict Research which shows a 31% reduction in the total number of convenience stores over the last 10 years, as space is concentrated into a smaller number of larger stores.

- 3.36 Whilst the number of superstores (>25,000 sq ft) has increased by 37%, food specialists and off licences/tobacconists have declined by 35% and 57% respectively. These trends may well weaken in the future due to possible market saturation of large foodstores and concerns over lack of competition due to the market dominance of a few key multiples.

Foodstores

- 3.37 A by product of the restriction of new development of large foodstores is the growth in applications to extend existing stores and the changing composition of floorspace within existing foodstores. There is an increasing emphasis on the sale of comparison goods at the expense of convenience goods, as expenditure growth rates for comparison goods are much higher than for convenience goods and margins are greater, although sales densities are often lower. This trend poses an increasing threat to smaller centres, as larger foodstores will increasingly sell a wider product range of day-to-day convenience and comparison goods and services. According to Verdict, non-food floorspace in the larger format stores of the top 4 grocers now accounts for between 28% (Morrisons) and 50% (Asda) of sales floorspace.

Shopping & Leisure

- 3.38 Due to increased affluence and mobility, and the rise of the internet, shoppers no longer merely shop to satisfy 'needs', they increasingly shop to satisfy 'wants' as well. Retailing in the higher order centres and the more attractive smaller centres is changing and arguably becoming more of a quasi leisure experience. Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure.
- 3.39 Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and multiplexes in larger centres, are therefore important to attract shoppers and encourage longer stays and higher spending. Better integration of retail and leisure facilities mutually benefits both sectors. Pedestrianised streets and covered retail areas are also important in attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking.
- 3.40 A number of factors have helped drive the growth of leisure provision in town centres. Planning policy is important as is the fact that urban living is fashionable. Town centres can offer consumers a much more vibrant atmosphere in which to eat and drink and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is 'daytime trade' and the ability to capitalise on proximity to businesses and shoppers.

Internet Shopping/E-Tailing

- 3.41 Online spending is growing at its fastest rate for six years, driven by convenience and low prices, and so far e-retailing is showing no signs of being affected by the recent economic downturn. According to Verdict (2008), the e-retail market grew by 35% between 2006 and 2007, which is considerably higher than the 3.6% growth in the total retail market, and e-retail is expected to continue outperforming the total retail sector over the next five years.
- 3.42 Worth £14.7bn in 2007, the online market is becoming an increasingly important contributor to retail, accounting for 5.2% of all retail sales, (up from 3.8% in 2006). Verdict's research found that almost 66% of UK households now have access to the Internet, with 55.5% having broadband access, which is making online shopping easier, faster and more reliable. As technology continues to improve, it will fuel further growth in the market. Overall the internet shopper population is forecast to grow by approximately 50% between 2007 and 2012.
- 3.43 The online market is dominated by the electrical and food & grocery sub-sectors, which between them account for around half of all sales. The food & grocery sub-sector, with rapid growth of 39.5% in 2007 is expected to overtake electricals in the top spot. Online clothing and footwear sales grew 38% during 2007, and with sales of £1.7bn, this is the UK's third largest online market.
- 3.44 Books are one of the online market's most mature sectors – having been present in the online arena for over a decade. The category came to prominence by Amazon back in 1995, culminating today in approximately £1 in every £7 spent on the category going through online. In 2007, the online book market grew by 15% to £504m, although was the lowest growth for four years indicative of the approaching maturity of the market. A number of potential developments regarding books are on the horizon which have the potential to alter the dynamics of the sector, notably the digitisation of books. The immediate impact of this development in the short term is limited, although should give traditional book retailers 'food for thought' regarding the creation of their long term strategies.
- 3.45 Although only accounting for a very small share of online spending, the market which saw the most dramatic online growth in 2007 was furniture and floor coverings, growing by 41% from £0.4bn to £0.7bn, despite the slowdown in the sector overall, with Ikea's launch of a transactional website being sited as one of the drivers of growth. The music & video sector continues to have the overall highest online market penetration at 30.8% of total sector sales, and this is forecast to double by 2012, which could have implications for physical store requirements.
- 3.46 As a consequence of this growth, there are huge pressures on retailers as the Internet has provided an attractive alternative for many consumers. Shoppers are selecting their own retail mix online and shopping centres need to compete with this choice, which is not only driven by price and

range, but also service and expertise. Town centres will increasingly have to provide a retail experience that the Internet and supermarkets are unable to match, and the market will respond in some way to the varying impacts on different retail sectors. In accordance with PPW, the emphasis should be on the overall town centre experience, the mix of uses, and not just the retail offer.

Summary

- Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. This has seen corresponding increases in sales densities within existing retail floorspace, which has also been driven by factors such as high value space efficiency and longer opening hours. Crucially, for PCC the current economic slow down will have an impact on the retail sector and growth forecasts will need to reflect recent publications from EBS.
- Heightened mobility through increased car ownership, alongside growth in affluence, has favoured larger centres over smaller centres. Shoppers are more willing to travel further a field to higher order centres which have increased in size and importance relative to smaller centres, leading to a consequent fall in their market share.
- The composition of town centres has changed through new development, with a growing number of companies requiring larger shop units to meet their shop format ratios. This has again favoured the larger centres which generally have the space to meet such requirements and are able to accommodate this demand. This is particularly noticeable in the convenience sector, which has seen a 37% increase in food superstores, but a 31% fall in total number of convenience stores over the last 10 years. This has led to current concerns in respect of lack of competition and market dominance.
- Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure – although this may change in the coming months. Nevertheless, the mix of uses in a town centre is vital to offer choice to shoppers, and quality restaurants, coffee shops, cafes, bars and other leisure facilities are all important to encourage frequency of visit and longer stay times.
- As competition from the internet increases, town centres need to offer a quality destination where people want to spend time and gain access to facilities not available on the web. There has been a continued polarisation towards larger centres and the provision of larger stores in these larger centres. Where smaller centres have been unable to diversify their offer or create niche markets and a mix of retail, leisure and service facilities they have suffered.

4. ASSESSMENT OF TOWN CENTRES

Introduction

- 4.1 The purpose of this section is to provide an assessment of the current state of retailing within Pembrokeshire and its relationship to surrounding areas, by providing a health check of the main town centres, including an overview of out-of-centre provision. Section 10 of PPW advises that development plans should establish the hierarchy of existing centres, including the identification of changing pressures and opportunities. TAN4 advises that information on the retail industry in a local planning authority's area together with information on the functioning of their town centres will assist the preparation of development plans.
- 4.2 Measurement of the vitality and viability of town centre health is achieved through a basket of tried and tested indicators. The information gathered for town centres is useful not only to inform the review of allocations and policies, but also for assessing the likely impact of retail development proposals. In line with the project brief agreed with PCC, the health of each of the eleven town centres in Pembrokeshire has been measured. The indicators (where data is available) which have been reviewed for each of these centres are:
- **turnover in relation to floorspace:** turnover figures vary greatly and can be of assistance as an indication of the relative activity of different shopping areas and centres. Given its relationship with the quantitative assessment of need, a review of this indicator is contained in Section 5 of this report;
 - **commercial yield on non-domestic property:** (i.e. the capital value in relation to the expected market rental) may be of assistance in demonstrating the confidence of investors in the long-term profitability of the centre;
 - **shopping rents:** pattern of movement in primary shopping area rents (i.e. the frontage which attracts the highest rental value);
 - **retailer representation:** present representation and demand from retailers wanting to come into the town, or to change their representation in the town, or to contract or close their representation;
 - **the diversity of uses:** how much space is in use for different functions, such as: offices; shopping; other commercial; cultural and entertainment activities; restaurants; hotels; educational uses; housing, and how that balance has been changing;
 - **accessibility:** the ease and convenience of access by a choice of means of travel, including the quality, quantity and type of car parking, the availability of public transport services and the quality of provision for pedestrians and cyclists;

- **pedestrian flow:** detailed counts have not been undertaken as part of the study, but observations were made during the retail centre surveys (undertaken in early September 2009) on the levels of pedestrian activity within the respective centres;
- **the proportion of vacant street level property:** vacancies can arise even in the strongest town centres, and this indicator must be used with care;
- **customer views:** regular surveys of customer views will assist authorities in monitoring and evaluating the effectiveness of town centre improvements and of town centre management;
- **environmental quality:** this should include information on air quality, noise, trees, landscaping, open spaces, litter and graffiti;
- **perception of safety/occurrence of crime:** this should include information on safety and security.

4.3 Information on the indicators of town centre health listed above has been gathered from a number of sources including PCC, PCNPA, EBS, the Valuation Office, and the Focus Database. This information has been supplemented by site visits to each of the town centres by GVA Grimley during August and September 2009. The results of the Pembrokeshire Shopping Survey, conducted Research & Marketing Plus in August 2009, and comprising household interview surveys, also offer an important contribution to the assessment of town centre health. Parts of these surveys have been specifically designed to elicit qualitative aspects of retail provision, including:

- which centres are considered main shopping centres;
- perceived positive and negative attributes of each town centre; and
- potential improvements which would encourage people to visit the town centres more often.

4.4 The indicators used to assess the health and relative performance of Pembrokeshire's settlements reflect those established by TAN 4. It should be noted, however, that due to the size and function of some of the centres, data (raw or comparable) is not readily available on a number of the indicators, particularly for retail rents and commercial yields.

4.5 A key influence upon the retail and town centre economies of Pembrokeshire is likely to be the tourism industry. Tourism has a significant financial impact upon the County's economy and a significant amount of expenditure is likely to be directed towards the town centres, a number of which are in coastal locations. The impact of tourism is likely to have the following effects on the local economy:

- In order to cater for the tourism market, it is likely that town centres within the County will possess a distinct selection of retail and service outlets. For example, centres may possess a

greater selection of gift shops or certain types of food/drink outlets to cater for staying or day visitors.

- As a consequence of this differentiated retail and service offer, there is a possibility that tourist-focused centres may experience fluctuations in their retail composition as those retailers who offer a specific style of product/service may only trade during the peak tourism months of the year. Therefore, there is a possibility that vacancies could rise in some centres during the winter (or off-peak) months. Due to the remit of our brief from PCC, it has not been possible to survey the retail composition of the town centres at different times of the year and we would recommend that further regular surveys are undertaken by (or on behalf of) PCC in order to study this issue more closely.
- In addition, a consequence of the tourism industry will be varying turnover levels within Pembrokeshire towns during the year. The research within this report estimates annual expenditure from local residents and the annual financial impact of tourism, so any peaks in expenditure / turnover are masked within our annual predictions. However, it is a reasonable assumption to predict that short term turnover rates for most retail and service sectors within Pembrokeshire will increase during the summer months and it is likely that certain types of trader will see a substantial proportion of their turnover gained during this period (which will counter-balance lower turnover levels during other times of the year).

The Sub-Regional Retail Hierarchy

The Existing Position

- 4.6 Pembrokeshire's settlement pattern reflects its character which is dominated by the coastline. The vast majority of the key towns and settlements within the County are located along either the coast or the Milford Haven Waterway, with the obvious exceptions of Haverfordwest and Narberth. A significant proportion of the population are found within the urban agglomeration centred on the Waterway which the Wales Spatial Plan 2008 Update (WSP) identifies as the third most populous area in south Wales.
- 4.7 Within the Pembrokeshire Haven WSP Area, three strategic hubs are identified – Carmarthen, The Haven Towns (Haverfordwest, Milford Haven – Neyland, Pembroke Dock - Pembroke) and Fishguard (including Goodwick). The WSP sees these areas as being of regional significance and as the focus for future growth and investment within the region. The hubs within Pembrokeshire are described as follows:
- The Haven Towns – Haverfordwest is seen as the County town and an important centre for retailing, services, health provision, and public administration. The WSP states that the town centre is under-performing and requires renewal centred upon the need to improve the town's retail performance, commercial premises, accommodation and leisure offer,

accessibility, and public realm. Milford Haven and Neyland are identified as a focus for property upgrade and improvement to provide safer, more attractive neighbourhoods and retailing areas. Pembroke and Pembroke Dock are seen as key areas of employment growth linked to the Waterway, with investment in local shopping and tourism provision, and the built environment identified as key priorities.

- Fishguard (and Goodwick) – viewed as important drivers to the economy of north Pembrokeshire but seen as in need of regeneration to respond to economic change.

4.8 When the wider region is considered, Carmarthen’s role and function will clearly exert an influence on the hubs within Pembrokeshire. Enhancements will be needed to Haverfordwest to maintain its status as the second largest settlement in the WSP area. The need for the enhancement and improvement of the town centre was identified as a key aim if Haverfordwest is to maintain its complementary relationship with Carmarthen.

4.9 In addition to these settlements, the WSP identifies Tenby and Narberth as medium-sized settlements with a service centre, employment and tourism function. Saundersfoot, St Davids, Kilgetty and Newport are identified as smaller settlements, some of which will have a significant role in the tourism economy. Linkage between these settlements and the strategic hubs is seen as critical to ensure that the benefits of growth are felt by the wider hinterlands. All settlements within the hierarchy have a key role to play in the overall attractiveness of Pembrokeshire as a place to live, work and visit. The WSP seeks to build on this to ensure that the centres develop complementary (rather than competing) offers to create the overall critical mass necessary to attract inward investment. The WSP hierarchy is as follows:

<ul style="list-style-type: none"> ▪ Tier 1 – Main settlements with a strategic role 	<ul style="list-style-type: none"> ▪ Haverfordwest ▪ Milford Haven / Neyland ▪ Pembroke / Pembroke Dock
<ul style="list-style-type: none"> ▪ Tier 2 – Medium sized settlements with a service centre role 	<ul style="list-style-type: none"> ▪ Fishguard / Goodwick ▪ Narberth ▪ Tenby
<ul style="list-style-type: none"> ▪ Tier 3 – Local / Tourism centres 	<ul style="list-style-type: none"> ▪ Kilgetty ▪ Saundersfoot ▪ St Davids ▪ Newport

Source: *Wales Spatial Plan Pembrokeshire Haven Key Settlement Framework 2021: Revised Draft for Officials Meeting 07-02-07 – prepared by Pembrokeshire Haven Drafting Group*

4.10 The settlement hierarchy identified in the WSP reflects that in the adopted JUDP (with the exception of Fishguard). This defines Haverfordwest, Fishguard, Milford Haven, Pembroke, Pembroke Dock, Tenby and Narberth as the main town centres and confirms Haverfordwest’s role as the administrative and shopping sub-regional centre for Pembrokeshire.

4.11 The latest policy expression of the hierarchy is provided by the background papers prepared by PCC and PCNPA as part of the evidence base to their respective LDPs. These provide the following retail hierarchy for the County (amalgamated by GVA Grimley):

<ul style="list-style-type: none"> ▪ Principal town centres (PCC) 	<ul style="list-style-type: none"> ▪ Haverfordwest (Sub-regional retail and service centre) ▪ Pembroke and Pembroke Dock (Secondary retail and service centre) ▪ Milford Haven ▪ Fishguard ▪ Narberth
<ul style="list-style-type: none"> ▪ Town Centres (PCNPA) 	<ul style="list-style-type: none"> ▪ Tenby
<ul style="list-style-type: none"> ▪ District Centres (PCNPA) 	<ul style="list-style-type: none"> ▪ Saundersfoot ▪ St Davids ▪ Newport
<ul style="list-style-type: none"> ▪ Local Retail Centres (PCC) 	<ul style="list-style-type: none"> ▪ Kilgetty ▪ Goodwick ▪ Neyland ▪ Crymych ▪ Letterston ▪ Johnston

4.12 At all policy levels, it is recognised that all centres, irrespective of their position on the hierarchy, have an important role to play as service and shopping centres for their wider hinterlands. In addition to retail, town centres provide business opportunities, health services, housing, educational opportunities, public transport, leisure and entertainment facilities, tourism attractions and a diversity of other uses which contribute to vitality and viability. In many cases, this is coupled with a significant tourism role within the County economy. A number of the smaller centres therefore perform a role which is disproportionate to their scale. It is therefore important that the overall complementary nature of the hierarchy is maintained.

Regional Retail Rankings

4.13 Looking wider than the County area, Table 4.1 below compares the main towns in Pembrokeshire with other regional and sub-regional centres based on their ranking from the VenueScore index.

4.14 Published by Javelin Group, VenueScore provides an up-to-date ranking of UK shopping centres based on a 'basket' of key retail indicators (e.g. scale, market positioning, fashionability and age positioning of the retail offer). The ranking is derived by attaching a score to each operator present in the town centre and this is weighted to reflect the overall impact on shopping patterns. It should

be noted that as the focus is on multiple retailers, towns with high levels of independent traders may not rank that highly. Pembrokeshire centres are shown in bold text.

Table 4.1: Regional Shopping Rankings

Tier/Centre	VenueScore Grade 2009	VenueScore 2009	VenueScore Ranking			Overall Change over time
			2005	2007	2009	
Swansea	Regional	217	69	66	60	↑
Carmarthen	Sub-Regional	101	223	219	228	↓
Llanelli	Major District	79	237	252	311	↓
Aberystwyth	District	63	421	407	382	↑
Haverfordwest	District	59	337	341	411	↓
Cardigan	Minor District	35	672	716	677	↓
Pembroke Dock	Minor District	25	1222	990	931	↑
Carmarthen (Stephens Retail Park) Way	Local	18	1960	1304	1256	↑
Tenby	Local	15	894	953	1475	↓
Lampeter	Local	13	1514	1626	1654	↓
Fishguard	Local	12	No data	No data	1754	↑
Milford Haven (Havens Head)	Local	12	1838	2096	1754	↑
Milford Haven	Local	No data	1148	1727	No data	↓
Withybush Retail Park, Haverfordwest	Local	No data	1362	1184	No data	↓

Source: VenueScore

- 4.15 The table indicates that Haverfordwest is the highest ranked centre in Pembrokeshire and is ranked considerably higher than the next town in the County – Pembroke Dock. VenueScore’s rankings are based on the quality of the retail offer, and those centres with high levels of multiple retailer representation generally score well. This is likely to be the reason for many of the County’s towns not featuring in the index as town’s with a score of less than 10 are excluded.
- 4.16 Over the last 4 - 5 years, Haverfordwest, Tenby, and Milford Haven have seen their rankings decline steadily, with the later two experiencing the greatest fall. Milford Haven has declined to the extent where it no longer features within the rankings, whilst Havens Head Retail Park has seen its rank increase over the same period. During that time, however, Pembroke Dock and Fishguard have both improved their positions (Fishguard was not present in the rankings before 2009). In the

case of Pembroke Dock, it is considered that the improved position reflects the expanding out-of-centre offer at the town for both food and non-food goods. Similarly, Fishguard's improved position could be a reflection of the opening of the Tesco store at Goodwick.

- 4.17 It is also evident from the table how the VenueScore ranking is affected by any changes in the quality of the retail offer. This is particularly the case for retail parks, where a period of refurbishment or redevelopment can see the rank plummet whilst units remain vacant, only for it to rise rapidly once the park is re-occupied. In this way, it is likely that Withybush Retail Park (which ranked well in 2007) will reappear in the rankings over the next two years once fully occupied (especially once the new Marks & Spencers store is trading).

Retailer Requirements

- 4.18 As part of the assessment of retail composition, a survey of the existing market requirements for representation in Pembrokeshire was undertaken. The exercise sought to quantify the level and type of current market interest by town centre occupiers (retail / leisure / food and drink) for new or additional floorspace provision within each of the main town centres. This was undertaken through an extensive review of requirements registered on commercial requirement databases (Focus, EGi Property Link, UK Retail Property Market, etc.) and the main headlines are summarised below.
- 4.19 The search exercise identified a number of current retailer requirements for representation within Pembrokeshire. Primarily, this interest was focussed on Haverfordwest, Pembroke, Milford Haven and Tenby, and was (in the vast majority of cases) for representation in prime frontage or 'in-town' locations. Haverfordwest and Tenby are the towns in the highest demand, followed by Pembroke and then Milford Haven. Although, the majority of the requirements are in the comparison goods sector (including fashion, pharmacy, electrical/phones/hi-fi, pet goods, and cosmetics, hair and beauty), there are also requirements for food and drink outlets, and convenience stores. Importantly, demand was evident from a number of well-known national multiples – these included Monsoon, The Body Shop and Superdrug.
- 4.20 There is also evidence of a relatively large number of other requirements throughout Pembrokeshire, but these have been entered on the property databases as part of general nationwide requirements. The list includes operators such as B&M Bargains, Argos, Leia, and KFC. This type of requirement needs to be treated with caution as it does not necessarily convey a desire for representation within a specific town. In light of this, the requirements listed above comprise those where the towns in question were specifically identified as targets for the retailers concerned.
- 4.21 If any need for further retail provision is identified within the County, these requirements will be useful to gauge if that is likely to be taken up.

Town Centre Composition

- 4.22 Two key indicators of town centre health provided within the 'basket' presented in TAN4 relate to the range of uses and the level of vacant units.
- 4.23 The diversity of uses within town centres provides an important indication of the overall function of those centres and the type of retail experience offered. The level of non-retail uses within a centre can highlight a declining retail function which in turn can reduce a centre's overall vitality and viability. Coupled with this measure, the proportion of vacant properties at ground floor level within centres can also provide an important signal of a centre's overall strength and performance. However, vacancies can arise for a range of underlying reasons and occur in even the strongest town centres, so this indicator must be interpreted carefully.
- 4.24 The proportions of centres given over to different uses, including vacancy, are considered for all towns within the County in this section. This approach allows comparative analysis of the towns to be undertaken providing a robust basis to identify any prevailing patterns that may emerge. It also allows for those towns faced with similar issues and performing similar functions to be identified.

Diversity of Uses

- 4.25 Information on the diversity of uses within the town centre boundaries has been obtained from the town centre survey work undertaken by PCC in June 2009. The data has been collected for the town centres as defined by the JUDP, with the exception of Haverfordwest for which the JUDP town centre core area was used. Land use plans for all the centres are included in Appendix D.
- 4.26 The retail composition of the eleven town and local centres in Pembrokeshire, in terms of the numbers of ground floor A Class units falling within the different types of town centre use in different retail uses, is set out in Table 4.2 below. As the table shows, there is considerable variation throughout the County.

Table 4.2: Type of Retail Provision - ground floor A class units (June 2009)

Town Centre	Comparison	Convenience	Service	Various	Vacant	Total
Haverfordwest	88	11	67	1	30	197
Tenby	71	12	81	0	7	171
Pembroke	36	7	58	0	18	119
Fishguard	30	8	43	0	19	100
Milford Haven	28	6	49	0	12	95
Pembroke Dock	30	3	45	1	15	94
Narberth	38	6	29	0	3	76
St Davids	29	5	31	0	3	68
Saundersfoot	20	7	19	0	5	51
Newport	8	5	12	0	4	29
Goodwick	1	3	11	0	4	19
Kilgetty	5	2	11	0	1	19

Source: Pembrokeshire County Council

N.B. table ranked in order of total units. Newport figures are taken from PCNPA LDP Background Paper.

- 4.27 In terms of unit numbers, the largest centre within the County is Haverfordwest, closely followed by Tenby. There is a relatively large gap in unit numbers before the next largest centre, Pembroke, which is marginally larger than Fishguard, Milford Haven and Pembroke Dock. The table presents the unit numbers for each centre, and as a result, centres which may not be classified in the higher bands of the retail hierarchy are found to rank fairly highly in overall unit numbers, e.g. Tenby, Pembroke, Fishguard. These towns are characterised by their historic street patterns and built fabric and typically offer a smaller average unit size than the more modern retail offers in Pembroke Dock and Milford Haven. Additionally, both Pembroke Dock and Milford Haven have a considerable retail warehouse type offer located outside the existing town centres – stores which will therefore have not been included in the survey data above. The smallest settlements within the County include Narberth, St Davids, Saundersfoot, Kilgetty and Goodwick (these last two both only have 19 units making them the smallest by a considerable margin).
- 4.28 In terms of out-of-centre / out-of-town retail provision, Haverfordwest, Milford Haven and Pembroke Dock all have an extensive offer. Although these are not included within the PCC survey information presented above, the presence of these retail warehouse stores will contribute to the relative attractiveness and function of the centres in question. The out-of-town provision for each of these centres is set out in Table 4.3 below.

Table 4.3: Out of Town Retail Provision (June 2009)

Town Centre	Retail Park / Store Address	No. of Units	Floorspace (gross sq.m.)	Occupiers (Remaining units vacant)
Haverfordwest	Bridge Meadow	4	7347	Morrisons / Halfords / Currys / (former) Allied Carpets
	Withybush	8	9497	Next / Comet / Laura Ashley / (forthcoming) Marks & Spencer /
	Springfield	7	9958	Homebase / Wickes / Carpetright / Pets at Home / Topps Tiles
	Salutation Square	1	1244	Aldi
	Fenton Trading Estate	1	4659	Tesco Extra
Pembroke Dock	London Road	7	13170	Tesco Extra / Argos / Peacocks / Brantano / Focus / Poundstretcher Extra / McDonalds
	Pier Road	2	2649	Lidl / Wilkinsons
Milford Haven	Havens Head	5	6007	Tesco / Boots / Peacocks / QS / Littlewoods Clearance / Poundstretcher
	Great North Road	1	1000	Lidl

Source: Pembrokeshire County Council

- 4.29 As the table reflects, Haverfordwest, Pembroke Dock and Milford Haven all have a significant out of town retail offer, with a number of high street multiples being present that aren't necessarily represented in the respective town centres. If the above are accounted for in terms of overall unit numbers, the gap between Haverfordwest and Tenby is increased, and Pembroke Dock and Milford Haven become more comparable with Pembroke.
- 4.30 In overall terms, the centre compositions are considered to reflect the importance of the centres to the areas they serve. It demonstrates Haverfordwest's importance as the County town, Tenby's importance as the principal centre within the National Park area in the south, and Fishguard's role as the primary centre serving the northern part of the County.
- 4.31 The proportions of ground floor A class units within each of the retail types are shown in Table 4.4 below. This also provides the UK averages for these retail types for comparative purposes.

Table 4.4: Type of Retail Provision: proportions of Ground Floor A Class Units (June 2009)

Town Centre	Comparison	Convenience	Service	Various	Vacant
Goodwick	5.26%	15.79%	57.89%	0.00%	21.05%
Saundersfoot	39.22%	13.73%	37.25%	0.00%	9.80%
St Davids	42.65%	7.35%	45.59%	0.00%	4.41%
Narberth	50.00%	7.89%	38.16%	0.00%	3.95%
Milford Haven	29.47%	6.32%	51.58%	0.00%	12.63%
Fishguard	30.00%	8.00%	43.00%	0.00%	19.00%
Pembroke Dock	31.91%	3.19%	47.87%	1.06%	15.96%
Pembroke	30.25%	5.88%	48.74%	0.00%	15.13%
Tenby	41.52%	7.02%	47.37%	0.00%	4.09%
Haverfordwest	44.67%	5.58%	34.01%	0.51%	15.23%
Kilgetty	26.32%	10.53%	57.89%	0.00%	5.26%
Newport	27.59%	17.24%	41.38%	0.00%	13.79%
GB Average	43.50%	9.51%	33.90%	N/A	11.85%

Source: Pembrokeshire County Council

*GB averages provided by Experian GOAD

- 4.32 The table shows that the highest proportions of convenience units are found in Goodwick, Saundersfoot, Kilgetty and Newport. All these towns were above the UK average for this type of unit and the proportions are considered to reflect their roles as convenience centres for their surrounding areas. In the case of Saundersfoot, this includes a high proportion of shops with a food-based tourist offer (e.g. confectionary), along with stores selling local produce – i.e. butchers, bakers, etc.
- 4.33 For the other centres within the County, the convenience offer is below the UK average, and in some markedly so. In Pembroke Dock, this is likely to be a reflection of the presence of a single large foodstore within the town centre.
- 4.34 There is an equal range of disparity across the County when it comes to comparison outlet proportions within the centres. Whilst the national average sits at 43.5%, there are a number of towns within Pembrokeshire considerably below this. Goodwick has a comparison unit proportion of just over 5% - a clear reflection of the size and function of that centre. Haverfordwest, Tenby, St Davids and Saundersfoot are broadly in line with the national average for comparison unit representation. Milford Haven, Fishguard, Pembroke Dock, Pembroke and Kilgetty all have similar levels of comparison unit representation but are all at least 10% below the national average. This

can be attributed to the low quality offer of Milford Haven and Pembroke Dock, and the higher levels of tourism offer (in terms of food and drink outlets) in Fishguard and Pembroke.

- 4.35 The highest level of comparison outlet representation is found in Narberth and this is clearly a reflection of its role as a niche independent centre. The offer within Narberth has a high proportion of arts, crafts, and fashion outlets.
- 4.36 High proportions of service uses typically indicate centres where the retail function is diminished. It also suggests high levels of A3 class (food and drink) uses, which in Pembrokeshire is typical of the towns with a more tourism-focussed offer. The centres which appear to have a dwindling retail function include Pembroke Dock, Milford Haven and Goodwick and Kilgetty. Although for the latter two centres the results are skewed by their small scale and local roles. Centres with a high level of service function which are considered to reflect their role as tourism destinations include St Davids, Pembroke, Saundersfoot and Tenby. Haverfordwest and Narberth have service representation broadly in line with the national average. Fishguard has representation approximately 10% above national average but this is considered to reflect its role as both a service centre for the north of the County and a tourism destination.
- 4.37 When the size of the centre in floorspace terms is considered, Table 4.5 below shows a similar pattern to the ranking based on unit numbers. Haverfordwest and Tenby are still the largest centres within the County area, closely followed by Pembroke. However, Pembroke Dock and Milford Haven are amongst the largest centres in floorspace terms due to the presence of large stores within the town centres themselves, particularly Asda in Pembroke Dock. Fishguard still ranks as the largest centre in the north of the County followed by St Davids. The presence of the Co-op foodstore in Kilgetty means that it has a total floorspace around 50% greater than Goodwick, which is the smallest centre considered by this report in the County. Saundersfoot and Narberth have floorspace extents similar to their local centre roles within the County hierarchy.

Table 4.5: Type of Retail Provision: ground floor A class floorspace (June 2009)

Town Centre	Comparison	Convenience	Service	Various	Vacant	Total
Haverfordwest	16456	2044	9788	1160	4588	34036
Tenby	7165	1345	10043	0	2773	21326
Pembroke Dock	3823	2680	6443	1568	3248	17762
Pembroke	4575	1501	8315	0	2584	16975
Milford Haven	3456	1094	5947	0	4308	14805
Fishguard	3518	1880	4260	0	2794	12452
St Davids	3443	1708	5587	0	306	11045
Narberth	2915	1079	3531	0	157	7682
Saundersfoot	1962	370	2320	0	978	5629
Newport	776	667	1626	0	402	3471
Kilgetty	792	1417	968	0	29	3206
Goodwick	72	796	1121	0	291	2281

Source: Pembrokeshire County Council

N.B. table ranked in order of total floorspace. Newport figures are taken from PCNPA LDP Background Paper.

- 4.38 In terms of the proportion of ground floorspace given over to the different A Class units, Table 4.6 below shows that Haverfordwest, as the principal County town, has a comparison floorspace offer far in excess of the other centres. Despite this, Haverfordwest still has a proportion of ground floorspace devoted to comparison goods of just under the UK average.

Table 4.6: Type of Retail Provision: Proportions of A Class Ground Floor Space (June 2009)

Town Centre	Comparison	Convenience	Service	Various	Vacant
Goodwick	3.17%	34.92%	49.16%	0.00%	12.75%
Saundersfoot	34.85%	6.57%	41.21%	0.00%	17.37%
St Davids	31.18%	15.46%	50.59%	0.00%	2.77%
Narberth	37.94%	14.05%	45.97%	0.00%	2.04%
Milford Haven	23.35%	7.39%	40.17%	0.00%	29.10%
Fishguard	28.25%	15.10%	34.21%	0.00%	22.43%
Pembroke Dock	21.52%	15.09%	36.27%	8.83%	18.29%
Pembroke	26.95%	8.84%	48.98%	0.00%	15.22%
Tenby	33.60%	6.31%	47.09%	0.00%	13.00%
Haverfordwest	48.35%	6.01%	28.76%	3.41%	13.48%
Kilgetty	24.71%	44.19%	30.19%	0.00%	0.91%
Newport	22.36%	19.22%	46.85%	0.00%	11.58%
GB Average	49.35%	17.28%	22.00%	N/A	10.35%

Source: Pembrokeshire County Council

*GB averages provided by Experian GOAD

- 4.39 The remaining centres are well below the UK average for comparison goods floorspace with Narberth, Saundersfoot, Tenby and St Davids being the centres coming closest to the UK average of just over 49%. As would be expected from the unit number analysis, Goodwick has the lowest level of comparison floorspace within the County. Interestingly, Narberth's proportion of units devoted to comparison floorspace is above the national average which highlights the number of small outlets within the centre.
- 4.40 As was the case with unit numbers, Milford Haven, Fishguard, Pembroke Dock, Pembroke and Kilgetty all suffer from low levels of comparison goods retailing, with Pembroke Dock being the lowest at just over 20%. This is the lowest proportion of ground floorspace used for comparison trading in the whole County, with the exception of Goodwick. Clearly low levels of comparison floorspace indicate centres which have developed much more of a convenience or service-type function and essentially perform as local centres rather than shopping destinations.
- 4.41 In terms of convenience floorspace, Newport, Goodwick and Kilgetty have proportions above the national average. This is a direct reflection of the presence of the Spar and Tesco Express located on The Parrog in Goodwick, and the Co-op in Kilgetty (which gives Kilgetty the highest convenience goods floorspace proportion in the County at 44%). Of the other centres, Pembroke Dock, Fishguard, St David's and Narberth have a proportion just below the national average. In

Pembroke Dock and Fishguard the presence of a single large convenience retailer within the centre (Asda in Pembroke Dock, Somerfield in Fishguard) will have had a large influence on this.

- 4.42 Haverfordwest, Tenby, Pembroke, Milford Haven and Saundersfoot all have convenience floorspace proportions considerably below the national average. Of these, Pembroke is the only town with a major foodstore (Somerfield) located centrally within the town centre, whilst Saundersfoot has a Spar. The Lidl store in Haverfordwest is located outside the core retail area of the town centre, but does lie within the broader town centre boundary currently defined in the JUDP. For the others, all are served by foodstores located outside the defined JUDP town centre boundaries, albeit in the cases of the Somerfield in Tenby and the Morrisons in Haverfordwest, these are edge-of-centre rather than out-of-centre stores.
- 4.43 In terms of service use representation, all centres within the County experience service use proportions in excess of the national average. Of these, Haverfordwest is closest to the national average of 22%, with Pembroke, Tenby, St Davids, Narberth and Goodwick being considerably in excess of that (more than double), and Pembroke Dock and Fishguard falling in the middle of this range. Again, in the Pembroke, Tenby, St Davids, Narberth and Goodwick, this could be attributable to a high proportion of tourism-related uses including restaurants, takeaways, cafés, sandwich bars, etc

Ground Floor Vacancy Rates

- 4.44 In terms of vacant retail units, the majority of towns within the County have vacancy rates above the national average of 11.85%. This includes Haverfordwest, Pembroke, Pembroke Dock, Fishguard, Milford Haven and Goodwick. Highest levels of vacancy are found within Goodwick and Fishguard which are close to 20%.
- 4.45 Vacancy rates for Pembroke and Haverfordwest should be treated with some element of caution, however, as there are clearly a number of existing buildings in the centres currently under-going refurbishment for potential re-occupation. It is likely therefore that in the next few years vacancy rates should experience a decline in these towns.
- 4.46 Positively, it is clear which towns are performing particularly well within their chosen roles based on the number of vacant units within those centres. St Davids, Narberth, Tenby and Kilgetty all have vacancy rates (in unit terms) considerably below the national average, indicating strength and vibrancy within these centres. The roles of these centres are already well defined with Narberth having the niche independent local trade role and offer, St Davids and Tenby having a much more tourism-orientated and heritage-based offer and Kilgetty being a convenience goods destination serving the local area. It is acknowledged that Kilgetty also has vacancy rates significantly below the national average for floorspace, but it is considered that this is skewed by the presence of a large foodstore within what is a very small town.

- 4.47 In terms of vacant floorspace levels, St Davids and Narberth experience vacancy levels considerably below the national average of 10.35%. Of the remaining towns, Haverfordwest, Tenby, Goodwick and Newport are slightly in excess of the national average, with Pembroke, Pembroke Dock, and Saundersfoot being between 5% and 8% above the average. The vacancies were particularly evident in both Pembroke and Pembroke Dock where a number of prominent buildings are vacant. This is more the case in Pembroke Dock which has two clusters of vacant retail units on Dimond Street, one of which comprises 3 large vacant retail units (including the former Spar and Woolworths stores).
- 4.48 Milford Haven and Fishguard are experiencing vacancy levels considerably higher than the national average. The highest level of vacancy in floorspace terms is found within Milford Haven which is just below 30% of total floorspace within the centre. The vacancy levels within Milford Haven and Fishguard were very evident when the centre visits were undertaken as part of this study and include a number of key and prominent buildings within those centres. In Fishguard, these include the Farmer's Arms and a former nightclub on The Square, and the former Woolworths store in Milford Haven.

Conclusions on Town Centre Composition

- 4.49 The above analysis highlights that Haverfordwest and Tenby are the dominant centres within the County and are performing relatively well in their roles and are, in broad terms, offering a mix of retail uses in line with the national average. Other centres such as Narberth, St Davids and Fishguard are meeting their identified roles within the County retail hierarchy, and this is reflected in their retail compositions. For the remaining centres, a dominance of service provision is evident, with the result that other provision is below average. In Newport, the level of comparison provision is less than half the UK average. In Pembroke, both convenience and comparison provision are at levels close to half of the UK average, and a similar situation exists in Saundersfoot. Both Kilgetty and Goodwick are dominated by convenience provision that is roughly twice the UK average which reflects the foodstore presence within both towns (Co-op and Tesco respectively). Milford Haven and Pembroke Dock appear to be experiencing erosion of their retail function, which is a likely reflection of the out-of-centre offer in both those centres.
- 4.50 The high vacancy levels within some centres are a clear cause for concern that will need to be tackled on an urgent basis, particularly Milford Haven where levels are excessively high. Of the remaining centres, for example Pembroke Dock and Pembroke, vacancy rates are above the national average but not substantially so, with many properties, particularly in Pembroke, currently undergoing refurbishment work. It is anticipated that completion of these works should see vacancy levels fall.

Haverfordwest Town Centre

- 4.51 Haverfordwest is the principal sub-regional centre in Pembrokeshire. Located in the geographical heart of the County, the town is identified in the JUDP as having an important role as the administrative and retail centre for the County, providing a range of shopping and leisure attractions.
- 4.52 At all policy levels, the town's under-performance is highlighted and its renewal is clearly a key objective. Improvements are required if it is to compete with similar larger centres outside the County boundary and these need to focus on improving the town's retail performance, its commercial premises, accommodation and leisure offer, its accessibility, and its public realm.
- 4.53 A regeneration framework for the town has been commissioned by PCC, but this has yet to be finalised. It is understood, however, that the framework will identify a series of key objectives to improve and reinvigorate the town which will be taken forward into a more detailed regeneration strategy. This strategy will seek to improve the town's retail offer, enhance its overall visual appearance, maximise the potential of the river and secure the investment necessary to regenerate and renew its built fabric.
- 4.54 Haverfordwest is identified as a target for the development of a diversity of new shopping facilities. The JUDP seeks to ensure that any (re)development follows a sequential approach, utilises existing town centre property wherever possible, and makes a positive contribution to the town.
- 4.55 A key consideration for any development or regeneration scheme within Haverfordwest will be flood risk. The River Cleddau runs through the town centre and as such the impact of flooding and the ability to mitigate against this will be central to the preparation of any proposals for this part of the town. The potential influence of flood risk in the town centre was identified in the Strategic Flood Consequences Assessment undertaken by Atkins on behalf of PCC. The study considered flood risk at the strategic level to identify those areas of the town centre where flood risk could be a significant constraint to development. Of the areas assessed by the study, only areas on the right bank of the river, and at Bridge Meadow Retail Park were found to be compliant with the indicative guidance provided by TAN15. As the study acknowledged, its purpose was to identify the type of development that may be appropriate in different areas of the town centre, but detailed recommendations on mitigation were not provided as any development coming forward would need to be subject to its own site specific Flood Consequences Assessment. In this light, further detailed assessment work will clearly be required if town centre redevelopment / regeneration proposals are to be advanced.

Commercial Yields

- 4.56 As a measure of retail vitality, commercial yields on retail floorspace are a valuable indicator, but one that needs to be used with care. The level of yield on its own is of less value than in

comparison with other yields at different points in time and in different locations. Yields measured consistently over time can give an indication of the direction in which a particular town centre is moving. This trend can be compared with national levels of yield and with those towns of a similar size and type, or with neighbouring and competing towns. In short, the lower the yield the better the performance of the centre, as it signifies a higher investor confidence in the centre. A comparative analysis of this type, conducted on a regular basis, can give an indication of how the viability of retailing in a town centre is changing. Table 4.7 below outlines the yields for Haverfordwest between 2002 and 2008, and towns within the wider region.

Table 4.7 Commercial Yields on Retail Property, 2002-2008

Centre	2002		2003	2004		2005		2006		2007		2008	
	Apr	Oct	Apr	Jan	Jul	Jan	Jul	Jan	Jul	Jan	Jul	Jan	Jul
Swansea	6.75	6.75	6.75	6.75	6	6	6	6	6	6	6	5.75	5.75
Carmarthen	7.5	7.75	7.75	8	7.75	7.5	7.5	7.5	7.5	7	7	7	7
Llanelli	8.5	8.5	7.5	7.5	7	7	7	7	7	7	7	7	7
Haverfordwest	8.5	8.5	8.5	9	8.5	8.5	8.5	8.5	8.5	8	8	8	8
Cardigan	>=10	9.5	9.5	>=10	9.5	9.5	9.5	9.5	9.5	9.25	9	9	9

Source: Valuation Office Agency statistics

- 4.57 The table indicates that yields in Haverfordwest have fallen (i.e. improved) in recent years. This improvement and its current position reflect the centre's role and position in the regional shopping hierarchy. Yields are consistently lower in Carmarthen and have improved at a greater rate in Llanelli. This suggests both these centres are performing strongly due to either a higher quality offer and / or a larger catchment area. This could, however, be a reflection of recent out-of-centre developments within those towns as much as in-centre. Haverfordwest does consistently outperform Cardigan in terms of investor confidence.

Rental Levels

- 4.58 The PCC Background Paper for the LDP: Retail (July 2008) provides evidence on retail Zone A rental values based on data published by Colliers CRE. Haverfordwest is the only town in Pembrokeshire included in the research and shows rental levels in the town to be at £50psf in 2007. This is slightly below the levels experienced in Llanelli and Aberystwyth and considerably below the level for Carmarthen (£90psf).

Structure of the Town Centre

- 4.59 The town centre is defined by the JUDP as covering a substantial area of the town – this includes significant areas of residential and other non-retail property. Within this area, a more focussed town centre core is defined. It is this core area which is considered to represent the town centre in Haverfordwest and the centre boundary should be reduced accordingly (which may be considered as part of the preparation of the emerging LDP).

- 4.60 The defined town centre comprises a low-lying area around the River Cleddau. This area includes the Riverside Quay Shopping Centre, Swan Square, Bridge Street, Picton Place, Victoria Place, Old Bridge, Castle Square and Quay Street. Within this area, Bridge Street, Riverside Quay and Castle Square are identified as primary retail frontage, with Picton Place and Victoria Place providing a more service orientated offer.
- 4.61 The town centre rises from the river along High Street to the west, where vacancy rates are high and concentrated in the area where High Street meets Dark Street Lane and St. Mary's Street. This provides the link between the centre's primary frontage and Market Street, which has, and is currently subject to, on-going works of renewal and refurbishment under the Townscape Heritage Initiative.

Retailer Representation

- 4.62 Within the town centre it is clear the most commercially vibrant areas are situated on either side of the River. These include existing units at Riverside Quay along with the shops along Bridge Street. This area also has a very low proportion of service uses and vacant floorspace.
- 4.63 Haverfordwest benefits from a high level of representation by well known multiple retailers. The proportions within the town are certainly higher than any other town within the County. The town also has a large number of multiple retailers represented on the out of centre retail parks to the north of the town.
- 4.64 Within the town centre itself multiple retailers represented include Specsavers, Wilkinson, Thorntons, Evans, Clinton Cards, WH Smith, Argos, Boots, JJB Sports, Dorothy Perkins, Accessorize, Milletts, New Look, Iceland and Superdrug. All the major financial institutions are represented within the town, these include Nat West, Barclays, HSBC, Lloyds TSB, Halifax, Abbey National and Nationwide.
- 4.65 The centre includes a number of service outlets, including 9 estate agents along with a variety of public house, restaurant, and other food and drink uses. The remainder of the centre is made up of independent uses (including the Ocky White's department store) and/or lower order multiples. These include operators such as Shaws, Julian Graves, Bon Marche, Game, Phones4U, The Orange Shop, Birthdays, Timpson, Holland & Barratt, and The Edinburgh Woollen Mill, along with charity shops such as Tenovus and the British Heart Foundation.
- 4.66 Haverfordwest also has a high level of foodstore representation within and outside the town centre core area. Iceland is located within the defined town centre, with Morrisons and Lidl (the latter of which falls within the wider town centre defined in the JUDP) occupying edge of centre sites. Iceland is the only major foodstore within the town centre, and its offer is supplemented by local convenience traders and the convenience offer of the Wilkinsons store at Riverside Quay. Outside

the defined centre, there is an Aldi at Salutation Square and a Tesco Extra store located to the west of the centre, and accessed from Portfield Road and Milford Road.

- 4.67 The Morrisons foodstore lies to the north of the town centre within the Bridge Meadow Retail Park. This park also includes comparison goods retailers - Halfords, Currys and (formerly) Allied Carpets.
- 4.68 There is an additional comparison goods offer on the Withybush Retail Park and the Springfields Retail Park, which lie to the north of the centre on Sydney Rees Way (A40). The Withybush Retail Park has recently undergone substantial refurbishment, and current occupiers include Next, Comet and Laura Ashley. It is also understood that the unit at the entrance to the park which is currently under refurbishment will be occupied by Marks & Spencer.
- 4.69 The Springfield Retail Park lies north of the Withybush Retail Park and has a bulky goods offer. Current occupiers include Homebase, Wickes, Carpetright, Pets At Home and Topps Tiles. There are two remaining vacant units on the park.
- 4.70 Within the wider urban area of Haverfordwest, concentrations of quasi-retail uses are also evident. These are located predominately on Snowdrop Lane and Old Hakin Road. It is noticeable however, that whilst Snowdrop Lane has more of retail centre character (with service, comparison and convenience goods outlets), the majority of units in these locations are more akin to trade centre parks / industrial estates.

State of Town Centre Environmental Quality

- 4.71 The vast majority of Haverfordwest town centre (as defined by the JUDP) is covered by a conservation area designation. This area also encompasses the majority of the reduced town centre area defined in the emerging LDP.
- 4.72 The majority of buildings within Haverfordwest town centre are in a reasonable state of repair, however, there is a clear difference between the historic area of the town centre which is centred on High Street, Castle Square and Bridge Street relative to the modern retail development at Riverside Quay.
- 4.73 The presence of the river within the centre is considered to add to the overall environmental quality of the centre and, flood constraints allowing, this could be capitalised upon and used as the focus to create more effective links between Riverside Quay and Bridge Street. Riverside Quay already has an aspect onto the River and if a similar relationship could be established between the retail uses and the river on the Bridge Street side, this could greatly enhance both the centre and links across the river. Positively, the Strategic FCA undertaken by Atkins concluded that the west bank of the river was one area that was relatively unconstrained by flood risk.

- 4.74 A number of the historic buildings within the town centre have secured grant assistance under the Townscape Heritage Initiative (THI). This initiative is sponsored by the Heritage Lottery Fund and seeks to achieve three key aims: repair historic buildings, reinstate missing architectural detailing, and bring vacant floorspace back into use. Works are ongoing on a number of key landmark buildings within the centre including Shire Hall, Commerce House and the Foley House Car Park. The impact of the THI programme is evident in Market Street which has a greatly improved and recently refurbished public realm along with a number of buildings which have clearly been enhanced by recent repair / refurbishment work. The works undertaken have demonstrably enhanced the overall quality and attractiveness of the built environment in this part of the town centre. The potential exists for a similar impact to be achieved along High Street where a number of buildings are either currently undergoing refurbishment work or are eligible for grant assistance to undertake such work.
- 4.75 The regeneration strategy prepared for Haverfordwest identified a need to focus on the renewal of the town centre. The THI is already achieving this in the Market Street and High Street area and this impact should be used as a catalyst to enhance the remainder of the town centre.

Pedestrian Flows

- 4.76 Haverfordwest appeared busy at the time of the survey visit (a Tuesday during September 2009). The busiest areas of the town were Riverside Quay, Swan Square, Bridge Street and Castle Square. Although numbers declined outside these core areas, pedestrian activity was evident throughout the centre. Importantly, moderate levels of movement were observed along High Street as pedestrians travelled from Castle Square to Market Street. This suggests that the vibrancy and offer of Market Street (which has been improved in recent years) is pulling people past the concentration of vacant units along High Street.

Accessibility

- 4.77 Bus services link Haverfordwest with other centres in Pembrokeshire and surrounding settlements. The bus station is located beside Riverside Quay Shopping Centre and consists of six bus stops with two additional bays for coach drop off/pickup. The town is also served by a circular bus service which links the town centre with the town's schools, the leisure centre, Tesco, Lidl, Withybush Retail Park and the station.
- 4.78 Haverfordwest has a railway station, which is located to the east of the town centre. The station links the town with Carmarthen and the Swansea – Paddington mainline beyond that. The town benefits from relatively regular train services (hourly at peak times, two hourly at others) to the long distance routes.

- 4.79 The town lies at the confluence of A40, A4076 and A487 roads as well as several rural B roads. The A40 connects Haverfordwest with Carmarthen to the east and Fishguard to the north; the A4076 connects Haverfordwest with Milford Haven to the south; the A487 connects Haverfordwest with St David's to the northwest.
- 4.80 Car parking within Haverfordwest town centre is provided in the following locations:
- Riverside Quay Multi-storey
 - Riverside Quay surface level car park
 - Castle Car Park
- 4.81 These facilities are located around the core retail area and offer good accessibility by private car and allow shoppers a short walk to nearby shops and services. There is a prevalence of provision around Riverside Quay, however, and whilst it is acknowledged that the Castle Car Park serves the High Street and Market Street area, it is in a relatively shielded position and could be more effectively linked to the retail areas of the town.

Customer Views and Behaviour

- 4.82 The results of the household shopping survey provide a good indication of how Haverfordwest is viewed by those people that use the centre. The survey sought to identify what people liked and disliked about the town and what improvements they would like to see to make them visit the town more often. Similar questions were asked for each town centre in the study and these are reported in the relevant sub-sections accordingly. For Haverfordwest, those using the town centre were clear that the town's convenience was its principal benefit. Closely behind this, people felt that the selection and choice of both multiple and independent retailers were also positive aspects of the town. Other factors mentioned included the compactness of the centre and the ease of parking.
- 4.83 In terms of what the people using Haverfordwest dislike about the centre, the largest majority (close to 40%) said there was nothing they disliked about the town. Of the remaining respondents, nearly 20% felt that car parking was difficult within the town centre and that there was a poor selection of multiple retail outlets. Just over 7% of those using the town centre stated that the town's unattractive environment was their principal dislike.
- 4.84 With respect to the improvements that those using the town centre felt could be made to persuade them to visit it more often, the most popular response was more parking spaces and an improved choice of multiple retail outlets. It should be noted that 32% of respondents felt that there was nothing in particular that could be improved to make them visit the town more often. Other popular responses included the presence of a Marks & Spencer store in the town (just under 10% of respondents wanted this).

- 4.85 Clearly Haverfordwest is well liked by the people currently using the town centre, particularly for its range of shopping opportunities. However, the responses suggest that some people still feel that the range of multiple retailers present within the town could be expanded and improved.

Conclusions

- 4.86 Overall, Haverfordwest is a town centre that is surviving but as a sub-regional centre and County town, it needs to strengthen its performance. The town centre environment is in need of renewal and the offer could be enhanced by attracting new, better quality retail representation to the town, with a focus on the town centre.
- 4.87 The LDP should seek to identify the true town centre area (as opposed to the wider area defined in the JUDP) to provide a focus for renewal initiatives and new retail development. Opportunities exist for retail-based redevelopment within the centre including land to the north of Swan Square, the existing market hall, and the car park adjacent to the castle (which offers a potential link into the town centre through the site of the former Woolworths store). These sites are discussed later in this section of the report.
- 4.88 The physical renewal of High Street and Market Street is currently in progress through the Townscape Heritage Initiative, which leaves a need to define a strategy for the Bridge Street / Riverside Quay area. Through renewal of the built fabric and higher levels of occupancy, High Street could perform an important role within the town centre as a link (based potentially on service and food and drink uses) between the primary frontage and the Market Street / library area of the centre.
- 4.89 The centre would benefit from the presence of some higher order national multiples to boost its offer and attractiveness as a retail centre, and to combat the out of centre retail offer provided at Witybush Retail Park (which has Next, Laura Ashley, and (soon) Marks & Spencer). A comprehensive strategy is therefore required to deliver the renewal of the built fabric, introduce higher order retailers (potentially through redevelopment) and tackle the prevailing vacancy rates. The focus must, however, be on the town centre.

Tenby Town Centre

- 4.90 Tenby is the largest town centre within the Pembrokeshire Coast National Park Authority's Administrative area, and is identified as such in the retail paper to PCNPA's LDP. The town is identified as a Tier 2 settlement in the WSP Update and this has been carried into the retail hierarchy proposed for the emerging LDP, in which Tenby is seen as having a role as a local service and tourism centre.

- 4.91 In terms of its relative size, Tenby is the second largest town centre in the Pembrokeshire area (i.e. the combined County and National Park). It occupies a position in the retail rankings above a number of the higher order (Tier 1) settlements in Pembrokeshire and appears to be performing better than those centres in terms of vacancy levels. It is also one of the few towns within Pembrokeshire for which current retailer interest was evident.
- 4.92 Tenby has a high proportion of service retail uses within the centre, which is to be expected given its tourism role. However, the retail composition of the town is much closer to the national average for numbers of units than for floorspace where there is a significant over-provision of service uses and an under-provision of comparison goods outlets. The town clearly benefits from its tourism role and should continue to maintain this, but the town does appear to have the potential to serve a catchment beyond its immediate local area.

Structure of the Town Centre

- 4.93 The town centre area identified on the Proposals Map of the adopted JUDP, covers a wide area fronting onto North Beach to the north and east, South Cliffs to the south and along Upper Park Road to the west. Within that area, a diverse range of uses are located including retail, hotel and leisure uses, and residential. This diversity will be reduced through the LDP as the defined town centre boundary is proposed to be tightened to focus on the retail centre of the town. The proposed amended centre will exclude the Sainsburys store and other units at Upper Park Road, along with a significant part of the southern part of the town (including parts of Lower Frog Street, St Mary's Street, and properties on the south side of St Julian's Street).
- 4.94 The core retail area is at the heart of the identified town centre and is focused along High Street, Upper Frog Street, St George's Street and Tudor Square – this corresponds with the primary frontage defined in the JUDP (and the emerging LDP). The traditional town centre was built within the original walled town area, which abuts the harbour area. This area is characterised by a narrow street layout, which is subject to varying levels of pedestrianisation. The vast majority of retail and service units within the town centre are located within pre-war terraced units, the ground floors (and sometimes upper floors) of which have been converted from residential accommodation.
- 4.95 Concentrations of secondary frontage are also found along South Parade, Upper Park Road, White Lion Street and St. Julian's Street, all of which are located outside of the traditional walled town area, where the retail uses are interspersed with leisure, hotel and service uses.

Retailer Representation

- 4.96 The town centre includes a number of key high street multiples, including Boots, Peacocks, W H Smiths, New Look and Shoe Zone (the only new multiple to come to the town centre since 2004).

The majority of these are located along High Street. There are also a number of high street banks including Barclays, Lloyds TSB and HSBC. The majority of retailers are local independents, reflecting Tenby's historical character.

- 4.97 Tenby's convenience offer consists predominantly of small local independent traders, selling a specialist range of convenience products (i.e. butchers, bakers, greengrocers, confectionery tobacco & news (CTN) / convenience stores). Outside these, the town has a single (moderately-sized) foodstore – Sainsbury's on Upper Park Road. This is the only store in the centre providing a reasonably wide range of products, and offering a bakery and deli counter. Interestingly, whilst the number of convenience stores in Tenby is broadly in line with the national average (of 17%), it has less than half the national average in terms of convenience floorspace, which suggests a potential area where the town's offer could be strengthened.

Rental Levels

- 4.98 Rental values for retail space are assessed by the Valuation Office, but due to its size figures are not available for Tenby. However, the PCNPA purchased data from the VO in 2000 which showed rental levels in Tenby to around mid-way between those in Haverfordwest and Pembroke Dock. PCNPA's Retail Background Paper for its LDP (January 2009) confirms that these levels rose up to 2003, suggesting that rental values in Tenby were relatively strong, but no further data is available.

Pedestrian Flows

- 4.99 Tenby town centre is clearly a vibrant centre in terms of pedestrian movement. This was evidenced by the number of people using the centre at the time of our site visit. It was observed that the demographic included a large proportion of tourists which is consistent with one of the recognised (and principal) functions of the town.
- 4.100 Flows were particularly high between the multi-storey park on Upper Park Road (Sainsbury's), South Parade and St George's Street as people made their way from the car park to the core retail area of the town. Within the town itself, the highest levels of pedestrian activity were observed along St George's Street and High Street. It was also evident that the natural circuit that the town's street pattern provides (St George's Street – High Street – Upper Frog Street) is well-used.

Accessibility

- 4.101 The main access to the town centre by car is available from the A478 Narberth Road and from the south and west via the A4139 Marsh Road. Accessibility to the centre, particularly the retail core, is constrained, and traffic congestion in the summer months (during the peak tourist centre) is understood to be a significant issue.

- 4.102 There are a number of car parking facilities serving the town centre at Upper Park Road (adjacent to Sainsbury's), Butts Field, Salterns, and Rectory Field and South Beach. The car park at Upper Park Road is multi-story on four levels, whilst the remainder are surface level. The car parks are generally always full by around 11am during peak season, and the PCNPA operate a park and ride service from Salterns and Butts Field car parks during peak season when the pedestrianisation order is in effect. The form of car parking provision may change in the future, however, as the Butts Field and Rectory Field car parks are subject to allocations for residential redevelopment in the emerging LDP. The plan requires that any redevelopment proposal on those sites will need to deliver appropriate levels of public car parking.
- 4.103 The town is served by frequent bus services which operate 7 days a week, all year round. These services connect the town with the local area, and also with Pembroke Dock, Haverfordwest, Kilgetty, Saundersfoot and Carmarthen (daily service except Sunday). Bus stops are located on South Parade and Upper Park Road, which whilst not penetrating into the walled town, provide for easy pedestrian linkage to the primary shopping area.
- 4.104 Access by train is also reasonable, although in common with a large number of settlements, is physically separate from the main shopping area of the town and is located to the west of the central area on Lower Park Road. The walk between the railway station and the primary shopping area extends to some 500 metres along the sloping Lower Park Road and Park Road. The railway station provides local services which link Tenby to Saundersfoot and Narberth, while 2-hourly services connect the town to Pembroke Dock, Carmarthen, and the Swansea - Paddington mainline beyond.

Customer Views and Behaviour

- 4.105 Customer views were sought on Tenby in terms of people's likes, dislikes and the improvements they would like to see to encourage them to visit the centre more often. 46% of people most liked the fact that Tenby was near or convenient to their place of residence with 10% highlighting its coastal location as the centre's principal benefit. Other popular responses included the selection and choice of multiple and independent shops, and the attractive environment of the centre.
- 4.106 A large number of people (approximately 32%) stated that there was nothing that they disliked about Tenby town centre. However nearly 25% of respondents stated that a difficulty parking was their main dislike about the centre. Other popular choices in terms of people's dislikes were the selection and choice of multiple retail outlets and, some referred to the town's unattractive / unclean environment. A small majority of people also cited the fact that there was a limited choice of independent shops within the centre and that the recent shop closures / vacancies were having a detrimental effect on their perceptions of the centre.
- 4.107 An improved choice of both multiple and independent/specialist shops was identified as something that would persuade people to visit Tenby town centre more often. Alongside this, the provision of

more parking spaces was identified as a potential benefit, and this ranked equally with a new Marks & Spencer store for the centre, both of which received 11% of responses. 21% of people felt that there was nothing in particular that could be improved in Tenby that would make them visit it more often.

State of Town Centre Environmental Quality

- 4.108 Within the walled area of the town centre, the vast majority of properties are of a historic nature, with many being listed. They provide the centre with a distinctive architectural style and pattern, a fact which is translated into its status as a Conservation Area. The majority of properties appear to be in a relatively good state of repair, making a positive contribution to the town centre environment.
- 4.109 Outside of the walled area, there is a mix of buildings from different periods, representing the growth and change in the town in the post-war period. A number of these are vacant and / or are falling into disrepair. These generally detract from the overall environmental quality of the town centre and opportunities to enhance these properties and maintain other areas within the centre should be investigated. For example, the Historic Town Scheme previously implemented by PCNPA, provided funding to restore the historic fabric of individual properties. Other schemes have provided enhancements to public spaces in the town, including cobbling, tree planting, lighting and street furniture. These schemes have provided continued improvements to the town centre environment, especially in the historic core of the centre.
- 4.110 Development opportunities within the town centre appear to be limited. Aside from the site of the Royal Gatehouse Hotel, there is a vacant former garage forecourt site on South Parade which may provide an opportunity for new retail development, potentially for convenience goods. Opportunities for the development of large modern retail units with Tenby are, however, limited due to the town's historic context and fabric.

Conclusions

- 4.111 Overall, Tenby is a vibrant town centre within an attractive historic setting. Its retail offer is heavily biased towards the tourist trade, but it is clearly also performing its local role. As a 'tourism destination and local service centre' the town is clearly performing strongly. However, given that it outperforms some of the higher order centres within Pembrokeshire (centres which have been attributed more strategic roles), the town could have a role as the principal centre serving south-eastern Pembrokeshire, whilst still maintaining its function as a strong economic centre for tourism.

Pembroke Town Centre

- 4.112 The WSP Update, and PCC's LDP Background Paper on retail, state that Pembroke and Pembroke Dock are viewed as functioning together as the County's secondary retail and service centre (behind Haverfordwest) serving the south of the County. To fulfil this function, the two centres will need to ensure that their roles and characters are clearly defined, and complementary in nature.
- 4.113 Of the two centres, Pembroke has the potential to provide a niche market offer that capitalises on its historic character and heritage asset.
- 4.114 Like other historic centres in the County, the built fabric of the town reflects its historic development. Pembroke is the third largest centre in terms of retail unit numbers (having over 20% more units than Pembroke Dock), but is the fourth largest centre in floorspace terms (and around 800 sq.m. smaller than Pembroke Dock). The town also has a high proportion of units and floorspace devoted to service uses, with a significantly below average representation of comparison goods traders. This highlights the service and tourism role played by Pembroke in the retail hierarchy – a role which could be capitalised upon through an appropriate retail strategy.

Structure of the Town Centre

- 4.115 Pembroke town centre is dominated at its western end by Pembroke Castle. The remainder of the town centre takes a linear form and includes properties flanking both sides of Westgate Hill, Main Street, Northgate Street and East Back. The centre's topography falls away from Main Street to the north and south, with the town centre boundary including The Parade at a lower level to the south. This lower level street comprises predominantly car parking and service based uses including the Tourist Office, arts and crafts units, and food and drink. The defined town centre includes a large number of residential properties concentrated at its eastern end, at which point it has much less of a 'shopping' character.
- 4.116 The primary retail frontage commences at the western end of the town at the Westgate House Dental Practice. The primary frontage extends along both sides of Main Street, terminating with a dominant four storey townhouse (occupied by a firm of solicitors) which acts as a significant bookmark to the retail frontage at the commencement of the predominantly residential area at East Back. The frontage extends slightly further on the southern side of Main Street. Aside from residential properties, the eastern end of the town centre includes a number of non-A1 retail uses including dental practices, office space, galleries, churches, and food and drink establishments.

Retailer Representation

- 4.117 High street multiples are poorly represented in Pembroke. The town does not have any key high street comparison outlets with the only well-known retailers present being Somerfield, Spar and Lloyds Pharmacy. All the key financial institutions are present in the town - NatWest, Barclays, Lloyds and HSBC.

Pedestrian Flows

- 4.118 At the time of the survey, the town was relatively busy. The highest levels of pedestrian activity were observed within the primary retail frontage along Main Street, with the busiest area being in the general locality of the Somerfield store. Moving east through the town centre along Main Street flows diminished rapidly with relatively low numbers of pedestrians observed beyond the defined primary frontage.
- 4.119 The pedestrian demographic at the time of the survey suggested the town is equally well-used by both local people and tourists.

Accessibility

- 4.120 The town is linked to the A477 by the A4075 from the east and the A4139 to Pembroke Dock to the north. The A4139 runs south east along the coast to connect the town to Tenby. These highways link the town with the trunk road network and the rest of Pembrokeshire. The town is therefore relatively well-served by road, although very little of the network west of Carmarthen is dualled. The town has a plentiful supply of town centre parking, the majority of which has direct pedestrian links to the retail core. It also has an effective (and reasonable) pricing strategy which contributes to the overall attractiveness of the centre.
- 4.121 Pembroke is located on the Tenby – Haverfordwest FirstGroup bus route which runs an hourly service throughout the day, Monday to Saturday between approximately 7.30am and 9pm. The town is also served by a number of public bus services operated by Silcox Coaches which provide frequent services connecting the town to the local area, the rest of Pembrokeshire and Carmarthen (twice weekly service). The National Express service between Haverfordwest and Birmingham / London also runs through the town. As such, the town's accessibility by public transport is good.
- 4.122 The railway station in Pembroke is located outside the town centre to the east on Station Road. The station is on a branch of the West Wales Line with local services connecting the town to the rest of Pembrokeshire, and there is also a two-hourly service running between Pembroke Dock and Swansea, which links the town to the Swansea – Paddington mainline and the national rail network.

Customer Views and Behaviour

- 4.123 In terms the aspects of the town centre liked most by its users, the survey indicates that its convenience was the most favoured response (just under 40% of respondents chose this option). Other popular answers included the selection and the choice of independent shops in the town, its attractive environment, and the fact that it's perceived as a friendly place with a good community feel to it. Respondents also felt that easy parking, a pedestrian-friendly environment, and the compactness of the centre were all positive factors.
- 4.124 Just under 45% of respondents felt that there was nothing in particular that they disliked about Pembroke town centre. This is a positive response which is considered to highlight the centre's value amongst those who use it. The most popular dislikes with regard to Pembroke included its poor selection / choice of multiple shops (14% of respondents chose this option), a difficulty parking (10%) and an unattractive environment / dirty streets / litter (10% of respondents).
- 4.125 In terms of improvements that could be made to the range and quality of the facilities to encourage a greater level of usage from respondents, the most popular response was an improved choice of multiple retail outlets, with 20% of respondents giving this answer. A further 10% felt that the range of independent or specialist shops could be improved with another 10% suggesting that meeting places within the town should be improved. Importantly, over 30% of respondents felt that there were no particular improvements that could be made that would persuade them to visit the town centre more often. This is considered to indicate that they feel the town centre serves their needs.

State of Town Centre Environmental Quality

- 4.126 In terms of its overall appearance, Pembroke has a definitive historic character, dominated by the castle and the river, which are the town's key assets. However, the quality of the town centre environment is eroded somewhat by the number of buildings in a state of disrepair, currently undergoing work, or vacant.
- 4.127 The town's historic built form and fabric are one of its key attributes and should be capitalised upon. The centre offers an attractive, clean and pleasant shopping environment, with its built fabric adding interest to the street scene. As a shopping environment, vehicular traffic is quite high, however, which detracts from the centre's overall quality due to the obvious pedestrian / vehicle conflict.
- 4.128 There is a large amount of vacant upper floorspace within the town centre and a number of historic buildings in need of repair. The centre has a very mixed quality to it also, with a number of residential properties being present and many of these are of high amenity value and character. It is suggested that PCC should consider the implementation of a Townscape Heritage Initiative for Pembroke to assist in boosting its economic fortunes.

Conclusions

- 4.129 In overall terms, Pembroke appears to be functioning relatively well. The pedestrian activity on the day of the survey clearly indicated its tourist function but also its role as a local centre. The town centre itself has potential and does possess some buildings of a very high standard in terms of built fabric and quality. However, the town's role within the County needs to be defined (character / retail offer) and a retail strategy put in place to deliver this and ensure it truly functions as a complementary part of the Pembroke/Pembroke Dock secondary retail centre.
- 4.130 As set out above, the JUDP defines the town centre as covering a wide area with a range of uses. The emerging Pembrokeshire LDP could consider scaling back the extent of the defined town centre and the primary frontage, which would exclude the predominantly residential area at the eastern end of the town. The extent of the primary frontage should be carefully considered, however, as it may be appropriate to extend the western end to include the retail outlets on Westgate Hill up to the castle.
- 4.131 Based on the findings of the healthcheck, it is considered that Pembroke has the potential to function as a niche market town with a historical character. This will both contrast with and complement Pembroke Dock with its more traditional retail offer. The town already has a number of independent traders and a high proportion of service uses focussed on the tourist trade, which together with its heritage assets make it well positioned to take on this role.

Pembroke Dock Town Centre

- 4.132 As set out previously, Pembroke Dock is viewed as having a complementary role to Pembroke. In terms of its size, the town centre has approximately half of the retail units of Tenby and Haverfordwest, and fewer than Pembroke, Fishguard and Milford Haven. However, the presence of the Asda foodstore within the town centre boundary means that the town has the third largest retail floorspace offer in the County, behind Tenby and Haverfordwest.
- 4.133 The town has a comparison goods floorspace of less than half the national average, and it also has a below average offer for convenience goods, in terms of both units (significantly so) and floorspace. In floorspace terms, it is closer to the national average, and this is likely to be a direct reflection of the presence of a single large foodstore (Asda) within the town centre boundary. The town's service provision, whilst above the UK average, is however closer to the average than the majority of other towns within the County. This is considered an indication of the town's lack of tourist trade.
- 4.134 As a centre, Pembroke Dock ranks relatively highly within the County and its rank increased markedly between 2005 and 2007, with a smaller increase experienced in the two years since. Notwithstanding this, the town centre itself appears to be struggling as evidenced by the prominent vacant unit clusters on Dimond Street.

Structure of the Town Centre

- 4.135 The traditional core of the town centre is broadly cross shaped, albeit extended northwards to accommodate the Asda Store within its boundaries. The centre is based around Queen Street, Dimond Street, Meyrick Street, Harbour Way and Gordon Street, together with the St. Govan Shopping Precinct and the Asda foodstore located on Water Street/Western Way. The town's primary frontage is located along Queen Street and Dimond Street, although Queen Street has more of a secondary retail function. Other retail units were noted along Bush Street although these are not within the centre boundary.
- 4.136 The principal retail function of the town is clearly located on Dimond Street, with the offer becoming more secondary in character moving west into Queen Street. Aside from the primary frontage, further retail units are located in St Govan's Shopping Centre which provides one link between the primary frontage and the Asda store. A further more direct link is provided via Gordon Street. The Asda car park appears to serve as the principal car park for the town centre with the store being the key retail attractor.
- 4.137 Outside the town centre, there are a number of large retail units. These are located on Pier Road (edge-of-centre) and London Road (out-of-centre).

Retailer Representation

- 4.138 A number of national multiple retailers are represented in Pembroke Dock, but this representation is heavily biased towards the town's edge-of- and out-of-centre offer as opposed to the town centre itself. Within the town centre recognised high street multiples include Boots (Pharmacy), Clinton Cards, Lloyds Pharmacy, Shoe Zone, Specsavers and Asda. HSBC, Lloyds, Barclays and Britannia Building Society are also present in the town.
- 4.139 Aside from these, multiple retailer representation is particularly low within the centre. Outside the defined centre, however, Lidl and Wilkinson are present at Pier Road, and Tesco Extra at London Road is adjacent to a retail park which accommodates Argos, Peacocks, Brantano, Focus and Poundstretcher Extra. All these stores have ample car parking and are highly likely to represent a preferable shopping alternative / more attractive destination to the town centre. The presence of these retailers, in a retail park format, is considered likely to be the principal reason for the expenditure flow into Pembroke Dock from Pembroke.
- 4.140 In terms of commitments, planning permission has been granted for a mixed use scheme around the harbour in Pembroke Dock, known as Martello Quays. This development includes 3,000sq.m. of Class A1 retail floorspace. In addition, Asda has a certificate of lawfulness for the insertion of a 2,500sq.m. gross mezzanine floor within its existing retail unit and planning permission exists for circa 1,000sq.m. of new retail floorspace on London Road which we understand will be occupied by an Aldi discount foodstore.

Pedestrian Flows

4.141 At the time of the visit, it was evident that the town centre is relatively well used although the main focus for pedestrian circulation and activity was the Asda foodstore. There was a noticeable decline in pedestrian movement as you move away from the Asda store towards Dimond Street. Pembroke Dock has a far smaller (if any) tourist offer and this was evident in the pedestrian population at the time of the site visit.

Accessibility

4.142 Pembroke Dock is linked to Milford Haven, Haverfordwest and beyond to the north, and Carmarthen to the east by the A477. The A4139 runs south east to connect the town to Pembroke. The town is therefore relatively well-served by road, although very little of the network west of Carmarthen is dualled. Car parking within Pembroke Dock is ample but is predominantly provided by the free Asda car park. There is also a high level of on-street car parking provision within the defined town centre.

4.143 The town centre is well-served by a number of bus services running frequently to the local area, the rest of Pembrokeshire and Carmarthen (twice weekly service). The National Express service between Haverfordwest and Birmingham / London stops at Laws Street, and at the Tesco Extra on London Road.

4.144 The railway station in Pembroke Dock is relatively close to the defined town centre, being just to the east of Dimond Street. The station is on a branch of the West Wales Line with local services connecting the town to the rest of Pembrokeshire, and there is also a two-hourly service running between to Swansea, which links the town to the Swansea – Paddington mainline and the national rail network.

Customer Views and Behaviour

4.145 Respondents who use Pembroke Dock were asked what they most liked and disliked about the town centre, and what improvements they would like to see that they thought would make them visit the centre more often. Approximately 43% of those that use the town centre stated that they most liked the centre's convenience to them. Just under 20% felt that the selection and choice of multiple shops was what they most liked about the centre, with a further 10% referring to the ease of parking as a major positive. It should be noted that it is not possible to define what the respondents viewed as the town centre, so the responses may relate to the out-of-town provision as much as the defined centre itself.

4.146 When asked what they disliked about the centre, 35% of respondents were unable to identify any particular element. Of the remainder, popular dislikes included poor selection or choice of multiple

retail outlets (22% of respondents), poor selection or choice of independent shops (13%), an unattractive environment (11%), and vacant shops (12%).

- 4.147 As for the improvements to the town centre that could persuade people to visit more often, the most frequent answer (with 25% of the responses) was an improved choice of multiple retail outlets. This was closely followed by 13% of respondents asking for an improved range of independent or specialist shops within the town centre. Thirty percent of respondents did state that there was nothing that could be done to the town centre to make them visit it more often.

State of Town Centre Environmental Quality

- 4.148 The town centre falls within a conservation area designation which encompasses much of the town's built-up area. This area is also subject to a Townscape Heritage Initiative which provides grant assistance to owners for the reinstatement and repair of historic properties. Within the town centre, particularly around the junction of Meyrick Street and Queen Street a number of buildings appear to have recently undergone refurbishment works.
- 4.149 The built fabric of the town centre, save for a small number of recently refurbished buildings, is generally poor in terms of appearance. The prominence of the vacant units (particularly Woolworths and Spar) only serves to add to the feel of the town as a retail area in decline. This situation is exacerbated by the links between Dimond Street and the St. Govan Shopping Centre, and the quality of the St. Govan centre itself.
- 4.150 The St. Govan Shopping Centre is a single storey building of red brick construction which adds nothing to the overall quality and attractiveness of the town centre, particularly when the windows in its Meyrick Street elevation are covered by security shutters during trading hours. Internally, the centre is dimly lit and has a low-end retail offer dominated by charity shops and vacant units. Given its position between the town centre and Asda (and the Martello Quays site), the St Govan centre does present a significant redevelopment opportunity for the town.

Conclusions

- 4.151 Pembroke Dock town centre is clearly struggling. This is no doubt compounded by the range and scale of out of centre retail in the local area. This includes outlets such as Wilkinsons, Brantano, Peacocks and Argos all within relatively close proximity to the town centre.
- 4.152 Whilst the Asda store in the town centre appears to be performing well, the town centre itself looks tired and run down. It is in need of investment to improve both the physical infrastructure and its retail offer. If Pembroke Dock is to complement the niche market offer of Pembroke with a more conventional retail-focused town centre function, then the quality of its environment needs to be improved.

- 4.153 The out of centre offer in Pembroke Dock is a concern. It is suggested that rather than try to compete with this offer, the town centre should look to integrate the out of town function within its existing function and purpose. The potential for enhanced pedestrian linkage⁴ along King William Street between the Asda Store car park and Tesco Extra should be explored. The town centre should recognise the draw that these multiple retailers offer and use this to its advantage to try to enhance pedestrian activity, movement, and general spend within the core of the town centre itself.

Milford Haven Town Centre

- 4.154 Milford Haven, together with Neyland is identified in the WSP Update as a Tier 1 settlement in The Pembrokeshire Haven area, i.e. a settlement with a strategic role. The WSP Update does however recognise that the town is struggling and much of its built fabric will need to be upgraded. The town clearly has a role as an economic centre in Pembrokeshire due to its shipping function, but its retail function is in need of regeneration.
- 4.155 The town centre data available suggests the town is struggling. VenueScore ranks the Haven's Head retail park above the town centre itself (which in 2009 did not score highly enough to be included in the rankings). It is the fifth largest centre in the wider Pembrokeshire County area, but has a vacant floorspace proportion of almost three times the national average, much of which can be attributed to the vacant Woolworths and former Kwik Save stores within the town centre boundary.
- 4.156 The Council commissioned Barton Wilmore to prepare a Vision and Framework to guide the targeted investment and development to regenerate Milford Haven town centre. The strategy has identified a number of regeneration objectives for the town centre including the enhancement of the built fabric and environment of the town centre and the creation of improved links between Charles Street, Hamilton Terrace and the Marina.

Structure of the Town Centre

- 4.157 The town centre has a broadly rectangular shape based on the 'block' street pattern of the town. It is located in an elevated position to the north east of the harbour and docks area. The town centre as defined by the JUDP extends across a wide area encompassing a significant proportion of non-retail uses. It is proposed that this boundary will be reduced in the emerging LDP to more closely reflect the town's retail core.
- 4.158 The primary frontage for Milford Haven is located along Charles Street in three blocks between the junction with Francis Street in the east to the junction with Dartmouth Street in the west.

⁴ The existing route lacks adequate signage and is poorly surfaced.

4.159 The town centre extends across a larger area than this including the parallel streets of Robert Street, Charles Street and Hamilton Terrace running east - west and Dartmouth Street, Priory Street, Fluke Street, Barlow Street and Francis Street running north – south. The areas of the town centre fronting Victoria Road and Hamilton Terrace fall within a conservation area designation.

Retailer Representation

4.160 Relative to the national average, Milford Haven has a poor comparison offer, limited convenience retail and an oversupply of service uses. This is reflected in the representation of multiples within the centre.

4.161 The town's retail offer is limited, predominantly consisting of charity shops and lower end retail operators such as Shoe Zone. There are a number of service uses throughout the town centre, including hairdressers, betting shops, estate agents, computer repairs, etc. There is a Co-op Pharmacy and a relatively large Spar convenience store which would serve local top-up shopping needs.

4.162 Milford Haven is well represented by the financial institutions with HSBC, Barclays, NatWest and Lloyds all being situated along Hamilton Terrace.

4.163 The Haven's Head Retail Park clearly offers an alternative comparison shopping provision to that provided within the town centre. This retail park includes Tesco, Boots, Peacocks, QS, Littlewoods Clearance and Poundstretcher. Planning permission exists to extend the Tesco store to provide additional retail sales floorspace for both convenience and comparison goods.

Pedestrian Flows

4.164 At the time of the survey, the centre was moderately busy with a number of cars parked within the on-street bays. In comparison, however, the Haven's Head retail park appeared to be considerably busier.

Accessibility

4.165 The town is well-served by public transport. It is served by a number of bus routes providing frequent services between the town and the local area, Pembroke Dock, and Haverfordwest. There are however no services running directly from Milford Haven to the wider region and beyond.

4.166 The town is accessed from the north via the A4076 from Haverfordwest and the A477 from Pembroke Dock to the south. There is a high level of on-street parking within the town centre, along with two surface level car parks at Robert Street and Manchester Square.

- 4.167 Train services connect the town with Carmarthen and the national network beyond. The train service runs once an hour during peak period Monday to Saturday, and every two hours off-peak. Limited services are also available on Sundays.

Customer Views and Behaviour

- 4.168 For Milford Haven, over 50% of respondents using the town centre stated that they liked the fact that the centre was convenient for them. This suggests that Milford Haven has an established role as a centre serving the local community. Just under 10% of the respondents said there was nothing that they liked about the town, and around 14% stated that they liked the centre's familiarity as they lived or were born there. Significantly, everything that respondents liked about Milford Haven related to factors such as familiarity, environment, or friends / relatives living there. None of the respondents referred to its retail offer as something they particularly liked about the town.
- 4.169 In terms of people's dislikes with regard to Milford Haven, the poor selection or choice of multiple retail outlets was a frequent response, with approximately 47% of respondents giving this answer. The next most frequent (at 12%) related to a poor selection or choice of independent shops within the centre. 30% of people did however state that there was nothing they disliked about the town centre.
- 4.170 In terms of the improvements that respondents would like to see to the quality and range of facilities in Milford Haven to persuade them to visit more often, there was a clear preference for an improvement of the retail offer. In terms of the responses given, just under 50% sought an improved choice of multiple retail outlets, over 20% wanted to see an improved range of independent/specialist shops, around 16% felt that the town should attract larger retailers while 12% felt that the existing shopping facilities should be refurbished or improved. Clearly from the responses given it is the offer of the town centre which is seen as its principal negative aspect.

State of Town Centre Environmental Quality

- 4.171 The quality of the majority of the town centre environment is poor, with the built fabric of the primary frontage looking dated and tired. The only buildings of any real quality are located along Hamilton Terrace and many appear to have been recently restored and / or refurbished.
- 4.172 A number of the buildings within the centre appear to be of 1960s / 1970s construction, are of little architectural merit, and are considered to detract from the overall appearance and quality of the primary frontage. Furthermore, the town centre's built fabric does not appear to have been well-maintained with a number of properties being in need of repair or redecoration / maintenance work. In light of the state of the town centre environment, a number of opportunities for redevelopment

are evident which could improve the centre's overall appearance. These include the building on the corner of Charles Street (northern side) and Fluke Street, and the Bingo Hall on Charles Street (southern side).

- 4.173 The pedestrian environment is generally good along Charles Street. The pavements are wide in places, surfaces are generally in good condition, and there are a number of benches provided.
- 4.174 Overall, however, the town centre appears tired and in need of investment and renewal. In this light, the regeneration strategy commissioned by PCC is clearly needed.

Conclusions

- 4.175 In overall terms, Milford Haven has a similar feel and character to it as Pembroke Dock in terms of both its environmental quality and its retail offer. The retail offer at Milford Haven is however of a lower quality than that at Pembroke Dock. The number of multiple retailers represented is low and there are prominent vacancies within the town centre. This situation is not helped by the dated / run-down appearance of some prominent buildings along the primary frontage. If the town is to be improved, then a strategy for renewal and targeted redevelopment is required.

Fishguard Town Centre

- 4.176 Fishguard occupies a position as the key retail and service centre serving North Pembrokeshire. It is the largest settlement in the north of the County and is often considered in combination with the neighbouring town of Goodwick which is described later in this statement.
- 4.177 Fishguard, together with Goodwick, has been identified in the WSP Update as one of the key drivers for the regeneration of North Pembrokeshire. Fishguard has a greater number of A Class units than Milford Haven and Pembroke Dock, and when combined with Goodwick has a similar amount of 'A' use class floorspace as Milford Haven. Fishguard clearly has an important role in the future regeneration of North Pembrokeshire in its own right - Goodwick is considered to add little to the overall offer of Fishguard aside from the economic benefits of the harbour.

Structure of the Town Centre & Retailer Representation

- 4.178 The defined town centre is relatively linear in shape following the axis of West Street (A40) and Main Street (A487). The centre extends southwards from this axis to include a short section of High Street (A40), the town centre's principal car park off West Street, the existing Somerfield store and Fishguard Junior School. The majority of this area falls outside the conservation area boundary, with the site of the Junior School being subject to an outline planning permission for a foodstore redevelopment (up to 1500sq.m. gross). The existing town centre boundary could be more tightly defined in the emerging LDP to exclude the western extent of Main Street and the

properties and car park on Hamilton Street. This would create an entirely appropriate focus on the main shopping area within the town.

- 4.179 The primary frontage of the town is made up of West Street, The Square, and High Street.
- 4.180 Fishguard's retail offer appears to be a mix of multiples and independent / niche traders. The multiple retailers represented include Boots and Peacocks, along with some lower order retailers such as Seconds Ahead. Four of the major financial institutions are present - Halifax, Lloyds TSB, Barclays and HSBC. In terms of its convenience goods offer, Fishguard has a Somerfield store and a CK's Supermarket these are situated at opposite ends of the defined town centre. Both stores have a relatively limited range of goods and appear to predominantly serve local / top-up shopping needs.
- 4.181 The site of the Junior School and its surrounding commercial buildings represents a key retail opportunity within Fishguard to develop a new foodstore. Fishguard has a convenience offer marginally below the national average, but that offer could be enhanced through a greater range of choice of provision through the development of an additional foodstore. The site is however setback from the primary frontage and access will be a key consideration when reserved matters proposals come forward.

Pedestrian Flows

- 4.182 The site visit was undertaken mid-morning on a weekday during September 2009 and at that time the town centre car parks were full and there was a high number of pedestrians using the town centre and its facilities. The narrow pavements within the town (which are a characteristic of its historic development) do create difficulties for pedestrians in places.

Accessibility

- 4.183 Road access to Fishguard is good. It is connected via the B4313 south to Narberth, the A40 to Haverfordwest, and the A487 west to Goodwick / St Davids and east to Newport and Cardigan. Fishguard benefits from a relatively good supply of centre car parking. The Somerfield store has its own car park which is limited to a 2-hour stay.
- 4.184 Fishguard is served by a number of bus routes linking the town with St. Davids, Haverfordwest, and Cardigan with the principal service running hourly during the day in the week between Haverfordwest, Fishguard and Cardigan. The town is also served by a coastal shuttle service running between Fishguard, St Davids and Newport. This service runs 3 times a day during the summer (May to September) and twice a day on Mondays, Thursdays and Saturdays in the winter (September to May). The town is also served by the 'Poppit Rocket' service which runs three times a day (7 days a week) between Fishguard and Cardigan in the summer (May to September).

- 4.185 The ferry terminal in Fishguard Harbour (at Goodwick) is served by a twice daily train service which runs from Swansea and terminates at the port to coincide with the arrival of the Rosslare ferry. The service does not, however, run to Fishguard town.

Customer Views and Behaviour

- 4.186 The household survey identified convenience as the factor that respondents liked most about using Fishguard town centre - 45% of people selected this. The most frequently given answers all related to the environment and ambience of Fishguard as a town centre - 7% of people most liked its safety, 14% of people stated most liked its friendliness, just under 10% of people stated it had a pleasant ambience or atmosphere, and 7% liked the fact that it was a quiet town. These responses suggest that people's perceptions of the quality and character of the town are more important than its retail offer or facilities.
- 4.187 Those same respondents were also asked what they most disliked about the town centre and close to 40% of them said there was nothing. However a deficiency in the selection and choice of shops was evident in the responses for both multiple retail and independent outlets, indicating an area where people feel the town could be improved. This was confirmed through the response to the next question in the survey which sought to identify what improvements to the town centre would make people visit it more often. In response to this question, close to 24% of respondents felt that an improved choice of multiple retail outlets would encourage them to visit the town more often, with a further 21% stating that an improved range of independent or specialist shops would have the same effect.
- 4.188 The above responses clearly identify Fishguard as a town with an attractive and pleasant environment that is held in high regard by those that use it; however there is clearly an aspiration within the local community to see the offer, choice and quality of the retail facilities within the town centre improved.

State of Town Centre Environmental Quality

- 4.189 The built environment of Fishguard is in a generally good condition, although a small number of prominent vacant buildings, notably the Farmers Arms and Pinocchio's on The Square, are detracting from this. The majority of the town centre is within the designated Conservation Area, and in terms of its overall environmental quality, the town centre has an attractive and pleasant character. Additionally, certain aspects of the town centre are beginning to look tired which can reduce the town's overall value in amenity and character terms, however this could be rectified through improved maintenance regimes.
- 4.190 The historic street pattern provides an interesting town centre environment and a number of high quality buildings are evident throughout the town, particularly along the western end of the primary

frontage at West Street, and the primary frontage on High Street. The quality of the streetscene is damaged in certain places by inappropriate shop fronts, most notably the Peacocks unit on High Street.

- 4.191 Vacancy rates in Fishguard are above the national average, and this is evident within the town centre where a number of prominent buildings are vacant. This includes the fish shop on High Street, The Farmers Arms and Pinocchio's. Re-use of these buildings would make a noticeable difference to the clarity and quality of that area of the town.

Conclusions

- 4.192 Fishguard is the principal centre serving North Pembrokeshire. It is clear from adopted and emerging planning policy that this situation is expected to continue. The town has an opportunity to grow based on its proximity to the Harbour and the tourist trade this can deliver. If tourists are to be encouraged to visit the town from the Harbour, however, the connections between the two need to be enhanced. The town centre has an attractive shopping environment with a predominance of independent traders and service uses. Its comparison goods offer is limited, however, and this should be enhanced. The addition of a further foodstore within the town centre may provide the impetus for other new retail representation.
- 4.193 At the current time, the town appears to be relatively vibrant, although the high level and prominence of vacancies provides an indication that early stages of decline may be setting in. The town has a similar character to a number of other historic centres within Pembrokeshire, and this asset should be capitalised upon. This provides the town with the potential to build on the history of its fabric by maintaining its overall appearance at a high level, and supplementing this with a niche market offer (possibly arts and crafts based) that would serve both local and the tourist trade.

Narberth Town Centre

- 4.194 Narberth is the smallest of the principal town centres identified by PCC's retail background paper to its LDP and is classified by the JUDP as a small to medium retail centre. It is roughly half the size of Pembroke, but has the highest level of comparison unit representation in Pembrokeshire, and it comes second only to Haverfordwest in terms of its proportion of comparison floorspace. Along with St David's and Kilgetty, it also benefits from the lowest vacancy rates in the County. The town has a very important tourist function which is highlighted by a high proportion of its floorspace being service uses. Aside from these, the town is broadly in line with the national averages in all other respects. Importantly, all the indicators of performance suggest Narberth is a strong, vibrant centre.

- 4.195 Within the Wales Spatial Plan 2008 Update, Narberth is identified as a medium sized centre with a niche retail offer. The Plan identifies it as a good example of a rural centre which is regenerating its local areas.

Structure of the Town Centre & Retailer Representation

- 4.196 Narberth town centre takes a linear form with its main parade of shops and its primary frontage focused on High Street. The designated town centre area extends from the car park at the northern end of High Street and extends southwards to Market Square. The defined town centre area also includes the beginnings of St James Street and Spring Gardens, and Water Street. The vast majority of the town centre is included within the designated Narberth Conservation Area.
- 4.197 The current town centre has a wide variety of shops ranging from convenience stores including Costcutter and Spar to a range of independent fashion, arts, crafts, and homewares retailers, and a number of tourist related shops. The southern end of the centre has a concentration of service uses including financial institutions, solicitors, banks, and art and craft based galleries and stores. The northern end of the town centre comprises more traditional retail stores, both convenience and specialist comparison. The retail offer in Narberth is typified by independent niche traders with a product range that is specialist and locally based.

Pedestrian Flows

- 4.198 In terms of pedestrian movements, Narberth was busy at the time of the site visit (10.30am on a Monday morning). All of the on-street car parking spaces were occupied within the town centre and high levels of pedestrian activity were observed.

Accessibility

- 4.199 Narberth is located off the trunk road network in Pembrokeshire. It connects to the A40 via the B4314/4313 and the A478. The A478 runs north-south through the town linking the A40 in the north and the A477 in the south. Car parking is provided throughout the town in on-street bays, along with a surface level car park at the north end of High Street.
- 4.200 The town is located on the main bus route between Haverfordwest and Carmarthen with a service running approximately every 3 hours. The town's railway station is located outside the defined town centre and is a 'request stop' on the West Wales branch line which connects the town to Pembroke Dock, Carmarthen and beyond.

Customer Views and Behaviour

- 4.201 The market survey sought to identify what in particular those using the Narberth town centre liked and disliked about the centre, and whether there were any improvements that could be made that would encourage them to use the centre more often.
- 4.202 Just shy of 50% of the respondents who use the town centre felt that the selection and choice of independent shops was what they most liked about it. This highlights the importance of Narberth's offer and its role as an independent niche retail destination. In contrast with the other centres, convenience did not rank highly, although 20% of respondents did give this answer. 28% of respondents also felt that the selection or choice of multiple retail outlets in Narberth is what they most liked about the centre, with a further 10% stating that it's friendly place and its community atmosphere was a major positive for them. The remaining responses were fairly evenly split and included the character and individuality of the centre as an old style town centre, its attractive environment and its competitive prices.
- 4.203 In terms of people's dislikes with regard to Narberth town centre, 45% of respondents said there was nothing they disliked about the centre. The next most frequent response (38%) was a dislike of the parking difficulties within the town centre. Traffic congestion was also identified as a major dislike of some respondents.
- 4.204 Positively, approximately 43% of people felt that there was nothing that could be improved within Narberth that would persuade them to visit it more often. This is considered the town centre's current strength. Reflecting those aspects of the town centre that people disliked, 23% of people suggested that more parking spaces would persuade them to visit more often, and a further 8.5% suggested that if the road congestion was reduced they would use the town centre more often. In light of the above it is clear that Narberth is viewed positively by those people who use it as a destination for niche independent retail, and this is clearly one of its strengths.

State of Town Centre Environmental Quality

- 4.205 In terms of its overall environmental quality, Narberth has an interesting character based around its historic built fabric and streetscene. The town centre is clean and the properties are in good condition and well-maintained. The primary retail area provides a pleasant environment in which to shop and the town is clearly vibrant and well suited to the niche market position it occupies.

Conclusions

- 4.206 Pembrokeshire County Council's retail evidence paper for the LDP concludes that Narberth is currently a strong centre with a niche retail shopping offer. The survey work undertaken for this study corroborates that fact.
- 4.207 The LDP should aim to consolidate this position and maintain the town centre as the most appropriate location for retailing whilst protecting the distinctive nature of the centre.

Newport Town Centre

- 4.208 Newport lies in the northern part of Pembrokeshire to the east of Fishguard. It is a relatively small local centre performing a tourist and local function. It lies within the Pembrokeshire Coast National Park Authority administrative area and a recent survey undertaken by the Authority found that it had several high quality small food shops, cafes and other facilities to make an attractive, historic centre. It's also been identified that the centre is well supported by local residents having no readily accessible competing centre in the local vicinity.
- 4.209 Within the adopted JUDP, there is no defined town centre or primary retail frontage. The entire town centre does however fall within a Conservation Area. In the emerging LDP, Newport is identified as a District Centre and a defined district centre boundary has been defined which broadly corresponds with the description of the town centre given below.

Structure of the Town Centre & Retailer Representation

- 4.210 The town centre in Newport (as defined by PCNPA), is broadly cross-shaped and is centred on the junction of Bridge Street, East Street, Long Street and Market Street. The majority of commercial uses are clustered around this crossroads with the largest frontage being along Market Street (in a north-south direction) and East Street (in an east-west direction).
- 4.211 In 2006, the PCNPA Retail Study identified Newport town centre as having a total of 33 units. Of these, 5 were convenience stores, 8 were comparison stores, 12 were service stores and 4 were vacant. Given the size of the centre the vacancy rate is relatively high being 14% of the total 'A' use class units within the centre. There are 29 total 'A' use class units with the remainder being one hotel and guest house, two sui generis uses and one non-residential institution. There are a high proportion of restaurants, cafes and public houses within the centre and a mix of other service uses including banks and a Post Office. In terms of comparison stores, the highest proportion is occupied by gift shops followed by Chemist/Opticians/Drug Stores. Within the town centre there are 3 newsagents/tobacconists/convenience units and two butchers stores.

Pedestrian Flows

- 4.212 In terms of activity, Newport appeared to be a fairly vibrant centre. Tables outside the restaurants and cafes on the pavement were busy and the town appeared to be performing well. Pedestrian activity levels were reasonably high, and there was clearly a tourist and local population present.

Accessibility

- 4.213 Newport is located on the A487 which links Fishguard and Cardigan. The town's main car park is located off Market Street.
- 4.214 The town benefits from an hourly bus service during the week on the Haverfordwest, Fishguard and Cardigan service route. During the summer months (May to September), the coastal shuttle service running between Fishguard and St Davids extends to Newport. However, there is only one outward and one return service per day. The town is also served by the 'Poppit Rocket' service which runs between Fishguard and Cardigan in the summer (May to September), and Newport and Cardigan during the winter (September to May). The summer service runs three times a day (7 days a week) and the winter service runs three times a day (Mondays, Thursdays and Saturdays).

Customer Views and Behaviour

- 4.215 Of those respondents who use Newport for their shopping trips, 44% most liked the fact that it was near or convenient for them. Others felt that it was a friendly place with a good sense of community and this was what 33% of respondents most liked about the centre. In terms of what the remaining respondents most liked, there was a fairly even split across a range of factors including its proximity to friends or relatives, a good selection and choice of multiple shops, an attractive environment and a pleasant ambience / atmosphere. There were limited things that people disliked about the centre, however frequent responses included the fact that it was too busy, there was too much traffic congestion, it was difficult to park, and there was a poor selection of shopping facilities.
- 4.216 As for any improvements that could be made to encourage people to visit the centre more often, there was no particular response that scored highly with a fairly even split of answers being found across improvements to the shopping facilities, an enhanced range of health and fitness facilities, better play areas for children, improved signage, more taxis and more parking spaces.

State of Town Centre Environmental Quality

- 4.217 The centre is characterised by its historic built fabric, which includes a high proportion of stone-built buildings. Generally, the buildings within the centre are in a good state of repair and appear well-maintained. This contributes greatly to the character of the town as a small historic centre serving its local area.

- 4.218 As with a number of centres in Pembrokeshire, Newport's historic street pattern has resulted in a number of very narrow sections of pavement which would be unusable for people with pushchairs or limited mobility.

Conclusions

- 4.219 Overall, Newport is an attractive and small town centre catering entirely for local and tourism needs. The convenience offer is characterised by local independent traders, and it appears to be performing well.

St David's Town Centre

- 4.220 St David's is based in the far north west of the administrative area of Pembrokeshire. It is the world's smallest city having its own Cathedral which provides the city with its principal attraction. In light of this, St David's primary function is as a tourist destination. In addition, there is a growing gallery culture within the town.
- 4.221 As a popular destination for visitors, the city supports a range of cafes, pubs and restaurants. It also serves as a district centre (and is classified accordingly in the retail background paper to the emerging LDP) with a limited retail offer for the residents of St David's and nearby rural areas. Its convenience offer is based around a CK's supermarket on New Street which provides the predominant convenience local shopping facility. The city has the lowest vacancy rates in Pembrokeshire and is clearly performing well in its current role.
- 4.222 The Wales Spatial Plan identifies St David's as a tier 3 settlement and identifies the future role of the centre as a local centre and an important tourism centre.

Structure of the Town Centre & Retailer Representation

- 4.223 The city centre is structured in an 'L' shape comprising Main Street (running north-south), Cross Square, and High Street (running east-west). Main Street has a mixed use character with a high proportion of residential uses, interspersed with retail and service units. The main shopping and service area of the town is situated on Cross Square and High Street. Beyond this on New Street, in a relatively isolated position relative to the principal shopping area, sits a foodstore (CK's supermarket) which provides almost 85% of the city's total convenience offer at an area of 1,381sq.m.
- 4.224 Within the JUDP for Pembrokeshire there is no defined town centre or primary retail frontage within St David's. The main commercial area of the town would however fall within the designated St

David's Conservation Area. The emerging LDP, however, identifies St David's as a district shopping centre and defines a retail centre boundary which runs from Cross Square along Main Street to the north and High Street to the east.

- 4.225 The Cathedral is located to the west of the main shopping area of the city.
- 4.226 The retail offer of St Davids is broadly in line with the national average in terms of unit numbers, but with an over-representation of service uses. In floorspace terms, the city is under-represented in comparison floorspace and significantly over-represented in service floorspace. There are no high street multiples present in the city with the exception of the Co-op Pharmacy, and the financial institutions of Lloyds TSB, HSBC, and Barclays. St David's offer reflects its role as a tourist centre with a high level of gift shops, gallery/antique outlets, and A3 uses.

Pedestrian Flows

- 4.227 Pedestrian activity was high throughout the city centre at the time of the survey. The city appears vibrant and thriving on its tourism function.

Accessibility

- 4.228 Road access to St David's is provided via the A487 which links the town with Fishguard and Goodwick to the east and Haverfordwest to the south.
- 4.229 St Davids is well-served by public transport. It is located on a number of bus routes which connect the town to Fishguard and Haverfordwest. Services run to both towns 7 days a week, hourly Monday to Saturday, with a 2-hourly service to Haverfordwest on Sundays. There is also a Super Low Floor bus service to Haverfordwest running hourly Monday to Saturday. During the summer months (April - September) the Celtic Coaster runs a half hourly service throughout the St. Davids Peninsula and the town is also served by the coastal shuttle service running between Fishguard, St Davids and Newport. This service runs 3 times a day during the summer (May to September) and twice a day on Mondays, Thursdays and Saturdays in the winter (September to May).

Customer Views and Behaviour

- 4.230 The response to this section of the household survey for St Davids was too small for any meaningful interpretation.

State of Town Centre Environmental Quality

- 4.231 The majority of buildings within the centre are in good condition and a good state of repair, and the historic street pattern and built fabric create an attractive and interesting retail centre environment.

On High Street, there is evidence of recent refurbishment work to a complex of retail units and holiday apartments.

Conclusions

4.232 In overall terms, as would be expected for St David's given its important tourism role, it is a very pleasant centre with its own historic character. Clearly this is a function that can be maintained as the city continues to contribute in this way to the economy of North Pembrokeshire. The town's strength as a tourist destination based on its heritage asset, together with its gallery culture and local independent trading character provide a strong basis for the centre's future prosperity.

Saundersfoot Town Centre

4.233 Saundersfoot is one of the smallest towns within the Pembrokeshire Coast National Park. It is a seaside resort with a retail offer firmly focussed on tourist trade. It remains as a secondary centre to Tenby (within the National Park area) in terms of its resident population and overall shopping facilities. The WSP Update identifies Saundersfoot as a tier 3 settlement having a future role as a local centre and an important tourism location and centre.

4.234 The dominant land use allocation within Saundersfoot is the harbour area as identified within the adopted JUDP. There is no defined town centre or primary retail frontage in the JUDP, which could result in the retail function of the centre being eroded over time as non-retail uses seek accommodation within the town.

4.235 The PCNPA LDP Retail Paper identifies Saundersfoot as a district centre as it contains a group of shops usually containing at least one food supermarket and non retail services such as banks, building societies and restaurants. This has been taken forward into the LDP as a district shopping centre designation.

Structure of the Town Centre & Retailer Representation

4.236 The town centre in Saundersfoot is focused around the seafront, harbour, and associated car parks. The retail offer and the primary retail frontage within the town wrap around this car park, running along The Strand into High Street and Cambrian Place, and then onto Brewery Terrace and Milford Street. The majority of this area falls within the designated conservation area.

4.237 The town centre is broadly in line with the national average for comparison, convenience and service unit numbers. In floorspace terms, however, it falls below national average for comparison and convenience (significantly so) and has an over-representation of service provision. This is likely attributable to the high number of public houses and restaurants (which are larger than typical A1 retail units) making up the service floorspace. High numbers of small shops will also produce

the comparison and convenience profile seen at Saundersfoot. Residential properties within the core shopping area are limited, and the town benefits from a low number of vacant units (although vacant floorspace is above the national average indicating that the vacancies include large units). The vacant units within the centre are, however, mostly located on the secondary retail areas and as such do not dominate the centre.

- 4.238 The town's convenience offer is based around a number of independent retailers including a bakers, butchers, off licence, newsagents and sweet shops. It also has a Spar store for local 'top-up' shopping needs.
- 4.239 In terms of comparison stores, the offer is around 15% below average in floorspace terms, and is 'low-end' ranging from footwear and clothing to DIY, hardware, and charity shops. The dominant comparison outlet within Saundersfoot (which is expected given its tourism function) is gift shops. In terms of service uses, it also has a high number of A3 uses particularly within the restaurant, café, public house sector. Again, this is entirely reflective of its role as a tourism centre within Pembrokeshire.
- 4.240 There are no high street comparison retailers present in the town centre. The only store which could be classed as a multiple is Richleys which sells 'factory seconds' and is not typically found on the high street. There are no financial institutions represented in the town. HSBC closed its branch in April 2009, and is now represented by a multi-function ATM close to the seafront car park.

Pedestrian Flows

- 4.241 The town centre was busy at the time of the site visit despite unfavourable weather conditions. As such, it can be assumed that the centre is generally busy during the tourist season.

Accessibility

- 4.242 The town is situated on the B4316 which connects the town to the A478 to Tenby in the west and the A477 to the north-east. The town is therefore located off the principal highway network within Pembrokeshire. Car parking within the centre is provided off Milford Street and at the seafront off Cambrian Place. The seafront car park is significantly more expensive than car parks in other Pembrokeshire towns.
- 4.243 Saundersfoot is served by 9 bus routes which predominantly connect the town with its surrounding area (Tenby, Amroth, Kilgetty and Pendine). Services are most frequent to Tenby and Kilgetty (hourly Monday to Saturday). A Sunday service to Tenby is also available, but only during the summer months. In terms of the wider region, there is an hourly service between Haverfordwest and Tenby (Monday to Saturday with one trip on Sunday), and a single service (Wednesday and Friday) between Pembroke Dock and Carmarthen.

- 4.244 The railway station is located outside the town and is a 'request stop' on the West Wales branch line which connects the town to Pembroke Dock, Carmarthen and beyond.

Customer Views and Behaviour

- 4.245 The survey identified a range of customer views on Saundersfoot. 33% of people using the centre most liked the fact that it was convenient for them or their nearest centre. Other frequent responses included its selection and choice of multiple retail outlets, its attractive environment and the fact that it was a friendly place. A number of people also cited familiarity as what they liked most about the centre.
- 4.246 In terms of what people most disliked about the centre, the most frequent responses were its selection and choice of independent shops and that it is sometimes a difficult place to park. People did however feel that if a larger supermarket was introduced to Saundersfoot this would persuade them to visit the centre more often, together with a greater range of multiple stores and the refurbishment / improvement of the existing shopping facilities. More parking was also identified as a potential improvement, as was more pedestrianisation.

State of Town Centre Environmental Quality

- 4.247 In terms of its environmental quality, Saundersfoot is a pleasant seaside resort town serving a local service and tourism function. The quality of its built environment and its general levels of cleanliness are reflective of this function and the need to preserve these elements of its character in order to maintain its status as a tourist destination. The built fabric of the centre reflects its history as a seaside town, although its quality is diminished by a number of poor quality developments (potentially from the 1960s / 1970s) which create inappropriate intrusions into the streetscene.

Conclusions

- 4.248 Overall, Saundersfoot is an attractive and pleasant retail centre. The offer of the centre is based heavily around the tourist trade, but it also has a local top-up shopping function in addition to this. The PCNPA Deposit LDP designates Saundersfoot as a 'local centre' and seeks to protect and enhance its district centre function, and encourage housing and employment opportunities to meet the area's needs without any detrimental impact on its special qualities and character. Saundersfoot has a clearly defined role and the emerging PCNPA LDP should see that this continues. The identification of primary retail frontage to maintain and protect the A1 use could assist in this regard. The retail offer within Saundersfoot is fairly low end, but this does not diminish its character as a relatively vibrant tourist centre within south Pembrokeshire.

Kilgetty Town Centre

- 4.249 Kilgetty (along with Goodwick) is the smallest centre in Pembrokeshire. Unlike Goodwick, however, Kilgetty has a definitive role as a local convenience centre due to the presence of the Co-op foodstore. Accordingly, the emerging LDP classifies the town as a Local Retail Centre. It is identified in the WSP Update as one of a number of smaller settlements which contribute to the overall attractiveness of an area as a key place to live, work and visit.
- 4.250 The town centre has no defined boundary in the adopted JUDP, but is subject to an allocation (under Policy 34) for the redevelopment of approximately 3 hectares of land for a quality foodstore. This allocation is based on Kilgetty's accessibility and ability to serve the food shopping needs of a number of settlements within south-east Pembrokeshire. The site allocated includes the existing Co-op store and car park, along with a number of other commercial units (and car parking area) to the west. The site was considered to be the most sequentially preferable to accommodate the quantitative need for a further 2450sq.m. (net) of convenience floorspace over the plan period. Despite this allocation, the site has yet to come forward for redevelopment.

Structure of the Town Centre & Retailer Representation

- 4.251 Kilgetty has a total of 19 commercial units including a post office, the Co-op foodstore, a pharmacy, public houses, take-aways and A2 class uses. There is no defined town centre with the commercial units being arranged along Carmarthen Road interspersed with existing residential dwellings. The streetscene is dominated by the Co-op foodstore and associated car park.
- 4.252 Aside from the Co-op, there are no national multiples present in Kilgetty.

Pedestrian Flows

- 4.253 Kilgetty was observed to be busy with the dominant focus of activity being the Co-op foodstore. A number of vehicles were also observed parking on the roadside to use the post office. In the remainder of the town, pedestrian activity was limited.

Accessibility

- 4.254 Kilgetty is located in a highly accessible location on the highway network which, coupled with the fact that it is not close to any large settlements, gives the centre a large retail catchment area. It is situated at the point where the A477 (between St. Clears and Pembroke Dock) and meets the A478 (between Tenby and Cardigan).
- 4.255 The centre is well served by public transport, being a stop on the majority of local bus services passing through the locality. It also has its own train station which is a 'request stop' on the West Wales branch line which connects the town to Pembroke Dock, Carmarthen and beyond.

Customer Views and Behaviour

- 4.256 People using Kilgetty stated that the aspect of it that they most liked was the fact that it was near or convenient for them (61.5% of respondents chose this answer). The next most frequent response, with 31% of people choosing this option, was the selection or choice of multiple shops within Kilgetty. Given the size of Kilgetty and the number of outlets that are actually within the centre, the response to this question is considered to be a direct reflection of the presence of the existing Co-op superstore. People's dislikes about Kilgetty included a perceived lack of safety, its business, and poor enforcement of traffic regulations. Positively, 70% of respondents said that there was nothing that they particularly disliked about Kilgetty.
- 4.257 In terms of the improvements that people felt could be made to the centre, just over 30% felt that there was nothing in particular that could be improved. The next most popular response was an improved level of policing or other security measures within the centre, closely followed by better public transport links. Other suggested improvements included a greater choice of shops, an enhanced range of leisure / fitness facilities, increased frequency of public transport, and a reduction in road congestion. A number of respondents (7%) also felt that there was a need for a bigger Co-op with another 15% looking for more banks within the centre.
- 4.258 The results suggest that whilst there do appear to be some issues in relation to the perception of safety / crime in the centre, Kilgetty is clearly valued as a convenient shopping destination for the vast majority of respondents using the centre.

State of Town Centre Environmental Quality

- 4.259 Kilgetty is dominated by the Co-op foodstore and the car showroom on Carmarthen Road. The centre is of average quality with the majority of buildings having a 'residential dwelling' style. Buildings are generally in a good state of repair with the Co-op's frontage being in particularly good condition. There are a number of more commercially styled units within the centre (to the west of the Co-op and to its east on the opposite side of Carmarthen Road), the majority of which are single storey and of little visual merit.

Conclusions

- 4.260 Kilgetty occupies a highly accessible location within southern-eastern Pembrokeshire and appears to be performing strongly in its role as a local retail centre serving the convenience shopping needs of the surrounding catchment. This role will be enhanced if the proposed foodstore redevelopment proceeds.

Goodwick Town Centre

- 4.261 Goodwick (alongside Kilgetty) is the smallest settlement in the retail hierarchy by a considerable margin. Notwithstanding this, the town is identified with Fishguard (by both the JUDP and the WSP Update) as a key driver to the regeneration of the North Pembrokeshire area. This is clearly a direct consequence of its role as the home of the principal port in North Pembrokeshire which creates freight and passenger links to Ireland.

Structure of the Town Centre & Retailer Representation

- 4.262 Goodwick town centre is not defined by the development plan (adopted or emerging). The majority of retail units are however located along Main Street.
- 4.263 The town centre takes a linear form, and has a limited range of shops clearly suited to local needs. These include a post office, a florist/corsage shop, a hair salon, a laundrette, a pharmacy, a general convenience store (grocer / off licence / butcher), and a tattoo studio. There are a number of other properties within the centre which appear to be in residential use but were formerly retail units as they have their shop fronts intact. There is also a chartered architectural design and management practice within the town centre.
- 4.264 Aside from the limited number of units on the Main Street, the town has seven food and drink establishments and two convenience stores – a small garage forecourt Spar and a Tesco Express store. Aside from these convenience operators, there are no multiple retailers represented in the town.

Pedestrian Flows

- 4.265 At the time of our survey, and as would be expected for a centre of this size and function, pedestrian activity was limited. Higher levels of pedestrian movement/consumer activity were observed at the Tesco Express store on The Parrog than in the town itself.

Accessibility

- 4.266 Goodwick is served by a half hourly bus service which runs between the town and Fishguard. This service runs from 8am to 11pm Monday to Saturday. The regular service between Fishguard and St Davids also stops at Goodwick. There are no direct services connecting Goodwick to the wider County.
- 4.267 By road, Goodwick is accessed directly from the A40 which links the town, and Fishguard with Carmarthen. There is a relatively large supply of free car parking in the town, however this is located in close proximity to the Ocean Laboratory and the ferry terminal at the harbour as opposed to the shops within the town. This also appears to be the reason behind the high level of parking provision in the town.

- 4.268 The ferry terminal in the harbour is served by a twice daily train service which runs from Swansea and terminates at the port to coincide with the arrival of the Rosslare ferry. The service does not, however, stop at the Goodwick rail station which closed in 1964.

State of Town Centre Environmental Quality

- 4.269 The town comprises a mix of good quality, well-maintained buildings alongside a number in need of repair. Generally however, the centre offers a pleasant shopping environment for local needs with ample pedestrian walkways and a high level of cleanliness.

Conclusions

- 4.270 As a town, Goodwick does not have any obvious retail function, other than as a local centre serving the day to day shopping needs of its local population. It clearly benefits from the presence of the Fishguard Harbour ferry port and provides a number of food and drink uses to serve the tourist population. However, the harbour is the key economic asset in the area and it is that which should be recognised in the County's policy framework. In light of Goodwick's scale and function, it is considered that its place in the County's retail hierarchy should be no more than as a local retail centre.

Retail Development Sites

- 4.271 As part of the healthcheck process, and in conjunction with PCC, this study has sought to identify any potential retail development opportunities within and around the existing town centres within the PCC administrative area. The exercise has been undertaken at a relatively high level and has sought to, firstly, identify potential sites and, secondly, undertake an initial assessment of their appropriateness for retail development. The purpose of this exercise was to highlight potential retail development opportunities that could be assessed in more detail should any available retail capacity be identified by the study.
- 4.272 The results of the assessment process are presented on a site-by-site basis in the proformas included in Appendix E. For ease of reference, however, the sites identified and the key headlines of the assessment process are summarised in Table 4.8 below.

Table 4.8 – Summary of Site Assessment Process

Town Centre	Site	Conclusions
-------------	------	-------------

Town Centre	Site	Conclusions
Fishguard	Site 1: Land Off West Street / Fishguard Junior School, Fishguard	This site has already been acknowledged (via the grant of planning permissions) as a suitable location for a new supermarket within Fishguard. Its town centre location indicates that it is a suitable location for retail development and the provision of a supermarket will assist in retaining a greater level of convenience and comparison shopping trips within Fishguard. In order to provide an acceptable form of development, the provision of an appropriate form of access will be critical, although we understand that the extant permissions have already sought to agree the key access principles. We recommend that notwithstanding the extant planning permissions for a supermarket across this site, this site is allocated within the LDP for supermarket-led retail development
	Site 2: Cattle Market	This is a site with an operational livestock market use. It has the potential to offer a commercially attractive retail location, although given its out of centre location any retail proposals for this site would be subject to the usual retail policy tests of need, sequential approach and retail impact. In addition, retail development in this location would need to be adequately accessed and overcome flooding constraints. In addition, and most importantly, a new and acceptable location for the existing livestock market use will need to be found and planning permission gained, prior to relocation and development of retail uses on this site. Overall, we do not consider that this site is a primary candidate for allocation for retail uses in the LDP
Haverfordwest	Site 3: Telephone Exchange And Adjacent Car Park	This site lies close to the heart of Haverfordwest town centre, however it feels separated from the primary retail core by poor pedestrian linkages (the former Woolworths store does however provide an opportunity to create a new (and direct) pedestrian link). The main redevelopment potential of this site lies in the surface level car parking element, as the existing telephone exchange may not become available and would, in any event, be very costly to relocate. In its present form, this site is unlikely to be attractive for large scale retail land use and is likely, subject to the resolution of car parking issues, to be more attractive for residential and commercial accommodation. This situation may change, however, if the former Woolworths store were to be included in any redevelopment scheme. The site should be considered for inclusion within any town centre boundary identified in the LDP.
	Site 4: Skoda Garage And Land At Swan Square	This site is a prime candidate for the extension of the primary shopping area in Haverfordwest town centre. It offers an opportunity to provide additional comparison goods retail floorspace which is well connected to and closely linked with the existing retail core of the town centre. Constraints to the redevelopment of this site will be the relocation of the existing car sales and retail uses plus flooding issues and access (to the adjacent car park) issues and this will need to be investigated further by PCC. The site should be considered for inclusion within any town centre boundary identified in the LDP.
Milford Haven	Site 5: Bingo Hall	This site has already been identified by the Milford Regeneration Framework as having considerable potential for new development within Milford Haven town centre. We support the proposals for this site and consider that it offers significant potential for improved retail accommodation within Milford Haven town centre. The relocation of existing uses on this site will be key to its deliverability, although we consider that it should be allocated as a retail-led mixed used development site in the LDP.

Town Centre	Site	Conclusions
	Site 6: Haven Heights, Charles Street	This site lies at the eastern end of the core area of Milford Haven town centre and has previously been identified as a key redevelopment/refurbishment opportunity in the Milford Haven Regeneration Framework. We support the recommendations of the Framework and consider that it offers the potential to provide modern retail floorspace which can retain existing occupiers and (potentially) attract new occupiers. There is an opportunity to expand the ground floor retail and commercial accommodation at the site to the front and rear of the existing footprint, although the need for on-site car parking will need to be taken into account.
	Site 7: Robert Street Car Park,	This site provides one of the main off street car parks in Milford Haven town centre. It has the potential to accommodate a reasonable amount of new development, although this is clearly dependant upon the re-provision of existing car parking spaces, either on site or elsewhere in the town centre. In order to protect the fragile health of Milford Haven town centre it is important that easily accessible car parking provision is made available. We do not consider that large scale retail uses in this location are attractive or desirable and if redevelopment is to occur then it will be for a residential/commercial-led mixed use development.
Narberth	Site 8: Former Narberth Junior School	The former Narberth Junior School has the potential to provide an extension to the core retail and commercial area in the town centre. It has the ability to accommodate part of the identified need for additional convenience and comparison goods floorspace within the Tenby / Narberth / Saundersfoot / Kilgetty area in close proximity to an existing town centre location. In order to complement the existing provision with Narberth town centre, the scale and type of proposed provision should be carefully considered, although the site should be allocated for retail development within the LDP.
Pembroke Dock	Site 9: St Govans Shopping Mall And Adjacent Retail Units	This site and surrounding area represents a key redevelopment project for the LDP. There is significant potential to improve the appearance and performance of this location. At present, this area suffers from a number of high profile and prominent vacancies and pedestrian movement within and around this area is poor. There is considerable potential for redevelopment to provide new modern retail units and also provide a new and direct link between the town centre and the adjacent Martello Quays development area and ASDA store.

5. QUALITATIVE & QUANTITATIVE NEED ASSESSMENT

Introduction

- 5.1 This section sets out an assessment of the qualitative and quantitative aspects of retail need in Pembrokeshire. The qualitative assessment draws upon the review of town centre health and retail provision in the preceding section of the report, along with the results of the household shopping survey. The quantitative need assessment provides a detailed analysis of available convenience (food) and comparison (non-food) expenditure and current retail expenditure flows across the County in order to understand the current turnover levels of town centre and out-of-centre retail facilities in the various settlements. These turnover levels are then compared against the existing retail floorspace stock to derive retail floorspace capacity (quantitative need) projections for the main settlements in the County.

Qualitative Assessment

- 5.2 In terms of the overall assessment of need, the consideration of qualitative factors is an important contributory element. Whilst an assessment of the growth in retail expenditure in the study area can show the levels of expenditure available to support additional retail floorspace in Pembrokeshire County, the case for additional provision also relates to providing a good distribution of locations, to improve accessibility for the whole community, and consumer choice is enhanced by making provision for a range of shopping facilities which allow genuine choice to meet the needs of the entire community. Accordingly, in the assessment that follows we have considered the following range of indicators.
- Our own qualitative assessment of the range of retail facilities within Pembrokeshire, examining the distribution of locations and access to the whole community.
 - Existing shopping patterns of local residents for convenience and comparison goods, including the levels of expenditure leakage to stores outside the PCC area.
- 5.3 When considering qualitative needs for new retail floorspace within the County, it is necessary to look at the current levels of expenditure being lost outside the County to adjacent areas. High levels of leakage can provide an important indication of a need to improve the quality of the existing retail offer within the County.

Expenditure Leakage: Convenience Goods

- 5.4 In terms of convenience goods expenditure (main food shopping trips), it is evident from the household survey that stores outside the PCC area are taking a limited amount of trade from within

the PCC area (approximately 18% or £28.7m⁵). It should be noted that survey zones 11 and 12 lie in close proximity to the borders with both Ceredigion County Borough and Carmarthenshire County. It is these zones where the greatest level of market share for convenience goods expenditure appears to be outside the County. This needs to be interpreted carefully, however, as zone 12 straddles the Pembrokeshire, Carmarthenshire, and Ceredigion Council areas. Within zone 12, almost 96% of the market share goes to stores outside the PCC area. Predominantly, this goes to the stores within Cardigan with smaller percentages going to stores within Newcastle Emlyn and Carmarthen. The only zone being wholly located within PCC and losing a significant amount of convenience expenditure (56% of the market share) to stores outside the PCC area is zone 11 which is based around Newport. The vast majority of this is going to the Tesco store in Cardigan.

- 5.5 For top-up food shopping trips, a similar pattern is evident with the vast majority of zones within PCC experiencing very limited levels of expenditure leakage. As was the case for main food shopping trips, zones 12 and 13 are again exhibiting a market share highly in favour of those stores outside the PCC area. This is a reflection of the geographic location of those zones. Of the zones that lie entirely within the County area, zone 10 (Narberth area) currently loses 23% of its trade outside the PCC area, with a limited amount of this going to the Tesco store in Carmarthen. These results are considered likely to be a reflection of linked top-up shopping and travel to work trips.
- 5.6 When considered in terms of turnover, and excluding the turnover from zone 13, Tables 5A and 5B within Appendix F indicate that £28.7m of turnover is being lost from PCC which equates to approximately 18% of the total turnover available within the survey's catchment area, and £10m of top up convenience turnover is being lost from a potential £66.9m across the catchment. The principal beneficiaries of this leakage are the Tesco Store in Cardigan (£17.05m) and the Morrisons and Tesco Extra stores in Carmarthen (£1.48m and £1.39m respectively). It should be noted however, that both these stores generate the vast majority of their turnover from the survey area (86% for Tesco, and 97% for Morrisons) from Zones 12 and 13. There is very little leakage from within the PCC area to these stores.
- 5.7 Our analysis of expenditure leakage from PCC has shown that the greatest proportion of main food expenditure is going to stores in Ceredigion (just under 14% of available expenditure), with the vast majority of this coming from Zones 11 and 12. Stores in Carmarthenshire are taking approximately 3% of the available expenditure available for convenience goods in the PCC area. In the case of top-up food shopping, 4% of total available PCC expenditure is going to stores in Carmarthenshire, and close to 9% is going to Ceredigion.
- 5.8 In overall terms, the analysis suggests that convenience stores within Pembrokeshire are performing well. Only very limited amounts of expenditure are being lost to stores outside the PCC

⁵ These figures exclude the turnover from Zone 13 as this lies entirely outside the PCC area.

area, and this is happening to a greater degree in the northern part of the County. This supports a qualitative need for additional foodstore provision in this area.

Expenditure Leakage: Comparison Goods

5.9 Turning to consider expenditure leakage on comparison goods, we have looked at expenditure loss from each of the survey zones to stores in both Carmarthenshire and Ceredigion Council areas. This has been considered for each of the seven goods categories covered by the survey and the key headlines are set out in the table below.

Table 5.1 – Comparison Goods Expenditure Leakage

Goods	% of Available Expenditure Lost from Zones 1 – 12*	
	Carmarthenshire	Ceredigion
Clothes / Footwear	25.6%	4.9%
Furniture, textiles, etc	12.2%	6.5%
DIY	10.7%	12.5%
Domestic Appliances	10.3%	6.0%
Electrical	10.3%	6.0%
Personal / luxury goods	10.9%	10.9%
Recreation	12.4%	6.9%
Total Comparison	14.7%	7.5%

* Zone 13 excluded as it lies entirely within Carmarthenshire .

5.10 As the table shows, just under 15% of the total available expenditure on comparison goods is being lost to stores in Carmarthenshire, and 7.5% is leaking to stores in Ceredigion.

5.11 The largest loss of available comparison turnover is for clothing and footwear. Out of the £93m available for these goods across Zones 1 – 12, 43.5% (or £40.5m) is being lost outside the PCC area, and of that £93m, approximately 59% is going to stores in Carmarthen – this equates to £23.8m of potentially available turnover. Those survey zones with the highest percentage of their own available expenditure being lost outside their area include zone 1 Tenby (43%), zone 4 Saundersfoot (33%), zone 6 Haverfordwest (21%), zone 10 Narberth (40%), zone 11 Newport (23%), and zone 12 Cardigan & Newcastle Emlyn (54%). The only real leakage of significance to stores in Ceredigion is from zones 11 and 12. This suggests a qualitative need for additional or improved retail provision for this type of goods, particularly in the zones identified above.

5.12 Turning to consider expenditure patterns on furniture, floor coverings, and textile goods, Table 7 in Appendix F shows that approximately £16.4m (or 33%) of the total turnover available on this type of goods is being lost to stores outside the PCC area. Of that, approximately £6m (or 12% of the total available expenditure) is being lost to stores in Carmarthenshire. Stores in Ceredigion are taking 6.5% (£3.2m) of available expenditure from Zones 1 – 12, with the majority of this coming from zones 11 and 12 – principally zone 12 at £2.8m. With respect to the expenditure lost on a zone by zone basis, it is only zones 1 (Tenby), 4 (Saundersfoot) and 10 (Narberth) which

experience a greater than 10% loss of their available zone expenditure to stores in Carmarthenshire. Zones 11 and 12 are leaking expenditure to stores in Ceredigion, at 14% and 34% respectively. This latter figure is likely to be a direct reflection of the large part of zone 12 that lies within the Ceredigion County Borough area.

- 5.13 For DIY goods, our analysis (Table 8 in Appendix F) shows that £9m of available expenditure is lost from zones 1-12 to stores outside the PCC area. This equates to approximately 23.4% of the available turnover attributable to those zones. Of this, £4.1m (or 11%) of the total available turnover is being lost to stores in Carmarthen. Stores in Ceredigion are taking approximately 12.5% (or £4.8m) of the available expenditure for the PCC zones. In terms of the expenditure lost on a zone by zone basis, it is once again zones 11 and 12 that are losing higher proportions of trade to stores in Cardigan. In terms of stores in Carmarthen, these can be seen to be pulling trade from zone 1 Tenby (11%), zone 4 Saundersfoot (10%), zone 10 Narberth (22%), and zone 11 Newport (16%). For Tenby, Saundersfoot and Narberth, Carmarthen takes the vast majority of the leakage lost. However, in the case of zone 11 Newport, the turnover lost to Carmarthenshire only equates to 30% of the total expenditure lost from that zone which suggests that the remainder or the majority is lost to stores in the wider region outside the household survey area. In the case of zone 12 (Cardigan and Newcastle Emlyn), our analysis has shown that this centre loses approximately 30% of potentially available expenditure to stores in Carmarthen, with 60% of its available expenditure going to stores in Ceredigion (predominantly Cardigan).
- 5.14 Expenditure patterns on domestic appliances broadly mirror those of DIY goods and clothing / footwear. Currently, 16.2% of the available expenditure on these goods is being lost to stores outside the PCC area, and of that 63% (or 10% of the total available expenditure) is going to stores in Carmarthen, with 37% (or 6% of the available expenditure) going to stores in Ceredigion (again predominantly to Cardigan). As was the case for other comparison goods, it is the Tenby, Saundersfoot, Narberth, and Cardigan & Newcastle Emlyn zones which are suffering the greatest levels of loss. However, aside from the Cardigan & Newcastle Emlyn zone, which is losing close to 40% of its available expenditure to stores in Carmarthen and 34% to Ceredigion, the remaining zones are losing between 7% and 13% of the expenditure available to them on a zone by zone basis.
- 5.15 Table 10 in Appendix F analyses the market share and turnover available to stores within the PCC area on TV, hi-fi, radio, photographic and computer goods (referred to as electrical goods). Of the £36.8m available for these goods across zones 1 – 12, 17.4% (£6.4m) is currently being lost to stores outside those zones - 60% to stores in Carmarthen, 34% to stores in Ceredigion (predominantly those in Cardigan). When each zone is considered in turn, it was evident that zones 1 (Tenby) and 4 (Saundersfoot) were losing between 10% and 16% of their available turnover to stores outside the PCC area – mostly to stores in Carmarthen. A similar situation was evident for zone 10 Narberth (13% leakage). For zone 11 Newport, approximately 7% of its available expenditure was being lost to stores outside the PCC area (50% to Carmarthen and 33% to Cardigan). As was the case for the other goods, expenditure patterns in zone 12 were slightly

different with 40% of the expenditure available for electrical goods going to Carmarthen and a further 34% going to Ceredigion. Between them, these two destinations accounted for approximately 97% of the total expenditure being lost to zones outside the PCC area. However, as Table 5.1 above shows, in overall terms the expenditure leakage from PCC on electrical goods is relatively low, indicating that stores in Pembrokeshire are performing reasonably strongly.

- 5.16 For personal and luxury goods items, our analysis has shown that approximately 27% (£19.4m) of available expenditure across zones 1 - 12 is being lost to stores outside the PCC area. 80% of this leakage is split equally between stores in Carmarthen and Ceredigion (with both taking £7.8m or 11% of the total available expenditure). For Ceredigion the vast majority of its expenditure is coming from zone 12, and of that the highest proportion is going to Cardigan. In terms of the trade drawn to stores in Carmarthenshire, this is being drawn from zone 1 Tenby (17.4%), zone 4 Saundersfoot (8.2%), zone 3 Pembroke Dock (6.8%), zone 10 Narbeth (14.8%), zone 11 Newport (6.3%) and zone 12 Cardigan and Newcastle Emlyn (34.6%). Unlike the other types of comparison goods where the vast majority of expenditure lost went to Carmarthenshire and Ceredigion, expenditure leakage on personal and luxury goods represented a smaller proportion of the total expenditure loss. This indicates that expenditure on these goods is being lost to stores within the wider region.
- 5.17 Table 12 in Appendix F shows that across zones 1-12, £19.2m or 26.4% of available expenditure on recreational goods is being lost to stores outside the PCC area. Of this, approximately 47% (£9m) is going to Carmarthen and 26% (£5m) is going to stores in Ceredigion. On a zone by zone basis, the highest proportions of lost turnover to stores in Carmarthen are from zone 1 Tenby (17%), zone 4 Saundersfoot (18%), zone 10 Narbeth (15%), zone 11 Newport (15%), and zone 12 Cardigan and Newcastle Emlyn (44%). Of these zones 11 and 12 are also experiencing losses of 20% and 38% respectively to stores in Ceredigion. In terms of how this relates to the total level of expenditure being lost from these zones to stores outside the PCC area, 67% of Tenby's leakage is going to Carmarthen, 85% of Saundersfoot's, 70% of Narbeth's, 35% of Newport's and 50% of Cardigan and Newcastle Emlyn's. For zones 11 and 12, both are losing about 45% of their total lost expenditure to stores in Cardigan.
- 5.18 In overall terms, our analysis has indicated that the dominant destinations for trade being lost from the PCC area, are Carmarthen and Cardigan. However, it is only the smaller towns or those with a specialist retail function (i.e. Tenby, Saundersfoot, Narberth, and Newport) that are consistently experiencing expenditure leakage to stores outside the County. Figures for zone 12 were consistently high but this is likely a reflection of the zone's geographic composition than an indication of high levels of trade loss. Importantly, trade loss to Carmarthen and Cardigan is typically less than 5% (and always no more than 10%) for the major towns in Pembrokeshire on all comparison goods, with the exception of clothing and footwear. Whilst the trade loss was not at alarmingly high levels, the improved future offer of Carmarthen (from the opening of St Catherine's Walk, particularly the Debenhams store) could exacerbate the situation. In light of this, it is suggested that this is monitored and any qualitative improvement in the retail offer in the major

PCC towns should focus on the clothing and footwear sector. Qualitative improvements to the comparison offer within the larger centres, e.g. Haverfordwest, could also assist in retaining expenditure within the PCC area as a whole by attracting expenditure from the smaller settlements that would otherwise have been lost to the County.

Haverfordwest

- 5.19 Haverfordwest is the largest retail centre in Pembrokeshire and the household survey indicates that it is able to retain high levels of main and top up food shopping expenditure. The survey indicates that all main food shopping trips generated by local residents in zone 6 (the zone in which Haverfordwest lies) are retained in Haverfordwest, whilst stores in the town are also able to attract a significant market share from zones 5, 7, 8, 9 and 10 across the study area. A similar pattern of shopping trips in and around Haverfordwest can also be found in relation to top up food shopping. These retention levels are unsurprising given the level of convenience retail provision in Haverfordwest which is dominated by two large out of centre stores: Tesco and Morrisons. Both of these stores, the Tesco in particular, have very large retail sales areas and sell a wide range of products making them attractive to main bulk food shopping trips. The Tesco and Morrison stores are complemented by a wide range of other food stores across the town including Aldi and Lidl stores which provide a deep discount convenience retail offers, plus an Iceland frozen food store within the town centre. These national retailers are also complemented by a range of smaller independent niche retailers, primarily within Haverfordwest town centre. The market survey results also highlighted that leakage of convenience expenditure from Haverfordwest to stores outside the PCC area is extremely limited. As a consequence of this existing provision we do not consider that there is a significant qualitative need for additional convenience goods retail floorspace provision within Haverfordwest although proposals which can add to the range and choice of facilities within the town and can support and enhance the vitality and viability of the town centre may be acceptable and should be considered on a case by case basis.
- 5.20 In terms of comparison goods shopping Haverfordwest is also the dominant retail centre within the County. The majority of shopping trips for comparison goods made by local Haverfordwest residents are retained within the town with almost all trips in relation to DIY, domestic appliances, smaller electrical goods, personal and luxury goods, and recreation goods retained within the town. There are slightly lower retention rates for furniture and floor coverings goods and clothes and footwear and those trips which are not retained by Haverfordwest stores are leaking to stores outside of the County (e.g. Carmarthen). Within the clothes and footwear, personal luxury goods and recreational goods categories the town centre is the dominant destination whilst out of centre retail warehousing provision becomes more attractive for the bulky goods categories of DIY, furniture and floor coverings and electrical goods.
- 5.21 In terms of the quality and type of comparison goods provision in Haverfordwest, there is a reasonably wide range of facilities within the town centre although recent additions to the comparison floorspace stock in recent years have concentrated upon out of centre facilities. In

particular, Springfield Retail Park (which lies adjacent to Withybush Retail Park) has been developed in recent years and provides accommodation for bulky goods retailers. In addition, Withybush Retail Park has been able to attract a wider range of comparison goods retailers including Next, Laura Ashley and Marks & Spencer will soon be opening a new store selling clothes, homewares and food in the former Focus retail unit. In addition, the recent extension of retail sales floorspace within the Tesco store has provided a considerably expanded comparison goods section including a new mezzanine floor.

- 5.22 As a consequence of the above we consider that Haverfordwest has a good range and quality of comparison goods floorspace provision across the town as a whole although the recent out of centre additions to the floorspace stock in recent years have in our view shifted the focus in this sector away from the town centre and new occupiers attracted to the town are being located in large retail units in outer centre locations which the town centre is not able to provide. In addition, a number of retail units at Withybush and Springfield Retail Parks are currently lying vacant and offer large areas of retail floorspace, in modern retail units, which are not available within the town centre. Therefore we consider that there is an opportunity to improve the quality and range of comparison goods facilities within Haverfordwest town centre in order to allow retailers who are attracted to the town to locate within the town centre.

Milford Haven

- 5.23 Milford Haven lies directly to the south of Haverfordwest and is one of the larger settlements in the southern part of the County. Within the convenience sector, food store provision is dominated by the Tesco store within the Havens Head Retail Park which currently benefits from a planning permission to extend the size of its retail sales area. Also outside of the town centre is a Lidl discount food store and there is a modest amount of convenience retail floorspace within the town centre. The household shopping survey indicates that around half of residents within zone 5 (the zone in which Milford Haven lies) are retained within the town, and the majority of these trips are attracted to the Tesco store. Two thirds of top up food shopping trips are also retained within the town and which are spread more evenly across existing facilities. Due to good road links, the survey shows Haverfordwest attracts a number of main food and top up food shopping trips from the Milford Haven area. This is unsurprising given the size of stores in Haverfordwest, their attractiveness to main bulk food shopping trips and the proximity of the town. We do not consider that there is a significant qualitative deficiency within the convenience retail sector in Milford Haven and existing provision allows for the majority of local needs to be met.
- 5.24 Within the comparison goods floorspace sector, provision within Milford Haven is split broadly equally between the town centre and Havens Head Retail Park which lies in an edge of centre location. The retail park provides units for Boots, Littlewoods, Instore and Q's whilst the Tesco store also provides a range of comparison goods. The range of comparison facilities within the town centre is limited and has suffered from the recent closure of the Woolworths store. The retention of comparison goods shopping trips within Milford Haven is relatively low and the

household survey shows that retention rates are between 10% and 30% for the town. In line with convenience shopping trips the vast majority of leaked expenditure is flowing to stores within Haverfordwest. The household survey reveals that shopping on personal and luxury goods is the best performing sector in terms of the proportion of trips retained within Milford Haven. As a consequence of this pattern of shopping trips, coupled with the level and quality of existing provision, we consider that there is a qualitative need for improved provision within Milford Haven. Having regard to the observations made within our health check assessment of the town centre, the focus for making qualitative improvements should be on the town centre which suffers from competition from the edge of centre Havens Head Retail Park and larger facilities within Haverfordwest.

Pembroke Dock

- 5.25 Over the past decade or so there has been considerable retail development activity within Pembroke Dock, focused primarily on out of centre locations. The focus for this development has been along London Road which now accommodates a large Tesco store (recently extended) plus units for Wilkinsons, Brantano, Argos, Peacocks and Instore. There is also a planning permission for additional retail Floor space on London Road which is likely to be occupied by an Aldi discount food store. Elsewhere in the town there is a Lidl discount food store and in the last few years Asda has taken over the former Co-op supermarket within the town centre. Beyond these national retailers there is limited other retail floorspace within the town and our health check assessments has indicated a relatively low range and scale of retail floorspace in the town centre.
- 5.26 In terms of shopping patterns 96% of residents in zone 3 (the zone in which Pembroke Dock lies) remain within the town for their main food shopping. The majority of main food trips are split between the Tesco and Asda stores. The town is also able to retain 83% of top up food shopping trips. Beyond the local area, food stores within Pembroke Dock, particularly the Tesco store, are popular with residents of the Pembroke, Tenby, Saundersfoot and Narberth areas. Indeed 65% of residents in the Tenby zone visit Pembroke Dock, 85% of Pembroke residents visit Pembroke Dock and half of residents of the Narberth area visit Pembroke Dock for main food shopping. Within the comparison goods shopping sector, Pembroke Dock is shown by the household shopping survey to be the second best centre in Pembrokeshire in terms of the retention of local expenditure (behind Haverfordwest). Facilities in the town are able to retain one third of clothes and footwear expenditure, 38% of furniture and floor coverings expenditure, over 80% of DIY expenditure, around 20% of expenditure on electrical goods, 50% of expenditure on personal luxury goods and 50% of expenditure on recreational goods. Given the dominance of Haverfordwest within the County it would be unreasonable to expect that Pembroke Dock could retain the vast majority of its comparison goods shopping trips although there is scope for higher attention rates to be achieved. Such increases may well occur as a result of a mezzanine floor being inserted into the existing Asda store and the retail provision which will be provided as part of the Martello Quays mixed use development within the harbour. Like Milford Haven, the focus for improving the qualitative aspects of retail provision within Pembroke Dock should be concentrated

upon the town centre which is considered by our health check assessment to be performing poorly. Across the town as a whole retail provision is considered to be relatively good for a town of Pembroke Dock's size however, the town centre is in need of improved provision in order to compete with out of centre facilities.

Pembroke

- 5.27 Pembroke has a smaller amount of retail floorspace than the nearby settlement of Pembroke Dock, all of which is concentrated within the town centre. Convenience provision within the town comprises a 797sq.m. net Somerfield food store along with a range of small local/independent niche convenience retailers. Within the comparison sector retail sale floorspace extends to 2,700sq.m. net and comprises a mixture of some national retailers and local independent traders. The household survey reveals that Pembroke is not able to retain a significant level of locally generated expenditure within zone 2 of the study area (the zone in which Pembroke lies). The survey reveals that only 4% of clothes and footwear shopping trips remain in the town, and there are similar levels of market penetration for furniture and floor coverings, DIY, electrical goods and recreational goods. The market share of Pembroke for personal and luxury goods is much higher than at 25% within zone 2. The majority of convenience goods expenditure which leaks from the Pembroke area flows to either Pembroke Dock or Haverfordwest. A similar pattern emerges for convenience shopping habits in the town with only 13% of main food shopping trips within zone 2 retained by the Somerfield and other convenience stores within the town centre, although the town is able to retain 45% of local top up food shopping trips. 85% of main food shopping trips from Pembroke residents flow to the nearby stores in Pembroke Dock (Asda, Tesco and Lidl). Whilst our health check assessments has confirmed that Pembroke town centre is healthy and provides a range of retail facilities that are attractive and well used by local residents, our qualitative review reveals that the centre serves a differentiated shopping function to the other nearby more popular centres of Haverfordwest and Pembroke Dock. It is clear that there are opportunities to improve the range and extent of shopping facilities within the town which are then able to retain more locally generated shopping trips.

Fishguard

- 5.28 Fishguard lies within zone 9 of the study area and the household survey results reveal that the town is able to retain 45% of locally generated main food shopping trips and 67% of locally generated top up food shopping trips. The most popular store within the town is the Somerfield which extends to 567sq.m. net sales and offers a relatively modest range of convenience goods when compared with other modern food stores across the County. However, due to its dominance within the main and top up foods shopping sectors, our quantitative assessment confirms that this store is significantly over trading. Where convenience shopping trips are lost from the Fishguard area they are generally flowing to stores within Haverfordwest to the south.

- 5.29 In terms of comparison goods shopping patterns, the household survey reveals that Fishguard is not able to achieve a market share of more than 10% across all comparison goods categories with the exception of personal and luxury goods where it attracts a 26% market share. The majority of leaked expenditure flows to Haverfordwest although some comparison goods expenditure does leak from Fishguard to other settlements further along the coast to the north east. Comparison goods floorspace provision is generally concentrated in the town centres of Fishguard and Goodwick and comprises mainly local independent traders although a couple of national multiples are present. The quantity of comparison floorspace within Fishguard and Goodwick is relatively low and this will be a contributing factor to why there are low levels of market penetration for the town within zone 9.
- 5.30 Since the 1990's a number of planning permissions have been granted within Fishguard town centre on a site currently occupied by a junior school and surrounding commercial properties. If provided, this supermarket will considerably increase the qualitative range and provision of convenience floorspace within Fishguard and it is also likely to improve the range of comparison goods facilities as well. Whilst the provision of the store would solve the current qualitative deficiency in convenience retailing we consider that there is a further opportunity to improve the range and quality of comparison retail provision within the town centre.

The Tenby / Saundersfoot / Narberth / Kilgetty area

- 5.31 In the south-eastern part of the County are a number of settlements: Tenby, Saundersfoot, Narberth and Kilgetty. In the previous 2001 Tenby Retail Study these were considered together in terms of the need for additional retail floorspace and it is considered sensible to continue this approach within this study. However, it should be noted that Tenby and Saundersfoot lie within Pembrokeshire Coast National Park and Narberth and Kilgetty lie within the County Council's administrative area and, therefore, detailed assessments of Tenby and Saundersfoot are excluded from this study. Zone 1 of the study area contains Tenby and the household survey indicates that 29% of main food shopping trips are retained by Tenby stores and 65% of main food shopping trips lost to stores in Pembroke Dock (primarily the Tesco on London Road). This pattern does not necessarily reflect the opening of Sainsburys in Tenby (in the former Somerfield store) as that store began trading shortly before the household survey was undertaken. Main food shopping retention in Tenby may therefore increase as trading patterns associated with the new Sainsburys are established. The survey indicates that retention of top-up food shopping trips in Zone 1 is higher at 58%. Zone 4 contains Saundersfoot and Kilgetty and the survey indicates that 24% of trips are retained by the Co-op in Kilgetty, with 10% flowing to Haverfordwest, 50% flowing to Pembroke Dock, 8% flowing to Tenby and 5% being retained by stores in Saundersfoot. In terms of top-up food shopping, retention by stores in Kilgetty and Saundersfoot is higher at 39% and 18% respectively, although leakage to Pembroke Dock, Haverfordwest and Tenby still occurs. Narberth lies within the southern part of zone 10 of the study area and the survey results indicate that the town is able to retain only 10% of main food shopping trips but 47% of top-up food shopping trips.

Leakage from the Narberth area flows to stores in Haverfordwest, stores in Carmarthenshire and also to the Co-op store in Kilgetty.

- 5.32 The leakage of shopping trips to stores in Pembroke Dock and, to a lesser extent, Haverfordwest is a clear sign that there is a qualitative deficiency in convenience retail provision within the Tenby / Saundersfoot / Narberth / Kilgetty area. As a consequence, we consider that there is an opportunity to improve the range and choice of convenience retail provision in this area which will in turn retain a greater proportion of trips. The recently permitted replacement Co-op store in Kilgetty will go some way to meeting this qualitative need, although further consideration will need to be given to whether further provision is required to serve the other settlements in this area.
- 5.33 It should be noted that when considering the need and location for additional convenience retail facilities in the Tenby / Saundersfoot / Narberth / Kilgetty area, the JUDP Inspector considered that, in the absence of a suitable site in or on the edge of Tenby town centre or at Narberth (which is the second largest settlement in this area), Kilgetty local centre is the next preferred location and would satisfactorily meet the identified need for a foodstore. There is therefore a need for this report to consider whether the Kilgetty allocation continues to meet the identified need within this area of the County or whether further provision is justifiable. Our quantitative assessment later in this section will go on to consider whether there is further surplus expenditure available to support additional convenience goods floorspace within this area and the results of this exercise will then be considered alongside our qualitative review and potential retail development sites.
- 5.34 In terms of comparison shopping within the Tenby / Saundersfoot / Narberth / Kilgetty area, the household survey indicates a significant level of leakage of trips primarily to Haverfordwest and facilities outside of the County, followed by facilities in Pembroke Dock. Such a pattern of shopping behaviour is consistent with the relative size of comparison goods shopping provision in the Tenby / Saundersfoot / Narberth / Kilgetty area when compared with facilities in Haverfordwest and Carmarthenshire. As a consequence, there is a qualitative deficiency in comparison shopping facilities in this area and there are certainly opportunities to improve the scope of provision.

Quantitative Assessment

- 5.35 In this section we establish the current performance of town centre and out of centre retail provision in Pembrokeshire and the basis for a forecast of the need for further retail floorspace over the period to 2021. The quantitative analysis statistic tables accompanying this assessment are attached at Appendix F.
- 5.36 We have used a conventional widely accepted step by step methodology with draws upon the results of the Pembrokeshire shopping survey of existing shopping patterns to model the existing flow of expenditure for each retail destination. In the analysis which follows we have used the following step by step approach:

- Step 1: definition of an appropriate geographic area of analysis with a quantitative assessment hereinafter known as the study area.
- Step 2: calculate the current (2009) population and expenditure available with the study area and forecast future population and expenditure growth over a specific period. In this instance we have used the period up to 2021. Population growth has been calculated using the latest population projections issued by the WAG for Pembrokeshire.
- Step 3: calculate the levels of convenience and comparison expenditure flowing to stores and centres within the study area using a market share analysis based on the results of the shopping survey undertaken by Research and Marketing Limited.
- Step 4: in order to assess the quantitative need for additional retail floorspace we have used a market share approach. This involves the assumption that retail floorspace within the towns in Pembrokeshire will achieve a particular market share available expenditure within the study area as a whole. This assessment is able to model changing forms of retail provision including possible increases within or decreases in trade following the implementation of committed retail schemes.

5.37 In the analysis which follows we have used the following assumptions and data sources:-

- All monetary values have been indexed to 2007 prices.
- Having regard to best practice the assessment has been carried out on a goods basis rather than a business basis.
- Data on current shopping patterns has been derived from the Pembrokeshire Shopping Survey 2009 (contained at Appendix B).
- The study area for the assessment has been set to match the household survey area. However, an allowance has also been made for net inflow of expenditure into the study area which will be described in more detail later in the section.
- Population for the study area has been derived from Experian Business Strategy (EBS) data which is based on the results of a 2001 census. This has been projected forward from 2009 using data provided in the population projections issued by the WAG in June 2009.
- Per capita retail expenditure for convenience and comparison goods has been derived from a series of retail planning reports provided by EBS and projected forward using information based on the EBS Publication Retail Planner Briefing Note 7.1 (August 2009). Information from these documents provides expenditure based on local circumstances and local social economic characteristics. Account has also been taken of special forms of trading within the survey area and expenditure estimates. The special forms of trading sector includes sales from mail order companies, sales from the internet, market stalls and sales direct from the producer or manufacturer and our allowance for this type of shopping takes account of the likely increase in the sector over the lifetime of the assessment. The proportion of the expenditure attributed to special forms of trading is outlined in the notes at Table 2 (Appendix F). When assessing the current trading performance of existing convenience retail facilities, reference has been made to data from Verdict Research and Retail Rankings 2009 Edition with the effect of utilising company performance sector for the financial year 2007/2008, this being the latest available year. Estimates of company performance take into account of non food sales where applicable.
- A quantitative assessment examines retail capacity over a period from 2009 to 2021 including an interim projection at 2014.

- All of the statistical tables referred to in the quantitative assessment are contained at Appendix F.
- 5.38 In order to provide detailed factual information on shopping patterns in and around Pembrokeshire County we have commissioned a new household survey covering 1,500 households. GVA designed the survey questionnaire in consultation with Pembrokeshire County Council and National Park Authority Officers, and Research and Marketing Limited (who undertook interviewing and data processing). The area for the household survey has been set to cover Pembrokeshire County and parts of the surrounding administrative areas to ensure that all potential regular users of retail facilities in the Pembrokeshire towns are included in the survey. The survey area has been based on post code sectors and is shown on the plan attached at Appendix A.
- 5.39 The survey results identify shopping patterns for households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove inappropriate responses such as internet or mail order shopping. For convenience goods the household survey includes questions on main food and top up food shopping. The survey also includes seven questions on specific comparison goods types which coincide with EBS definitions of comparison goods expenditure. Comparison shopping patterns are split into the following said categories:-
- Clothing, footwear and other fashion goods.
 - Furniture, floor coverings and textiles.
 - DIY and hardware goods.
 - Domestic appliances.
 - Smaller electrical products.
 - Personal and luxury goods.
 - Recreational goods.
- 5.40 The study area has been broken down into 13 constituent zones based on postcode sector areas. Population projections for these 13 zones are contained in Table 1 at Appendix F. Population data has been obtained from EBS at postcode sector level for a 2009 base and has been projected forward on the basis of the following information and assumptions:-
- Zones 1-11 of the study area broadly fall within the Pembrokeshire County Administrative area. Data from the Welsh Assembly Government's (WAG) population projections has been used to calculate a growth rate within the County up to 2021 and this has been applied across zones 1-11. For zones 12 and 13 we have relied upon population projections from EBS.
 - Once the countywide population growth rate has been set (for zones 1-11) we have then considered how the growth should be apportioned between these zones. Using future house building projections from PCC we have split the global growth rate between individual settlements and zones.
 - Information on the countywide growth rate and apportionment of this rate between individual zones and settlements is clearly set out in the notes to Table 1 at Appendix F. Should housing growth patterns change in the future then this can be easily amended.

- 5.41 In Table 2 the capita expenditure figures obtained from EBS are broken down into convenience and (the various sub-categories of) comparison goods. For each goods category, account has been taken of special forms of trading (internet, catalogue and mail order) and future growth and expenditure (per annum), both of which are derived from the latest guidance published by EBS in August 2009. Individual rates for future projections and special forms of trading are contained in the notes to Table 2. It should be noted that the expenditure projections are for the period up to 2021 however, we consider its projections post 2015 should be treated with a degree of caution given potential unforeseen changes to the economy in the medium to long term and would recommend to PCC that a review of the retail study is undertaken every 5 years.
- 5.42 By combining the population and the capita expenditure rates, Tables 3A to 3G set out the total retail expenditure within the study area by goods type. Table 3A estimates that convenience retail expenditure within the study area is expected to grow by £42m over the period 2009 to 2021. Between 2009 and 2021 comparison expenditure within the study area will grow by £182m.
- 5.43 The next stage of the quantitative assessment is to estimate current flows of retail expenditure within and surrounding Pembrokeshire County. Separate flows for main and top-up food convenience retail expenditure are provided and 7 sub-categories of comparison goods expenditure have also been examined (to match the questions used in the Pembrokeshire Shopping Survey).
- 5.44 Tables 4A and 4B at Appendix F set out the main food and top up food market shares of individual stores and centres across the District whilst Tables 5A and 5B outline the main food and top up food turnover of these facilities from each of the 13 survey zones. Table 5A and 5B provide the following information regarding the flows of convenience goods expenditure in and around the main settlements in Pembrokeshire (note: the figures given below are turnover levels derived from the study area and further allowance will need to be made in order to estimate the total turnover of individual stores and centres taking into account expenditure inflow):-
- Haverfordwest currently attracts some £58m of main food shopping expenditure and £14m of top up expenditure. As already noted Haverfordwest stores attract all expenditure generated by local residents (circa £22m) although Haverfordwest food stores are also successful in attracting large levels of convenience goods expenditure from across the County indicating that the town has a catchment area which encompasses zones 4-11 in the study area. The best performing stores within Haverfordwest are the Tesco and Morrison stores, the Tesco attracting a study area derived turnover of £36m and the Morrisons attracting a turnover of £25m. The remaining stores in the town have much lower turnover levels and in the case of convenience stores in the town centre gain the majority of their turnover from top-up food shopping trips.
 - Convenience facilities in Pembroke Dock attract £36.6m of main food shopping expenditure and £7.2m of top up food expenditure. Based on the survey results, Tables 5A and 5B suggest that the Tesco store has a study area derived turnover of £28m whilst the Asda store has a study area derived turnover of £11.6m. Whilst our own observations would suggest that the Tesco store is indeed the more popular of the two facilities and is also likely to take the larger proportion of expenditure within Pembroke Dock, we suggest that the survey results may have over estimated the

gap in turnover levels between these two stores. Elsewhere in Pembroke Dock, the Lidl store has a turnover of circa £3m and stores within the town centre have turnover of £0.8m. As already noted in the qualitative review a significant part of expenditure attracted to stores in Pembroke Dock comes from the local area (zone 3) although a considerable amount of the turnover attracted by the Tesco and Asda stores comes from zones 1, 2 and 4.

- Tables 5A and 5B indicate that convenience facilities in Pembroke have a total study area derived turnover of £4.8m with approximately half of this amount of money flowing to the Somerfield store within the town centre. The majority of Pembroke convenience stores' turnover is derived from zone 2.
- Convenience stores in Milford Haven have a total study area turnover of £20.5m with three quarters (£15m) of this level attracted to the Tesco store at Havens Head Retail Park. The catchment area for convenience shopping in Milford Haven is genuinely restricted to zone 5 of the survey area.
- Stores in Fishguard and Goodwick have a catchment area which is generally restricted to zone 9 of the study area and have a total study area derived turnover of £11m. Over 60% of this turnover flows to the Somerfield store in the town centre.
- Convenience stores in Tenby have a catchment area which is restricted to zones 1 and 4 of the study area and Tables 5A and 5B indicate a total study area derived turnover for Tenby of £7.3m. In our opinion this turnover level appears to be an under-estimate and it should be remembered that the household survey was undertaken shortly after the former Somerfield store within Tenby town centre was refurbished and re-opened as a Sainsbury's store. The Co-op store in Kilgetty has a catchment area covering zone 4 and, to a lesser extent, zone 10 of the study area, £5.2 of the £5.5m of study area expenditure attracted to Kilgetty flows to the Co-op store, which has a planning permission to extend its retail sales area (but which has not yet been implemented). The catchment area for convenience stores in Narberth is primarily based on zone 10 of the study area and stores in this town are successful in attracting £3.9m of convenience goods expenditure.

5.45 In relation to comparison goods shopping habits, Tables 6-12 at Appendix F set out the market penetration rates of existing facilities in the different towns for individual types of comparison goods. Each of these tables then converts the market penetration rates into levels of expenditure flowing to each centre and store. Using the results of the Pembrokeshire Household Survey, flows of expenditure within the clothes and shoes, furniture and carpets, electrical, DIY, personal and luxury and recreational goods categories have been examined. We have examined individual types of comparison goods in order to ensure that particular nuances of shopping patterns in and around the individual towns are fully incorporated into the quantitative assessment. For example the different towns within the County are likely to possess different roles depending on a number of factors including their size; geographical position in relation to the other settlements, their attractiveness to the tourism market and their different size of retail offer.

5.46 By amalgamating flows of expenditure for individual types of comparison goods shopping given in Tables 6-12 at Appendix F, the quantitative assessment is able to provide composite turnover levels for each of the main centres in Pembrokeshire attracted from each of the study area zones. The study area derived turnover data contained within Tables 6-12 at Appendix F can be summarised as follows:

- Haverfordwest is estimated to attract a study area derived turnover of £185m. This expenditure is attracted from across the County and stores in Haverfordwest are able to attract significant market shares in all types of comparison goods shopping from zones 1-11. The highest levels of leakage in comparison goods expenditure from Haverfordwest residents to facilities outside of the County comes from the clothing/footwear and furniture/floor coverings/household textiles categories. Haverfordwest is particularly attractive for clothing/footwear, furniture/floor coverings/household textiles, electrical goods and recreational goods shopping trips from across the County.
- Pembroke Dock has a study area turnover of £32.2m, making it the second highest performing shopping centre in Pembrokeshire, although it is some way behind Haverfordwest. Its core catchment is zone 3 of the study area, although it is also able to attract significant levels of expenditure from Zones 1, 2 & 4. Within the recreational, personal/luxury and DIY goods categories, stores in Pembroke Dock are more attractive to local residents than stores in Haverfordwest, although the reverse is true for the electrical and clothing/footwear categories.
- The majority of comparison goods expenditure flowing to facilities in Milford Haven is primarily restricted to zone 5 of the study area, although small amounts of expenditure also flow from zone 7. Comparison goods stores in Milford Haven have a study area derived turnover of £9.9m, with the largest contributors to this total being the clothing/footwear, recreational goods and personal/luxury goods sectors. More expenditure generated by Milford Haven residents is leaked to stores in Haverfordwest than is retained by local Milford Haven stores.
- Pembroke is assessed to attract some £3.4m of study area generated expenditure. Three quarters of this turnover is attracted by the personal/luxury and recreational goods sectors, where the town is able to attract market shares of 25% and 10% respectively. Market shares in other comparison goods categories are much lower.
- Fishguard has a study area derived turnover £5.2m, one third of which is attracted by the personal/luxury goods sector and one quarter by the clothing/footwear sector. The majority of comparison goods expenditure attracted to Fishguard is from zone 9 of the study area, although further expenditure is also attracted by zone 11 (Newport).
- Facilities in the Tenby / Kilgetty / Saundersfoot / Narberth area attract some £19m of comparison goods expenditure from the study area. Tenby is the best performing centre in this area in financial terms, although the influence of Tenby and the other centres does not extend beyond zones 1 and 4.

5.47 Following the establishment of current convenience and comparison turnovers and expenditure flows within Pembrokeshire, our quantitative assessment can move forwards to the assessment of future retail floorspace capacity. The capacity analysis is presented within the tables beginning with the prefixes 16 and 17 at Appendix F and the data contained therein is derived from previous tables within the quantitative analysis, in particular total available expenditure (Table 3), study area derived turnover for existing convenience and comparison facilities in each of the towns (Tables 5-12) and benchmark turnover of existing convenience facilities (Table 13). Capacity arises from the difference between expenditure flowing to a centre from within and beyond a catchment area (the total turnover or turnover potential), minus benchmark turnovers (see below) of existing and committed retail facilities.

- 5.48 The total turnover of retail facilities in a particular settlement comprises expenditure from local (study area) residents plus expenditure flowing into the study area from other sources such as tourists. In this instance, spending by tourists on retail facilities has been taken from the Pembrokeshire STEAM report 2008 which quantifies the local economic impact of tourism in the County. The report indicates that in 2008 tourists spent £49.6m at retail facilities in Pembrokeshire. In order that this total expenditure can be used as an input into individual estimates of convenience and comparison floorspace capacity for each main settlement, we have sub-divided it into separate convenience and comparison totals (on the assumption that tourists spend similar proportions of their total retail expenditure on convenience and comparison shopping as local residents), followed by assumptions about where this expenditure will be flowing based on the following factors: the location and attractiveness of each centre/area in the local tourism market; the amount of tourism accommodation in a particular area; and, the size of the centre and its retail composition. The expenditure inflow estimate for each centre is clearly shown on the accompanying quantitative need tables
- 5.49 A convenience goods quantitative need assessment for each of the main centres is shown at Tables 16a – 16f and the comparison goods assessments are contained at Tables 17a – 17f. A common format is adopted and shows the following information:
- The total level of available retail expenditure within the study area;
 - The level of expenditure which each centre attracts from the study area;
 - The market share of each centre within the study area
 - The level of expenditure inflow attracted by each centre;
 - The total turnover of convenience or comparison facilities in each centre, which is a combination of resident's spending derived from the study area plus trade inflow from beyond.
 - The benchmark turnover of existing retail facilities in each settlement; and
 - A residual expenditure estimate which is the different between the total turnover flowing to retail facilities in a particular settlement between 2009-2026 and the benchmark turnover of those facilities.
- 5.50 The market share of existing facilities at 2009 within a particular settlement is calculated by comparing the total expenditure levels in Table 3 with convenience turnover levels given in Table 5 or comparison turnover levels in Table 13. It is the proportion of residents' spending attracted from the study area relative to total available expenditure. In other words, it is an aggregate figure derived from zonal market penetration rates. Moving forwards to 2014-2021, we have considered whether the market share for convenience and comparison goods shopping in each key settlement should alter as a consequence of a retail commitment (e.g. extant planning permission or development under construction) which has the potential to affect shopping patterns in individual centres in Pembrokeshire.
- 5.51 At present, there are a number of retail commitments in Pembrokeshire which have the potential to alter existing shopping patterns:

- As part of the extant planning permission for retail sales floorspace at Withybush Retail Park in Haverfordwest, there is an allowance for up to 1,692sq.m. of the retail floorspace (across all units) to sell convenience goods. We understand that the former Focus DIY unit at Withybush Retail Park will soon be converted into a Marks & Spencer store which will take advantage of part of this allowance for convenience goods sales. The convenience sales area proposed to be occupied by M&S (696sq.m. net) has been taken into account within our capacity analysis, rather than the higher permitted threshold (1,692sq.m.), although the difference between these two amounts (circa 1,000sq.m.) may need to be included within any further convenience floorspace capacity calculations for Haverfordwest as and when future proposals come forward.
- Planning permission exists to develop a new replacement Co-op store within Kilgetty. The new store would comprise a maximum sales area of 2,450sq.m. with 80% devoted to the sale of convenience goods and 20% devoted to the sale of comparison goods. We understand that the existing Co-op unit in Kilgetty would be retained and converted into smaller retail units. As a consequence of this permission, our capacity analysis takes into account the increase in convenience and comparison floorspace between the existing and committed Co-op stores and also assumes that half of the existing Co-op unit will be occupied by comparison retail use (and the other half occupied by non-Class A1 retail use).
- In Pembroke Dock a number of retail commitments exist. First, ASDA has obtained a certificate of lawfulness for the insertion of a 2,500sq.m. gross mezzanine floor within its existing unit. It is assumed that, upon implementation of this mezzanine, the whole of the ground floor of the ASDA unit would be devoted to convenience goods sales, with comparison goods sales on the mezzanine floor. Second, planning permission was granted in 2005 for circa 1,000sq.m. gross of retail floorspace at a former petrol filling station/car sales & workshop on London Road. It is understood that Aldi is in advanced discussions regarding the provision of a discount foodstore within this floorspace and therefore we have assumed an appropriate convenience/comparison goods split for such a store in the quantitative assessment. Finally, planning permission has recently been granted for a mixed use marina development known as Martello Quays. This permission includes a 3,000sq.m. gross retail hall and we have assumed that the net sales area of this floorspace will sell comparison goods only. Ultimately, the final range of retail uses at Martello Quays will be determined as part of the reserved matters approval process.
- Two planning permissions exist in Fishguard for a new supermarket. These permissions are overlapping and only one could be implemented. The first permission relates to the former junior school on West Street and allowed for the provision of a 1,500sq.m. gross retail unit. The second permission covered the junior school and surrounding land and allowed for the provision of a 2,400sq.m. gross supermarket unit. The original permissions for these stores date back to 1997 and 1999 respectively and both have been renewed on a number of occasions. Our quantitative analysis allows for the provision of the larger (2,400sq.m. gross) supermarket and assumes that 70% of the gross area will be used as net sales area and 70% of the net sales area will be devoted to convenience goods sales and the remaining devoted to comparison goods sales.
- There is a planning permission for an extension to the existing Tesco store at Havens Head Retail Park in Milford Haven. The extension will add an additional 460sq.m. of convenience goods and 270sq.m. of comparison goods sales area.

- 5.52 Towards the bottom of each quantitative need analysis table a residual expenditure figure is provided. Where the residual figure is a positive number, this indicates that a quantitative need potentially exists for additional retail floorspace. Conversely, a deficit (minus figure) indicates that there is a potential oversupply of existing retail floorspace. Where a surplus level of expenditure exists, Tables 16 and 17 convert the residential expenditure level into a floorspace equivalent. In order to accomplish this task an average sales density is used. For convenience goods shopping, a sales density of £10,000/sq.m. at 2007 prices is used (projected forwards over the period 2009-2021 assuming annual increases in floorspace efficiency in line with existing retail floorspace). For comparison goods, a density of £5,000/sq.m. is used (and again project forward over the period 2009-2021 assuming increases in floorspace efficiency). Both of these sales densities are averages and retail performances of individual operators can vary, particularly for convenience goods operators. For example Asda and Tesco and other larger grocery operators have sales densities in excess of £10,000 per square metre. In contrast, smaller discount operators such as Lidl and Aldi have sales densities below £5,000 per square metre. Therefore, the sales density figure for new retail floorspace should only be used as a guide and reference should also be made to the residual expenditure figures when the County Council are faced with individual planning application proposals.
- 5.53 As a result of the above convenience commitments, we would expect the market share of Fishguard/Goodwick to rise as a result of the implementation of the supermarket planning permission of the former junior school. We are not aware of any detailed supporting information regarding the detailed trading effects of this store and therefore we have made considered assumptions regarding the potential uplift in market share of Fishguard/Goodwick in Table 16e. Given that the current beneficiary of the outflow of convenience goods expenditure from the Fishguard area is Haverfordwest, we would expect the market share of convenience facilities in Haverfordwest to fall as a result of the implementation of the Fishguard supermarket.
- 5.54 We would not expect the market share of convenience facilities in Pembroke Dock to rise to a significant extent as a result of the London Road, ASDA mezzanine and Martello Quays commitments, given the current good level of provision in the town at present. Conversely, we do envisage that the market share of convenience stores in Pembroke Dock may well fall as a result of the implementation of the Kilgetty Co-op commitment and any further convenience goods floorspace provision in the Tenby / Saundersfoot / Narberth / Kilgetty area. Further analysis of this issue is contained below.
- 5.55 As a result of the comparison goods floorspace commitments, we would expect the comparison shopping market shares of Pembroke Dock, the Tenby / Saundersfoot / Narberth / Kilgetty area, Milford Haven and Fishguard to increase. Pembroke Dock's market share is likely to increase by the largest amount due to the level of committed floorspace, with smaller increases for Milford Haven, Tenby / Saundersfoot / Narberth / Kilgetty and Fishguard. As a result of these increases, we would expect that Haverfordwest's comparison shopping market will fall to a certain extent.

5.56 The resultant convenience floorspace capacity analyses are contained at Tables 16a-f and indicate the following:

- Table 16a indicates that convenience stores in Haverfordwest attract £76m of convenience goods expenditure and have a 30% market share across the study area. When compared with current benchmark turnover levels (including existing and committed floorspace), there is a deficit in available convenience goods expenditure of £12.5m (in other words there is an over-supply of convenience goods floorspace). Assuming that the current market share continues until 2021, there will remain an oversupply of convenience goods floorspace (although this deficit will steadily decrease over time). It should also be noted that if additional convenience floorspace provision is provided in Fishguard and the Tenby / Narberth / Saundersfoot / Kilgetty area then the market share of Haverfordwest will fall to a certain extent and the resultant deficit in convenience floorspace capacity may well increase.
- Table 16b at Appendix F also confirms that there is a current oversupply of convenience goods floorspace within Pembroke Dock. This calculation takes into account the proposed Aldi discount store at London Road and the small increase in convenience floorspace at the ASDA store when its mezzanine floor is constructed. Assuming a constant market share, which is considered to be a best case assumption where new convenience goods floorspace is provided in the Tenby / Narberth / Saundersfoot / Kilgetty area, then the over supply of convenience goods floorspace in Pembroke Dock will continue to 2021.
- Table 16c indicates that there is currently a small over supply of convenience goods floorspace within Pembroke. Existing stores have a total turnover of £5.3m and the benchmark turnover of this floorspace is considered to be £6.9m. If the existing market share of Pembroke's convenience shopping sectors continues at a constant rate up to 2021, then there will remain no quantitative need for additional convenience goods floorspace in the town.
- Within Milford Haven, existing and committed convenience goods floorspace has a benchmark turnover of £27.7m against a 2009 total turnover potential of £22m. This leaves a deficit in available expenditure and an over supply of convenience goods floorspace. Assuming the existing market share of convenience shopping facilities in Milford Haven remains constant to 2021, then there will not be any quantitative need for additional convenience floorspace provision.
- Table 16e at Appendix F indicates that convenience goods floorspace within Fishguard/Goodwick currently attracts £12.6m of expenditure. This is equivalent to a 4.7% market share across the study area. Moving forwards to 2014-2021, we have increased the convenience shopping market share of Fishguard/Goodwick to 7.6% to take into account the likely impact of the committed new supermarket upon convenience shopping patterns. When compared against the benchmark turnover of existing floorspace and this commitment, Table 16e predicts that there is no capacity for further convenience goods floorspace in Fishguard/Goodwick.

5.57 In line with previous studies in Pembrokeshire, Table 16f provides a capacity assessment for the Tenby / Narberth / Saundersfoot / Kilgetty area. It indicates that stores in this area (including tourist expenditure) attract £27.1m of convenience goods expenditure, whilst the benchmark turnover of these facilities is £29.2m. Given the identified qualitative need for additional convenience retail provision in the Tenby / Narberth / Saundersfoot / Kilgetty area, and accounting for the committed replacement Co-op store in Kilgetty, we have examined a number of future scenarios for convenience floorspace capacity.

5.58 The first scenario assumes a constant market share and this indicates that there will be a small deficit in convenience expenditure over the period to 2014, followed by a small surplus of expenditure (£1.6m) at 2021. However, as outlined in previous studies and reaffirmed by our qualitative analysis, there is potential for a greater retention of convenience shopping trips within this area. In order to examine this potential, we have modelled a number of scenarios and these are outlined below:

- **Scenario 2 – High Growth in Market Share.** Assuming that suitable convenience shopping facilities are provided and they can help to retain 90% of shopping trips within zone 1, 70% of shopping trips within zone 4 and 40% trips within zone 10⁶, then the total turnover potential of stores within the Tenby / Narberth / Saundersfoot / Kilgetty area will increase to £42.4m at 2014 and, when compared with a benchmark turnover of £29.4m, this provides surplus expenditure of £13m. At an indicative benchmark sales density of £10,050/sq.m., this provides for an additional floorspace capacity of 1294sq.m. net at 2014, which rises to 1626sq.m. net by 2021.
- **Scenario 3 – Medium Growth in Market Share.** If a more conservative approach to potential increases in market share is adopted, which takes into account the potential that larger stores in Pembroke Dock and Haverfordwest will still continue to attract expenditure from the Tenby / Narberth / Saundersfoot / Kilgetty area, then we have modelled a market share of 70% for Zone 1, 60% for Zone 4 and 35% for Zone 10. This results in surplus expenditure of £7.4m at 2014, rising to £10.6m by 2021, which is equivalent to 736sq.m. net and 1024sq.m. net at 2014 and 2021 respectively.
- **Scenario 4 – Low Growth in Market Share.** We have also modelled an increase in market share for the Tenby / Narberth / Saundersfoot / Kilgetty area which reflects the likely impact of the replacement Co-op store on convenience shopping patterns. This indicates a capacity for an additional 559sq.m. – 883sq.m. net convenience floorspace between 2014-2021.

5.59 Within all of the above four scenarios, we have made the assumption that the Tenby / Narberth / Saundersfoot / Kilgetty area is able to attract around £9.2m of tourism expenditure at 2009, rising to £10.8m at 2021. This is equivalent to 50% of all tourism expenditure on convenience products within the whole of Pembrokeshire County. The Tenby / Narberth / Saundersfoot / Kilgetty area is a focus for self-catering holiday accommodation across the County and the settlements of Tenby and Saundersfoot in particular are popular places to visit for tourists. As a consequence, we consider that the Tenby / Narberth / Saundersfoot / Kilgetty area has the potential to attract a significant proportion of tourism expenditure. However, we are also mindful of the conclusions of the JUDP Inspector which indicated that our previous estimate of £14m-£15m of tourism expenditure at 2007-2016 was a 'substantial over-estimate'. As a consequence, we consider that the expenditure inflow estimates in the various scenarios in Table 16f should be treated as maximums. As a sensitivity test, we have also modelled an alternative range of scenarios 2 - 4

⁶ The existing market shares for zones 1, 4 and 10 are:

which assume that the Tenby / Narberth / Saundersfoot / Kilgetty area is able to attract 40% of convenience goods spending by tourists in Pembrokeshire. This provides the following surplus expenditure and capacity estimates:

- Scenario 2 – High Growth. Surplus expenditure of £10.8m at 2014 and £14.4m at 2021, equivalent to 1,077sq.m. net and 1,392sq.m. net.
- Scenario 3 – Medium Growth. Surplus expenditure of £5.2m at 2014 and £8.2m at 2021, equivalent to 519sq.m. net and 790sq.m. net respectively.
- Scenario 4 – Low Growth. Surplus expenditure of £3.4m at 2014 and £6.2m at 2021, equivalent to 342sq.m. net and 599sq.m. net respectively.

5.60 Turning to the comparison capacity assessment, a comparison between the total turnover levels at Tables 17a-f at Appendix F and the indicative benchmark turnover levels at Table 14 indicate that stores in Haverfordwest and Pembroke Dock may be overtrading, whilst stores in Pembroke, Fishguard and Milford Haven may be undertrading.

5.61 However, two issues are important here. First, it can be difficult to precisely estimate the benchmark turnover of comparison stores in a particular settlement given the range and diversity of retailers within a town centre and whose average benchmark sales densities are not published. Second, and important to the spatial planning of future retail provision in Pembrokeshire, basing future capacity on comparison against indicative benchmark levels (at Table 14) could polarise additional provision in Haverfordwest and, to a much lesser extent, in the Pembroke Dock and Tenby / Narberth / Saundersfoot / Kilgetty areas.

5.62 Having regard to the results of our health check assessments and the qualitative need analysis, we consider that there is merit in ensuring that all parts of the retail hierarchy in Pembrokeshire have the potential to attract additional provision and therefore we have assumed that existing comparison goods retail facilities in the County are trading in equilibrium. This ensures that growth is allowed for within the smaller centres rather than the existing larger (and more successful) centres of Haverfordwest and Pembroke Dock.

5.63 The capacity analysis at Appendix F indicates the following:

- Within Table 17a, Haverfordwest is assessed to attract £196m of comparison goods expenditure, which is equivalent to a 46% market share across the whole of the study area. Moving forwards to 2014-2021 we have refined the market share of the town to account for the implementation of commitments in surrounding settlements (such as Pembroke Dock, Kilgetty, Milford Haven and Fishguard) which are likely to attract expenditure which is currently spent within stores in Haverfordwest. On the basis of a 44% market share for Haverfordwest, there will be some £9.8m of surplus comparison goods expenditure by 2014, rising to £36.3m by 2021. Based on an indicative comparison goods sales density, these surplus expenditure totals are equivalent to a floorspace capacity of 1837sq.m. net by 2014 and 6000sq.m. net by 2021.

- The capacity analysis for Pembroke Dock is shown in Table 17b and we have modelled an increase in the town's comparison shopping market share from 8% to 10.5% for 2014-2021 to allow for the implementation of the Martello Quays, ASDA mezzanine and London Road commitments. This rise is equivalent to one quarter of the current market share of the town, although by 2014-2021 there will remain an oversupply of comparison goods floorspace within Pembroke Dock and the analysis indicates there is only very limited capacity (£1.2m or 198sq.m.) for additional comparison goods floorspace until after 2021. Based on our qualitative review of existing provision within Pembroke Dock, plus the current health of the town centre, we see no overriding reason to plan for a further increase in the town's comparison shopping market share and efforts should be concentrated upon the redevelopment and upgrading of existing town centre floorspace in order to make it more attractive.
- For Milford Haven, Table 17c also models an increase in comparison market share as a result of the Tesco extension. This increase from 2.5% in 2009 to 3% in 2014-2021 will provide a small level of surplus expenditure at 2014 (£1.0m) rising to £3.0m at 2021. This is equivalent to an indicative floorspace capacity of 489sq.m. net by 2021. Based on our qualitative review and the assessment of the current health of the town centre, this additional capacity should be directed to improving the level and type of comparison floorspace within the town centre through the redevelopment of existing town centre sites.
- Table 17d indicates that Pembroke has a low 0.8% market share for comparison goods shopping across the study area, attracting £3.3m of expenditure from the study area and boosted by an additional £0.7m of tourism expenditure. Assuming that the current market remains constant over 2009-2021 then Table 17d indicates a small level of additional comparison goods floorspace capacity (160sq.m. net) by 2021. Given the level of leakage of comparison goods expenditure from Pembroke to surrounding settlements and the opportunity to improve the qualitative aspects of provision in the town, then we consider that there may be an opportunity to increase its comparison shopping market share. However, in order to protect the health of the centre this should only be pursued where town centre sites become available.
- In Table 17e the comparison capacity analysis for Fishguard/Goodwick is provided. Given that the committed supermarket on land adjacent to West Street will include an element of comparison goods floorspace we have modelled an increase in the town's market share from 1.3% to 2% for 2014-2021. Taking account of the likely benchmark turnover of the committed comparison floorspace, Table 17e indicates that additional comparison goods floorspace capacity will only arise after 2014 when £1.1m of surplus expenditure will be available by 2021.
- Table 17f provides a capacity analysis for the Tenby / Narberth / Saundersfoot / Kilgetty area. Given the commitment for a new Co-op store at Kilgetty, which will increase the size of comparison floorspace within the town, we have modelled an increase in this area's market share from 4.8% to 5% over the period 2014-2021. Taking into account the

turnover of the committed floorspace, Table 17f predicts that there will be £2.0m of surplus comparison goods expenditure by 2014, rising to 36.1m by 2021. This is equivalent to an additional 1016sq.m. net comparison floorspace by 2021. Further increases in market share may well be appropriate, subject to the identification of town centre sites.

- 5.64 Within the final section of this report, we bring together and summarise our town centre health check, quantitative and qualitative assessments within our recommended strategy for the future of retail provision in Pembrokeshire for the LDP.

6. SUMMARY & RECOMMENDED STRATEGY FOR RETAILING IN PEMBROKESHIRE

Introduction

- 6.1 This report has been prepared by GVA Grimley Ltd ('GVA') on the instructions of Pembrokeshire County Council ('PCC') to prepare a retail study to provide the County Council with essential background information for the emerging LDP. The overall aim of the study is to provide a single evidence base to inform the retailing and town centres section of the forthcoming LDP including its strategy, area-wide policies and reasoned justification. The study will also provide the Council with a robust evidence base to make development control decisions on planning applications for retail development and specific allocations of land for retail development within the town centres. A summary of the findings of this study and our recommended retail strategy for retailing in Pembrokeshire is set out below.

Recommendations for Haverfordwest

- 6.2 Haverfordwest is the largest retail centre in the County and is able to attract the highest proportion of convenience and comparison goods shopping trips. The town has a good qualitative range of convenience shopping provision, which is split between edge of centre, out of centre and a small amount within the town centre. The town centre is also a significant focus for comparison goods shopping trips, although in recent years the amount of comparison goods floorspace in out of centre locations (retail warehouse parks and in the out of centre Tesco store) in Haverfordwest has increased significantly.
- 6.3 Our assessment of need indicates that there is no quantitative need for additional convenience floorspace provision within Haverfordwest up to 2021 and no significant qualitative shortfall in provision. However, if additional floorspace can be provided within or in easy walking distance of the town centre, then the Council should consider such proposals carefully. In terms of comparison goods floorspace provision, we have, after detailed consideration, adopted an approach which seeks to guard against the polarisation of additional comparison retail provision within Haverfordwest and which spreads future comparison floorspace capacity across the main centres of the County up to 2021. This does not stop the quantitative need for additional comparison floorspace capacity, which will be 6000sq.m. net up to 2021 and town centre planning applications alongside this capacity will not need to demonstrate that a need exists in support of their proposals.
- 6.4 The recent expansion of out of centre floorspace within Haverfordwest has improved the potential for its bulky comparison goods retail offering, although the town is also able to accommodate non-bulky comparison goods within out of centre locations. This growth has been at the expense of the

town centre and our recommended strategy is to focus the provision of new retail floorspace on the town centre in order to improve the quality of retail units which are able to accommodate new retailers in the town.

- 6.5 We consider that land at Swan Square and the adjacent Skoda Garage be considered as an allocation for retail use to extend the core retail area in the town centre, primarily for comparison goods retail use.

Recommendations for Milford Haven

- 6.6 Milford Haven is able to retain a reasonable proportion of convenience shopping trips, although some leakage is inevitable given the relative proximity of the town to Haverfordwest. The leakage in comparison shopping trips is much higher. Across the town the amount of retail floorspace is split between the town centre and the edge of centre Havens Head Retail Park. The Retail Park has been able to offer modern retail units which are able to accommodate national multiple retailers, although the town centre health check reveals that the town centre offer is suffering with recent closures and vacant units. There will be a number of reasons for this situation and our recommended retail strategy for Milford Haven is for the LDP to concentrate upon the redevelopment and improvement of existing sites within the town centre which offer the opportunity to retain existing occupiers and attract new retailers into the town. This conclusion reflects the regeneration framework for the town centre put forward in the recent Barton Willmore study of the town centre which identified opportunities to link Charles Street with Hamilton Terrace, and Hamilton Terrace with the marina beyond.

Recommendations for Pembroke Dock

- 6.7 Over the past decade there has been considerable retail activity in the development of (and planning for) new retail floorspace outside of the town centre. The focus for the development has been on London Road and the planned new mixed development at Martello Quays within the harbour. Overall, the town is able to retain a significant level of convenience shopping trips in the local area and attract further significant trips from areas to the east. The comparison shopping market share in Pembroke Dock is also the second highest in the County and the existing out of centre provision is likely to contribute a significant amount towards this situation. Our town centre health check of Pembroke Dock reveals a failing centre, which suffers from a poor environment and a number of vacancies. We do not consider that there is a quantitative need for additional retail provision in Pembroke Dock up to 2021 and the qualitative need for improvements in provision should concentrate upon the town centre. We have identified the area around the St Govans Shopping Centre as a key redevelopment site which will enable the existing retail floorspace stock to be redeveloped to provide much improved modern accommodation linking Dimond Street to the planned new Martello Quays development.

Recommendations for Pembroke

6.8 Pembroke is an attractive town centre which is able to cater for a localised catchment area and also appeal to tourists visiting Pembrokeshire. It has a modest amount of convenience and comparison floorspace provision and attains relatively low main food and comparison goods shopping market shares, losing expenditure to nearby Pembroke Dock and Haverfordwest beyond. As a consequence, there is an opportunity to improve the level of shopping trip and expenditure retention within the town, although we have stopped short of recommending a definitive increase in the town's convenience and comparison shopping market shares due to the lack of short to medium term town centre retail development sites. An increase in the town's market share now could have the consequence of attracting out of centre proposals which may increase the retention of shopping trips but damage the health of the centre and its niche shopping role.

Recommendations for Fishguard

6.9 Fishguard is remote from the other main towns in Pembrokeshire and suffers from a leakage of main/bulk-food and comparison goods shopping trips. Haverfordwest is the main beneficiary of these trips. There are long-standing planning permissions for a new supermarket within Fishguard town centre which is likely to significantly improve the retention of main/bulk-food shopping trips and, to a lesser extent, comparison shopping trips. These permissions have been granted in outline and renewed on a number of occasions without implementation and we therefore recommend that the LDP identifies the area of these permissions as the location for a new supermarket in Fishguard. Implementation of the supermarket scheme will meet the need for additional convenience floorspace in Fishguard/Goodwick which can provide for a main/bulk-food shopping destination, although there is potential for further comparison goods floorspace to be provided subject to town centre sites coming forward.

Recommendations for the Tenby / Saundersfoot / Narberth / Kilgetty area

6.10 In line with previous studies, we have considered the Tenby, Saundersfoot, Narberth and Kilgetty areas together and have found a leakage of convenience and comparison goods shopping trips. The leakage of shopping trips to Pembroke Dock and, to a lesser extent, Haverfordwest indicates that there is a qualitative deficiency in convenience floorspace provision in this area. Assuming that a main/bulk-food shopping facility can be provided which retains a greater amount of convenience goods expenditure within this area we consider that there is a quantitative and qualitative need for additional provision.

6.11 When considering the need and location for additional convenience retail floorspace in this area, the JUDP Inspector concluded that, in the absence of a suitable site in or on the edge of Tenby town centre or in Narberth (which is the second largest settlement in this area), Kilgetty is the next preferred location and would satisfy the identified need for a foodstore. Kilgetty now has an

allocation for a 2,450sq.m. net foodstore and a planning permission has recently been granted for such a store. Assuming that this permission is implemented, we consider that it is able to satisfy the need for a store which is able to cater for main/bulk-food shopping trips across this area, although our quantitative assessment indicates that further convenience floorspace could be provided.

- 6.12 Provision of additional convenience floorspace to meet this quantitative need should be concentrated upon the town centre site identified in Narberth, plus the potential for additional floorspace in Tenby and Saundersfoot town centres. It is not within the remit of this study to identify sites within Tenby or Saundersfoot town centres for additional retail floorspace provision, although we make the clear recommendation that there is no immediate need to identify a further site outside of these centres for main/bulk-food convenience retail provision.
- 6.13 Our analysis also indicates that there is need for additional provision of comparison goods floorspace in this area. The Kilgetty allocation, and consequential relocation of the Co-op unit, will meet some of this need, as will the site identified by Narberth town centre. However, further capacity could remain and we recommend that opportunities are sought to accommodate this capacity within Tenby and then Saundersfoot town centres.