Planning Pembrokeshire's Future
Local Development Plan

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Background Paper for Local Development Plan: Retail

Main Towns

Development Plans

July **2008**

Executive Summary

This paper is a background paper presenting general trends in Town Centres across Pembrokeshire (excluding the area of the Pembrokeshire Coast National Park) and will be used as part of the evidence base for the emerging Local Development Plan (LDP).

Evidence from a range of datasets has been compiled in line with advice from the Welsh Assembly Government provided in Technical Advice Note (Wales) 4, Retailing and Town Centres – November 1996 which establishes the types of information Local Planning Authorities should consider when examining retail centres. The requirements of national planning policy documents are discussed in the Introduction and have been incorporated into this report.

The issues facing different centres and potential future directions identified in relevant documents such as the *Wales Spatial Plan Update 2008*, *The Pembrokeshire Regeneration Masterplan 2008-2012* and the *Haverfordwest Town Centre Regeneration Framework* have also been included in this paper to ensure that a consistent and holistic approach is taken by the LDP.

A retail hierarchy is established in this paper, identifying Haverfordwest as the main centre for retail in Pembrokeshire County Council's jurisdiction. Whilst Milford Haven is the second largest centre in terms of occupied A use class floorspace, other indicators suggest that it is struggling as a centre and that overall Pembroke Dock together with Pembroke are operating as the secondary retail provider for the south of the County. Fishguard and Narberth are both smaller centres serving rural hinterlands. Whilst Narberth has successfully developed a niche shopping offer, Fishguard has a smaller range of shops but still plays an important role within the North of the County.

Common issues across all of the centres to varying extents are a need to upgrade the built environment, a limited range of shops and parking and congestion problems.

The focus for the LDP as a result of this paper will be on defining appropriate Town Centre boundaries and policy options to apply within those boundaries. In line with National Policy, the focus will be on renewing traditional town centres as the most appropriate location for retail.

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Glossary of Terms

Class A1	Shops of all types including superstores and retail warehouses, also includes hairdressers, sandwich bars (except those selling hot food), travel agents, launderettes, dry cleaners, and showrooms except car showrooms.
Class A2	Financial and Professional services to visiting members of the public, including banks, building societies, estate agents, betting offices.
Class A3	Food and drink outlets' including restaurants, pubs, wine bars and takeaways, also includes some other uses such as launderettes.
Class B1	Business use including offices (other than those falling in Class A2), research and development and industrial processes, provided the use could be carried out in any residential area without detriment to amenity by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.
Class B2	General industrial processes other than those falling within Class B1.
Class B8	Storage and distribution
Class C1	Hotels, boarding and guesthouses
Class C2	Residential Institutions including hospitals, nursing homes, residential schools and colleges.
Class C3	Dwelling houses occupied by a single person or family or by not more than 6 persons living together as a single household.
Class D1	Non-residential institutions including religious buildings, public halls, museums and medical services.

Class D2	Assembly and Leisure including cinemas, bingo halls, casinos and indoor sports.
Comparison goods	Retail items not bought on a frequent basis for example clothing, Televisions and white goods (fridges, dishwashers etc).
Convenience goods	Everyday essential items such as food.
Catchment area (in retailing terms)	The geographical area from which a retail destination draws its trade, sometimes measured in 'Drive Time'.
Capacity (in retailing terms)	Potential spending by the public within the catchment areas, with which to support existing and additional retail floorspace.
Bulky Goods	Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage and display.
Leakage	Loss of trade (spend) to an area outside the Town Centre
Primary catchment area	This is where 50% of the total catchment expenditure is achieved
Quaternary catchment area	This is where 100% of the total catchment expenditure is achieved.
Resident potential spend	This is the potential spend from the resident population (excluding tourists and workers) who live within the Primary, Secondary and Tertiary Catchments)
Secondary catchment area	This is where 75% of the total catchment expenditure is achieved.
Services	Providing a service rather than a product to a customer, for example banks and estate agents.
Sui Generis Use Class	Many uses do not fall within any Use Class and are therefore described as

	Sui Generis – a class on their own. For example, theatres, amusement centres, car showrooms, petrol filling stations and car hire offices are among uses which are specifically excluded from any of the defined Classes.
Tertiary catchment area	This is where 90% of the total catchment expenditure is achieved.
Use Classes Order	The Town and Country Planning (Use Classes) Order 1987 as amended by the Town and Country Planning (Use Classes) Amendment Order 1995, places the main uses of land and buildings into different categories. Planning permission is generally required for changes of use between classes and occasionally within a class.
Viability	In terms of retailing, a centre that is capable of commercial success.
Vitality	In terms of retailing, the capacity of a centre to grow or develop its likeliness and level of activity.
Wales Spatial Plan	People, Places, Futures, The Wales Spatial Plan was adopted by the National Assembly for Wales in 2004. The 2008 Update has recently been out for public consultation. The Wales Spatial Plan sets a vision for how each part of Wales should develop economically, socially and environmentally over the next 20 years.
Zone A value	One way of comparing the different values of shops is to use a zoning method. In this method the highest level of value is attributable to the front part of the shop, on the basis that it is this section, nearest to the pavement (frontage) which has the greatest value by attracting the passing shopper. The theory assumes that the level of value within

a shop decreases as the shop depth increases. The Valuation Office Agency adopts a zoning pattern of 3 zones (a, b and c), each measuring 6.1 metres in depth and then a remainder. The principle is to determine a price for Zone A (the highest level of value) as the unit for comparison. The plans from the Valuation Office therefore highlight the primary Zone A retail area in the towns.

1. Introduction

The framework for analysing retail trends in preparation for a Development Plan is set out in Planning Policy Wales (2002) as updated by the Ministerial Interim Planning Policy Statement ‘Planning for Retailing and Town Centres’ (MIPPS 02/2005). Additional advice is given in Planning Guidance (Wales), Technical Advice Note (Wales) 4, Retailing and Town Centres – November 1996 (TAN 4, 1996) and the Planning Policy Wales Companion Guide (2006).

MIPPS 02/2005 states that its 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 villages 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.

It goes on to state that *“Wherever possible this provision should be located in proximity to other commercial businesses, facilities for leisure, community facilities and employment. Town, district, local and village centres are the best locations for such provision at an appropriate scale”* (MIPPS, 02/2005, para10.1.2).

TAN 4 sets out three elements of area-wide information that might be useful to help establish Retailing and Town Centre background information. These are: population change, retail provision and retail expenditure.

This report examines existing levels of retail provision and retail expenditure within established town and district centres within Pembrokeshire County Council’s jurisdiction.

The Wales Spatial Plan Update Consultation in 2008, identifies a series of hubs in the Pembrokeshire Haven area. These include:

- **The Haven Towns** are identified as primary key settlements (Haverfordwest, Milford Haven/Neyland, Pembroke and Pembroke Dock), together producing a hub which is located at the centre of the area, and

- **Carmarthen**, which plays an important role in the area and in West Wales more generally

- **Fishguard together with Goodwick** which operate as a key settlement and are identified as being important in helping to drive the regeneration of North Pembrokeshire.

The vision of the Wales Spatial Plan Area Interim Statement is to achieve complementary roles between the Towns situated around the Haven –

Haverfordwest, Milford Haven/Neyland, Pembroke and Pembroke Dock. Fishguard is seen as a key hub in the North of the County. The idea of complementary roles is that each centre has distinctive individual strengths and that rather than competing with one another, the centres should instead develop in individually distinctive but complementary ways.

MIPPS (02/2005) states that Development Plans should establish the strategic role to be performed by the main centres in the retail hierarchy.

In terms of the Wales Spatial Plan centres within Pembrokeshire County Council's jurisdiction, Haverfordwest, Milford Haven/Neyland, Pembroke, Pembroke Dock and Fishguard/Goodwick are seen as key settlements.

Narberth is seen as a medium sized settlement with a service centre/employment/tourism function.

Crymych, Kilgetty/Begelly, and Letterston are seen amongst others as being local centres, some with significant tourism hubs.

This report therefore analyses the retail provision in the centres defined as hubs and medium sized settlements within Pembrokeshire. Neyland is not included in this analysis due to its limited retail provision.

The next section of this report sets out the type of data analysed and its source before the third section examines the broader regional context for retailing in West Wales.

The fourth section examines each of the Town Centres which come under Pembrokeshire County Council's jurisdiction in turn. Within the chapters on each centre a range of datasets are examined drawing on the framework of analysis set out in TAN 4. These include floorspace figures, diversity of uses, occupancy levels, expenditure levels, illustrative maps of rental values, perceptions of safety and occurrence of crime and residents views on town centres.

The fifth section presents a summary of the conclusions.

The final two sections contain references and additional information in the form of appendices.

2. Data information – Sources and Methodology

A hierarchy of centres within Pembrokeshire County Council's jurisdiction has been compiled, using data of gross floorspace of A Use Class units (Class A1-A3 of the use classes order), the strength of the town centre in terms of occupancy levels and the gross floorspace. **Haverfordwest** is the county's largest retail centre followed by **Milford Haven, Pembroke Dock, Pembroke, Fishguard/Goodwick** and **Narberth**.

Each town is allocated its own chapter and includes the following information:

Retail floorspace and quantity of units within town centres
Source: Pembrokeshire County Council Retail Survey June 2007
Brief description: Quantitative data of various indicators was collected for each town. Some of these indicators have been included here in table-form. The definition of 'town centres' corresponds with boundaries set out in the currently adopted Development Plan for the County – the Joint Unitary Development Plan for Pembrokeshire (JUDP). The base date for this survey is June 2007.

JUDP town centre definition map showing occupied/vacant units
Source: Pembrokeshire County Council Retail Survey June 2007
Brief description: Maps illustrating ground floor occupancy where the Use Class is A1-A3. The location of any vacant properties at the time of the survey (June 2007) are also indicated. These are included in Appendix 7. This is shown within the context of the current JUDP town centre boundary and primary frontage definitions.

CACI Retail Footprint Dataset
Source: Authority owned dataset purchased from CACI (2007).
Brief description: Retail Footprint is CACI's national comparison goods shopping model, covering circa 3,000 shopping destinations across Great Britain. It is built using gravity modelling principles, that is: the flow of customers from a postal sector will be directly proportional to the size of the Centre and inversely proportional to its Distance/Drivetime. Catchments, predicted shopper/expenditure flows and postal sector market share penetration outputs are recalibrated annually using retailer exit surveys and credit card transaction data. Retail Footprint recognises that shoppers have a choice therefore catchments overlap – Retail Footprint defines primary, secondary, tertiary and quaternary sub-catchments for each retail centre. In order to define these catchments, all Great Britain postal sectors are ranked according to a centre's achieved market share penetration, with the greatest percentage at the top. These proportions are then accumulated until at least 50% of total catchment expenditure has been assigned – this is the primary catchment. The remaining sectors are then accumulated to define the 3 remaining catchments at 75% (secondary), 90% (tertiary) and 100% quaternary respectively. Maps illustrating these catchment areas for comparison shopping have been included for Pembrokeshire's centres.

Additional data from CACI in relation to expenditure and loss of trade to other centres has also been included.

CACI ACORN Classifications
Source: Authority owned dataset purchased from CACI (2007)
Brief description: ACORN is a consumer analysis toolkit which breaks down the entire UK population into 5 broad categories, 17 groups and 56 types. It analyses the type of population that make up different locations and is one of the most respected consumer classification tools. It is based on information from the 2001 census, supplemented by consumer lifestyle databases which include information on financial habits, online behaviour, property types and other socio-economic or demographic trends. Appendix 3 includes a summary of ACORN types for all of the Towns, Pembrokeshire and Wales as a whole. The impact of the type of consumer likely to shop in a town is discussed within the conclusions for each centre.

Valuation Office Agency map of prime retail areas
Source: Valuation Office Agency Data, as at 1 April 2007
Brief description: These illustrative maps show the floorspace considered the prime retail locations in each town, according to the Valuation Office Agency. These should be viewed with caution, and have been provided merely as an **indication** of the 'prime zone' within the retail location as at 1 April 2007. The maps identify the prime (by value) retail area of each of the locations. The prime location may be summarised as the area with the highest value (in terms of zone A which is the most valuable area of a shop – the first 6.1 metres in depth) for any of the towns listed. These maps are indicative of the prime retail area (the most valuable zone A areas) within a specific town and do not therefore reflect a similar value across all towns. The information provided therefore should not be used to compare different towns with each other. The actual total retail areas are highlighted in red and encompass all buildings and properties within that prime zone, some of which may not actually be retail units.

Incidence of crime in town centres 2005-2007 – map and figures
Source: Dyfed Powys Police 2005-2007
Brief description: A map for each town centre has been produced, annotating the location of every crime reported in retail hours (between 9am and 5pm) from April 2005 – December 2007. The statistics include information on the number of crimes which occurred during retail hours which are classified as 'violent'. Appendix 5 contains the Home Office's breakdown of the types of crimes classified as violent. TAN 4 states that information on perception of safety and occurrence of crime can be useful in providing a picture of a centre.

Perceptions of Personal Safety
Source: Wavehill Consulting – survey of shoppers in Pembrokeshire (2007a)

Brief description: In a survey of shoppers in each of Pembrokeshire's towns, respondents were asked about how safe they felt in that particular town centre. For each town the results are provided in this section; a county-wide comparison graph is included in Appendix 2.

Views of Residents on Town Centres:
Source: Wavehill Consulting – Pembrokeshire Residents Survey (2007b)
Brief description: Wavehill Consulting were commissioned to undertake the Community Planning Residents Survey in 2007. The Pembrokeshire Citizen's Panel was used as a base sample for the initial phase of the survey. During the 2nd phase the base sample was supplemented with a targeted survey to correct any imbalances. 779 responses were analysed in total. The survey covered a range of topics; the results in relation to Town Centres have been included in this report.

Prime Retail Rents in Wales at May 2007
Colliers CRE produce data on retail rents for larger centres across the UK on an annual basis. Haverfordwest is the only town for which they collect this data in Pembrokeshire (their focus is on the larger centres). Typically the more successful a centre, the more popular it is for retailers to locate there and the higher the rents. This data has been included for Haverfordwest only along with the retail rents for the other top 28 centres in Wales.

Supermarkets in Pembrokeshire
Source: PCC Retail Survey 2007 and CACI ProVision Dataset
Brief description: A summary of supermarkets within Pembrokeshire County Council's jurisdiction and in neighbouring authorities (Pembrokeshire Coast National Park Authority and Carmarthenshire County Council) is provided with estimated floorspace (gross metres sq).

3. Pembrokeshire Town Centres – Context

The Wales Spatial Plan Update 2008 describes the Pembrokeshire Haven Area as being *“A pattern of small and market towns, none with a population in excess of 20,000 separated by rural areas populated with small villages and hamlets characteristic of rural Wales as a whole.”* (page 119).

Although this report only deals in detail with those towns which fall under the jurisdiction of Pembrokeshire County Council, it is important to understand and recognise the inter-relationships that exist with other centres in the area which are located in adjoining authorities.

Carmarthen (in Carmarthenshire County Council’s area) is a key service centre with the greatest retail offer of any centre West Wales. The retail element available within Carmarthen is likely to increase given the planned new shopping development on the old mart site which will include Debenhams as an anchor store. Carmarthen plays a pivotal role between a number of different areas and is an important retail destination for many Pembrokeshire residents.

Cardigan (in Ceredigion County Council’s area) although slightly smaller in scale than Carmarthen is also an important service centre particularly for the population of the North of Pembrokeshire. Newcastle Emlyn is also a much smaller niche shopping destination.

Within the area under the jurisdiction of Pembrokeshire Coast National Park Authority, Tenby is an important centre in the south of the county, serving both residents and tourists. Smaller centres such as Saundersfoot, St Davids, and Newport also play a significant role particularly in relation to tourism.

In terms of retail offer, CACI defines the hierarchy of centres in West Wales as follows:

Centre	Score	Type of Centre
Carmarthen	299	Value Regional Town
Haverfordwest	165	Value Regionial Town
Cardigan	55	Rural Centre
Tenby	54	Rural Centre
Pembroke Dock	33	Rural Centre
Milford Haven	24	Small Rural Centre
Fishguard	18	Small Rural Centre
Narberth	9	Small Rural Centre
Pembroke	8	Small Rural Centre

(Source CACI 2007)

Data is from CACI's Retail Modeller (2007). The score is an indication of how attractive a centre (the greater the score the more attractive, the lower the score the less attractive). The type of centre indicates the size of the centre and the sort of area that it serves.

This hierarchy can be compared with the hierarchy that would be established if it were to be based on Town Centre (as defined under the JUDP) floorspace figures (PCC Retail Survey). These figures are analysed in more detail in individual chapter's on PCC's individual centres, however for comparison purposes, a summary of PCC's centres in floorspace terms is presented here:

Town Centre (as defined by JUDP)	**Occupied A Class Gross Floorspace (m^2)**	**Resident Spend (CACI)[1]**
Haverfordwest	**43,618**	**£64,868,382**
Milford Haven	**14,762**	**£9,807,288**
Pembroke Dock	**13,394[2]**	**£14,199,341**
Pembroke	**14,044**	**£9,519,325**
Fishguard	**12,774**	**£8,738,909**
Narberth	**7,805**	**£8,860,462**

[1] Note resident spend does not include spend by tourists.
[2] Pembroke Dock appears with these figures to have less A class floorspace than Pembroke, this is however due to the comparison of town centres as defined by the JUDP, as Pembroke Dock has a large number of A class retail units which operate on the edge of the existing centre which have not been included within this total.

Haverfordwest has a much greater floorspace and larger offer than any other town within PCC's jurisdiction, it is clearly dominant within the County. In the wider region however, it has a smaller retail offer than Carmarthen. Other centres in Pembrokeshire have very similar levels of A class floorspace, although as the analysis later on in the report demonstrates, many are operating in very different ways. Narberth although the smallest centre listed here, is a thriving example of a niche shopping market.

The Wales Spatial Plan Update 2008 notes that centres in the Pembrokeshire Haven area have an enhanced service function compared to their population. *"Because of the area's rurality, relative peripherality and population sparsity, its most populous settlements need to fulfil roles and functions that would normally be associated with much larger towns."(p122)*

The following chapter looks in detail at each of the principle town centres within Pembrokeshire County Council's jurisdiction.

4. Town Centres
4.1 Haverfordwest
Background

Haverfordwest is located in the geographical centre of Pembrokeshire and is the county's main administrative and retail centre. The Pembrokeshire Regeneration Masterplan's vision for Haverfordwest is for "new housing development supporting economic growth opportunities at the Withybush Business Park and Haverfordwest Airport". The town's retail sector should support these developments with a vibrant town centre accessible to the residents of the county by road and public transport. The Wales Spatial Plan Update 2008 and Haverfordwest Town Centre Regeneration Framework (2008) note that Haverfordwest's town centre is currently underperforming and that a key focus therefore needs to be on town centre renewal.

Floorspace figures
Occupied retail floorspace (gross m²) by use class

	Town Centre (as currently defined by JUDP)
	Area gross m² all floors
Class A[3]	**43,618**
Class B	15,072
Class C (does not include all residential)	5,734
Class D	2,794
Sui Gen	115
Not Known / No info	7,194
Unoccupied	**10,461**

No of ground floor units unoccupied (all):28

A class units and floorspace

	Town centre (as currently defined by JUDP)		
	No. of units	**% of Total Occupied**	**Area (gross m² all floors)**
Total A Use Class	**272**		**44,996**
Total Convenience	19	7.3	2,945
Total Comparison	138	52.9	24,019
Total Services	103	39.5	16,400
Not Known	1	0.4	254
Total Occupied	**261**	**100.1**[4]	**43,618**
Unoccupied	**11**		**1,378**

[3] Of the Use Classes Order – see Glossary for definitions
[4] Does not equal 100.0% due to rounding.

(formerly A class)			

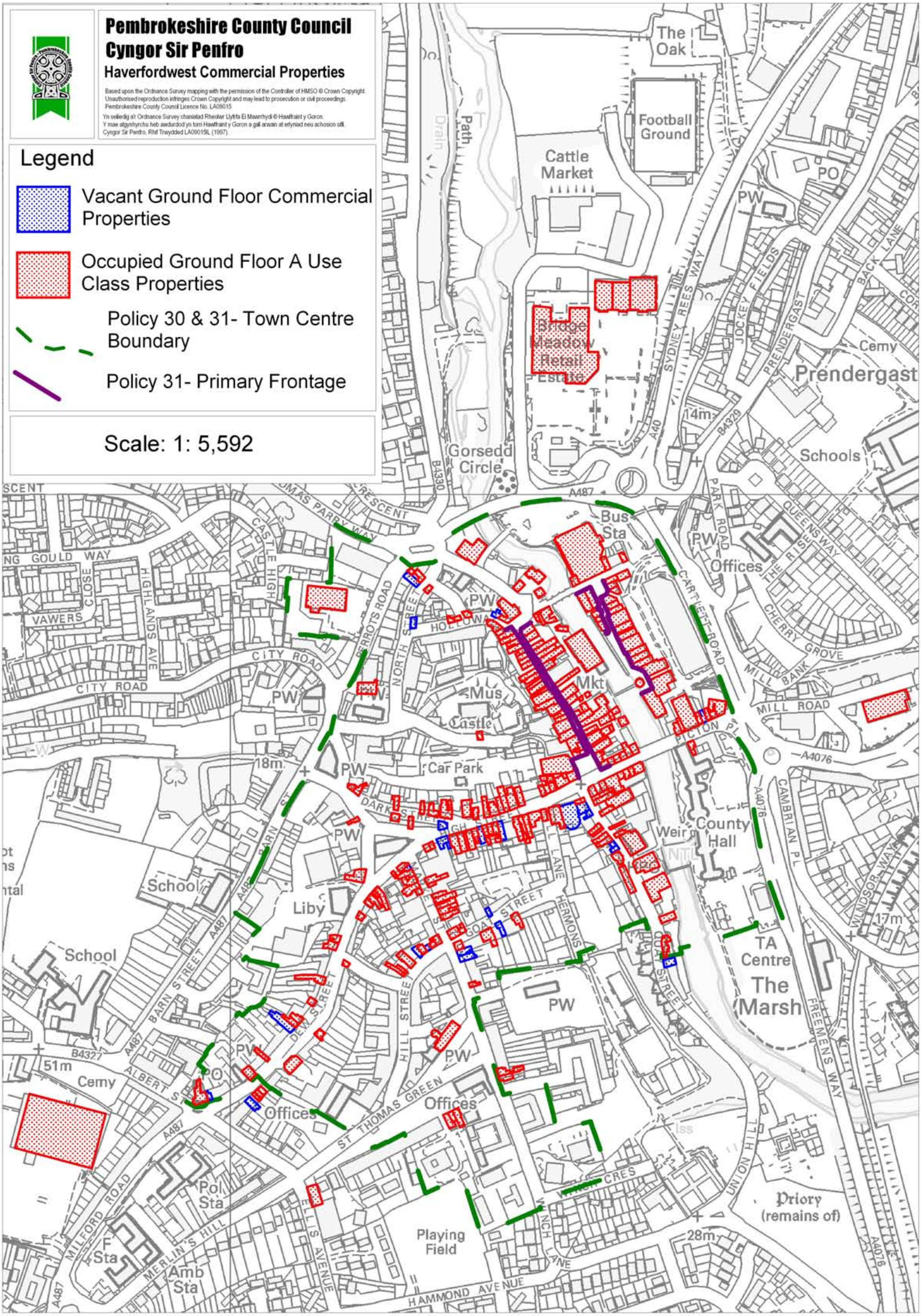
It should be noted figures for Haverfordwest are not comprehensive with regards to retailing outside the town centre. A further important component of Haverfordwest's retail offer is the edge of centre and out of town retail parks. There is additional out of town offer in the form of Tesco and Aldi (floorspace figures shown in Appendix 1 which lists supermarkets).

There are currently three major out of town retail parks in Haverfordwest, the third – Springfield, opened in spring 2008. These parks are all located to the north east of the Town Centre

Additional out of Town Retail Space in Retail Parks:

Retail area	Bridge Meadow	Withybush	Springfield
Units	4	8	7
Total area (gross m^2)	7,500 m^2	9,000 m^2	9,300 m^2

Maps highlighting the location of ground floor occupied A use class premises and vacant properties are shown on the next page.



Pembrokeshire County Council
Cyngor Sir Penfro
Haverfordwest Commercial Properties
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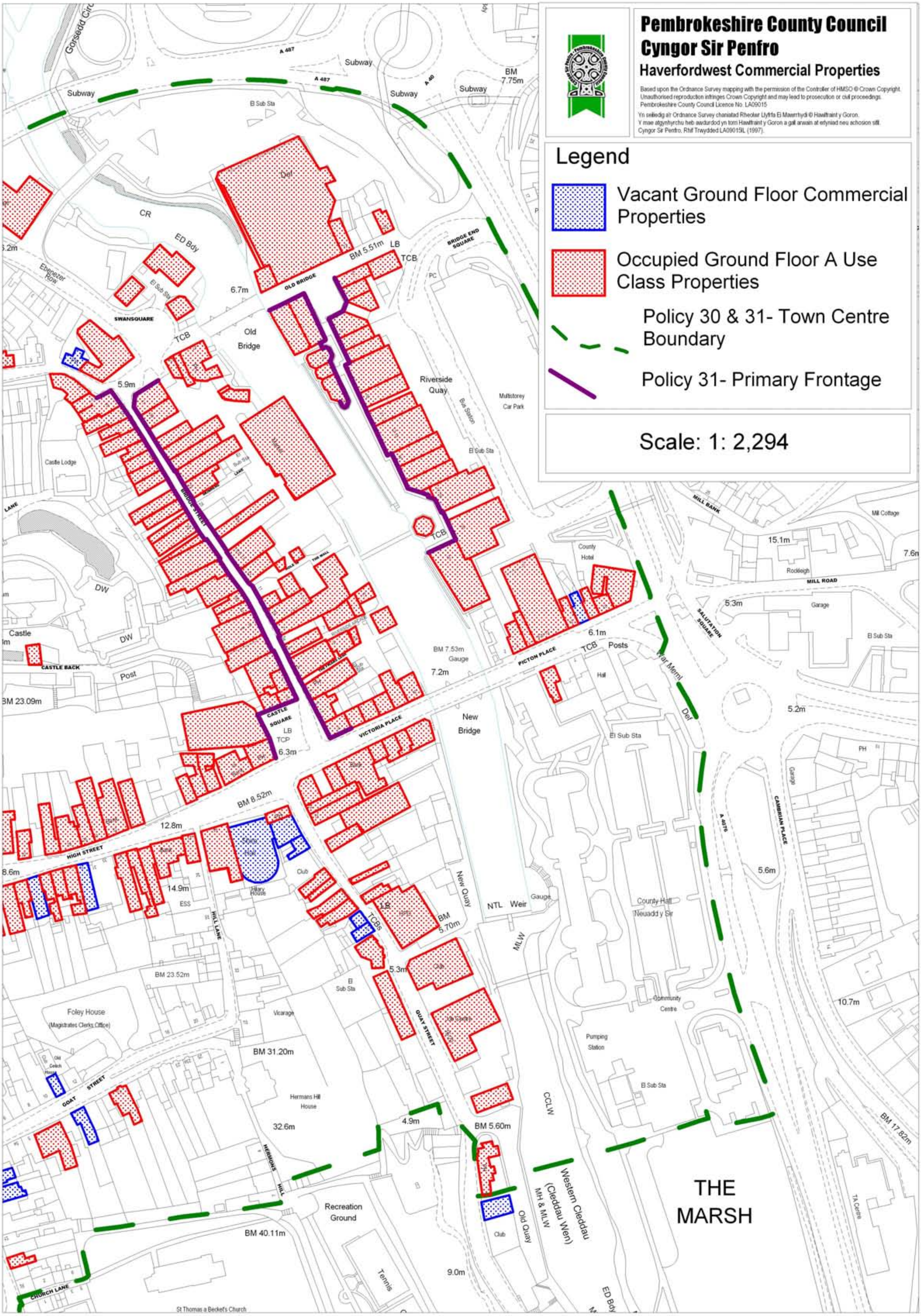
Yn seiliedig a'r Ordnance Survey chaniatad Rheolwr Llyfrfa Ei Mawrhydi © Hawlfraint y Goron. Y mae atgynhyrchu heb awdurdod yn torri Hawlfraint y Goron a gall arwain at erlyniad neu achosion sifil. Cyngor Sir Penfro, Rhif Trwydded LA09015IL (1997).
Legend
Vacant Ground Floor Commercial Properties
Occupied Ground Floor A Use Class Properties
Policy 30 & 31- Town Centre Boundary
Policy 31- Primary Frontage
Scale: 1: 5,592
The Oak
Football Ground
Cattle Market
Path
Drain
Bridge Meadow Retail Estate
SYDNEY REES WAY
JOCKEY FIELDS
PRENDERGAST
BACK LANE
Cemy
Prendergast
PO
PW
Schools
Gorsedd Circle
B4330
B4329
A40
A487
14m
Bus Sta
CARTLETT ROAD
PARK ROAD
Offices
QUEENSWAY
THE RISE
CHERRY GROVE
MILL BANK
MILL ROAD
A4076
CAMBRIAN PL
PICTON PL
THOMAS PARRY WAY
CRESCENT
GOULD WAY
CASTLE HIGH
CLOSE
VAWERS
HIGHLANDS AVE
CITY ROAD
PERROTS ROAD
NORTH STREET
HOLLOWAY
Mus
Castle
Mkt
Car Park
18m
DARK STREET
County Hall
Weir
School
Liby
BARN STREET
GOAT STREET
HERMONS
LANE
TA Centre
The Marsh
WINDSOR WAY
17m
FREEMENS WAY
DEW STREET
HILL STREET
QUAY STREET
B4327
51m
Cemy
ALBERT ST
PO
ST THOMAS GREEN
Offices
Pol Sta
MILFORD ROAD
MERLIN'S HILL
F Sta
Amb Sta
ELLIS AVENUE
Playing Field
WINCH LANE
CRES
UNION HILL
Priory (remains of)
28m
HAMMOND AVENUE
Iss



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Legend
Vacant Ground Floor Commercial Properties
Occupied Ground Floor A Use Class Properties
Policy 30 & 31- Town Centre Boundary
Policy 31- Primary Frontage
Scale: 1: 2,294
Old Bridge
Riverside Quay
New Bridge
New Quay
Old Quay
Western Cleddau (Cleddau Wen)
THE MARSH
Recreation Ground
County Hall
Neuadd y Sir
Foley House
(Magistrates Clerks Office)
Castle Lodge
Castle
County Hotel
Multistorey Car Park
Bus Station
Community Centre
Pumping Station
Hermans Hill House
Vicarage
St Thomas a Becket's Church
Tennis
Subway

Haverfordwest Summary of CACI Footprint:

Resident potential (this is the potential expenditure available from the resident shopper population within the Primary, Secondary and Tertiary Catchments which are shown on the map on the following page). The market share is the percentage that Haverfordwest actually retains as a centre from the potential available to it.

Total Population	Total Households	Total Market Potential (£1,000's)	Centre Expenditure Potential (£1,000)	Market Share	Spend per capita (£)
39,126	16,892	£141,419	£87,073	61.6%	2,225.45

Note: the Primary catchment is where 50% of the total catchment expenditure is achieved; the Secondary catchment is where 75% is achieved, the Tertiary where 90% is achieved and the Quaternary 100%.

Resident Spend generated (in all catchments)

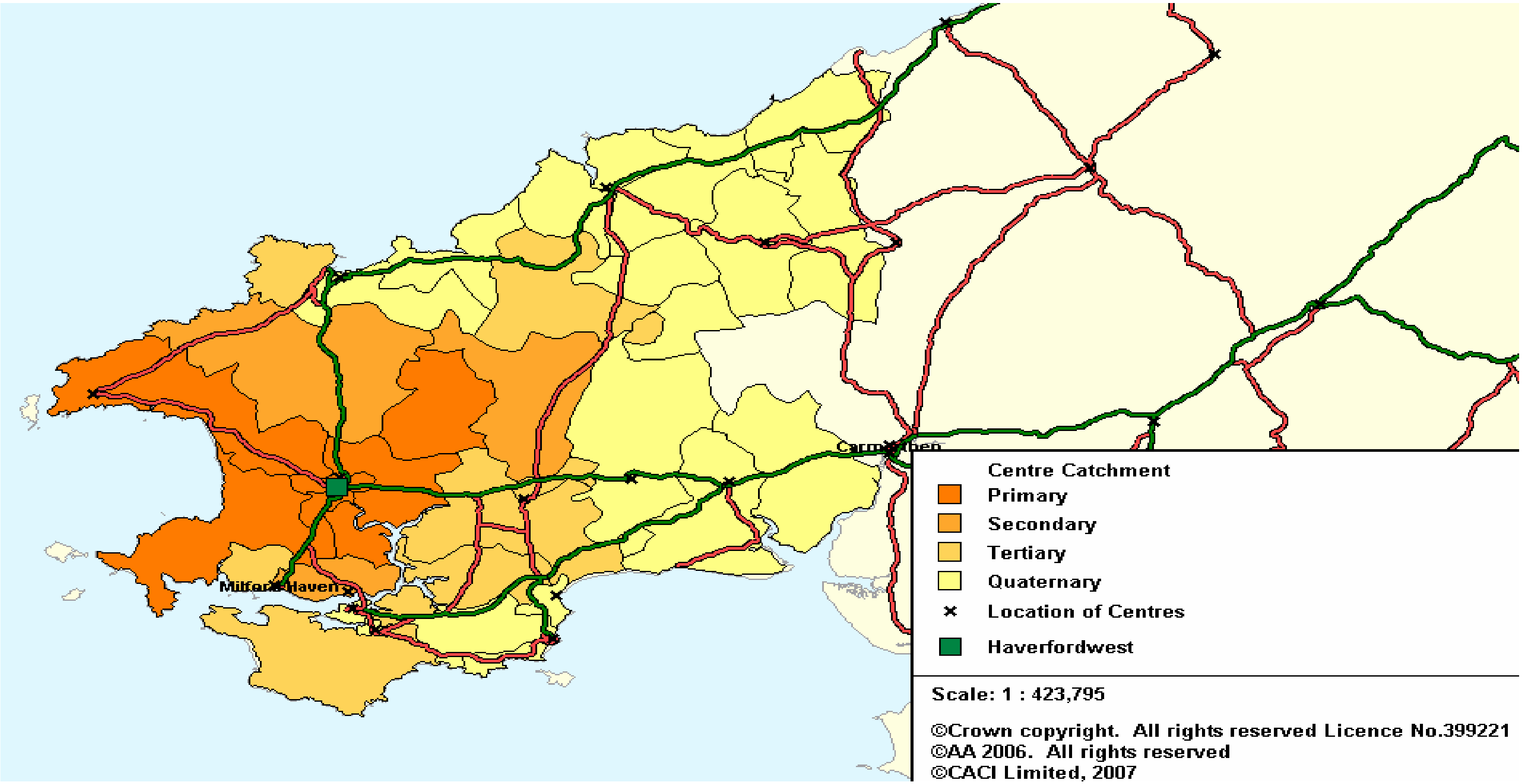
Resident Spend
£64,868,382

Haverfordwest attracts the largest total resident spend in Pembrokeshire (this figure does not include spend by tourists).
It has the largest shopper population, market potential and centre potential.

Leakage (loss of trade to area outside the Town Centre)

Haverfordwest attracts 75.6% of the market share from its core catchment (Primary and Secondary catchments). Principal leakage from this area is to Milford Haven (7.0%) and Haverfordwest Withybush Retail Park (4.1%).

Map illustrating Comparison Goods Shopping Catchment for Haverfordwest



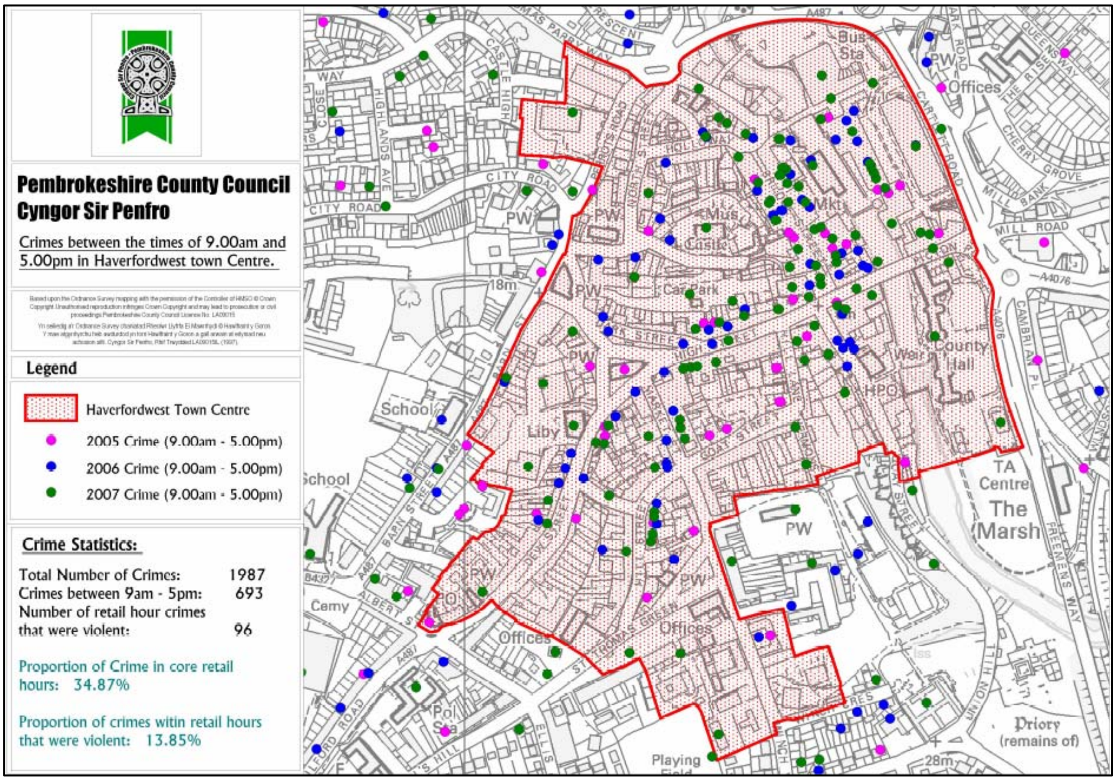
Source**: CACI Retail Footprint**

District Valuer's map of prime retail areas within Haverfordwest

Source**: District Valuer's Office**

Comment: The area of greatest prime value (highest Zone A values) is indicated as being that along Bridge Street, Riverside Quay and Picton and Victoria Place.

Incidence of town centre crime, April 2005 – December 2007



Source: **PCC Policy unit, data from Dyfed Powys Police**

A large proportion of the crime that took place during retail hours (9am to 5pm) occurred along the primary frontage areas in Bridge Street and the Riverside shopping area. A significant proportion also took place in areas where public houses are located, for example Castle Square and adjacent to the Library on High Street/Dew Street. Of all retail hour crimes over the three years, 96 were classed as violent crimes.

Perceptions of personal safety from shoppers (source: Shopper Survey by Wavehill Consulting 2007a).

Very Good	27
Good	161
Average	49
Poor	6
Very Poor	4
Don't know	3
Total	250

Only 10 out of a sample of 250 claimed to consider their safety as 'poor' or 'very poor'. Shoppers on the whole feel safe whilst shopping in Haverfordwest.

Views on Towns from Pembrokeshire Residents Survey 2007

In the Pembrokeshire Residents Survey 2007 (Wavehill Consulting 2007b) When asked **'Which ONE town centre in Pembrokeshire do you visit most frequently to shop?'**

48% (the greatest proportion) listed Haverfordwest as the single town centre that they most frequently shop at.

In an analysis of their views on Haverfordwest when asked what would encourage residents to shop there more frequently, the following top five priorities were identified:

- **A better range of shops (score: 670)**
- **More space for car parking (462)**
- **A more attractive environment (380)**
- **Better organised on-street parking (187)**
- **A better bus service to and from the town (182)**

A summary of trends across all town centres is provided in Appendix 6.

Rental Value Data for Haverfordwest

Colliers CRE collect information on in-town Zone A rental values across Wales on an annual basis. Haverfordwest is the only town for which they collect this data in Pembrokeshire (their focus is on larger centres). Typically the more successful a centre, the more popular it is for retailers to locate there and the higher the rents.

Centre	**2007 Rent £ per square foot**	CACI Score
1. Cardiff	**300**	864
2. Swansea	**160**	520
3. Newport	**140**	362
4. Wrexham	**105**	394
5 = Carmarthen	**90**	299
5= Cwmbran	**90**	274
7. Llandudno	**85**	275
8. Neath	**80**	186
9 = Bridgend	**70**	212
9 = Merthyr Tydfil	**70**	183
11 = Caerphilly	**65**	110
11 = Bangor	**65**	189
13 = Abergavenny	**60**	156
13= Rhyl	**60**	212
13=Pontypridd	**60**	176
13= Llanelli	**60**	200
17= Port Talbot	**55**	144
17= Aberystwyth	**55**	171
19= Haverfordwest	**50**	165
19= Barry	**50**	117
19= Monmouth	**50**	98
22. Blackwood	**45**	112
23. Colwyn Bay	**40**	117
24 = Brecon	**35**	66
24 = Aberdare	**35**	93
24 = Pontypool	**35**	55
27 = Ebw Vale	**30**	73
27 = Cardigan	**30**	55

(Source: Colliers CRE 2007)

Haverfordwest Conclusions

Haverfordwest is the dominant centre in Pembrokeshire. It has the greatest floorspace and greatest comparison offer of any centre in Pembrokeshire (PCC Retail Survey). As a result of this it is also the strongest shopping centre in the County, attracting the greatest spend generated. (CACI Retail Footprint).

However Haverfordwest has been struggling recently in comparison with what it could be achieving.

The Haverfordwest Town Centre Regeneration Framework Study (2008) notes that: *"Whilst Haverfordwest retains its position as the premier town in Pembrokeshire and lies at its heart, its economic and social role has diminished through dispersal of activities around the County and through increased mobility offering alternatives in Carmarthen, Swansea and beyond."(p5)*

Previous developments have led to substantial retail parks outside the traditional core shopping area of the town (Spring Meadow, Withybush and Springfield Bulky Goods Retail Park). Whilst these parks provide an important service in terms of Bulky Goods provision, some leakage of spend is occurring to these parks, away from the traditional town centre. The Haverfordwest Town Centre Regeneration Framework Study (2008) states that *"the attractive town centre has been undermined in its vitality by a progressive loss of facitilities away from the centre"(p5).* It goes on to recommend that to address these issues *"Active upgrading of the core of the town centre – from Swan Square to Castle Square and opening up the riverbank to greater public access, tied in with nearby enhancements to other areas will be crucial in drawing together the east and west bank parts of the emerging town centre." (p5).*

Surveys of shoppers reflect this feeling that the town is underperforming and that access and an improved public realm are important with the main priorities identified being a better range of shops, more car parking spaces and a more attractive town centre environment.

The focus of the LDP therefore will be on renewing and regenerating the traditional core of the town centre, in line with the principles set out in national policy (MIPPS 02/2005) which promotes traditional town centres as the most appropriate location for new development. The Haverfordwest Town Centre Regeneration Framework Study has identified upgrading the urban fabric and improving the retail offer (range of shops) within the existing town centre as important priorities. An examination of the current dispersal of occupied ground floor use class properties (PCC Retail Survey) indicates that the Town Centre Boundary under the JUDP has been drawn very broadly and incorporates large number of properties which are residential and areas away from the traditional core of the town. Within some of these areas it may be more appropriate to encourage residential use, with a stronger focus on protecting the retail core in a more tightly defined area around High Street, Bridge Street, Quay Street and the Riverside Quay. Under the LDP therefore, the area defined as Town Centre may be reduced with appropriate policies to reflect this. The Town Centre Regeneration Framework Study has also identified the importance of better connections between the East and West Banks of the river (Riverside Quay and Bridge Street), this will need to be incorporated into the LDP.

The data from the district valuer's office indicates that the most valuable retail area is the area around the Riverside and Castle Square. Policy options at a later date may wish to consider delimiting such areas as core or primary shopping areas, taking into consideration the occupancy and vacancy trends illustrated by PCC retail survey map analysis (Appendix 7). The Riverside Quay, along with Bridge Street, Victoria Place and Picton Place is now the most valuable area within the town.

The Dyfed Powys Police data indicates low levels of retail hour crimes with most crime occurring in the vicinity of public houses, after 5 pm. Wavehill Consulting's Survey (2007) indicated that most people surveyed (64%) felt that their perception of personal safety whilst in the town was Good.

Overall conclusions are that Haverfordwest is currently the principal retail centre for the County, drawing in a wide shopper population. The LDP should seek to consolidate this position, focusing on the renewal of the traditional town centre, aiming to improve the retail offer available within the centre whilst also upgrading the built environment.

4.2 Milford Haven
Background
Milford Haven has recently struggled as a retail centre, with vacancy rates of around 20% over all use classes. The Pembrokeshire 2008-2013 Regeneration Masterplan envisages that the town will use its maritime strengths to develop itself as a strong local service centre, focused on maximising commercial, leisure and tourist opportunities. The Wales Spatial Plan Update 2008 identifies that much of the town centre property needs to be upgraded to provide safer, more attractive neighbourhoods and retailing areas.

Floorspace figures
Occupied retail floorspace (gross m²) by use class

	Town Centre (as currently defined by JUDP)
	Area gross m² all floors
Class A [5]	**14,762**
Class B	4,843
Class C	14,355
Class D	3,535
Sui Gen	1,220
Not Known / No info	1,830
Unoccupied	**12,197**

No of ground floor units unoccupied (all):24

A class units and floorspace

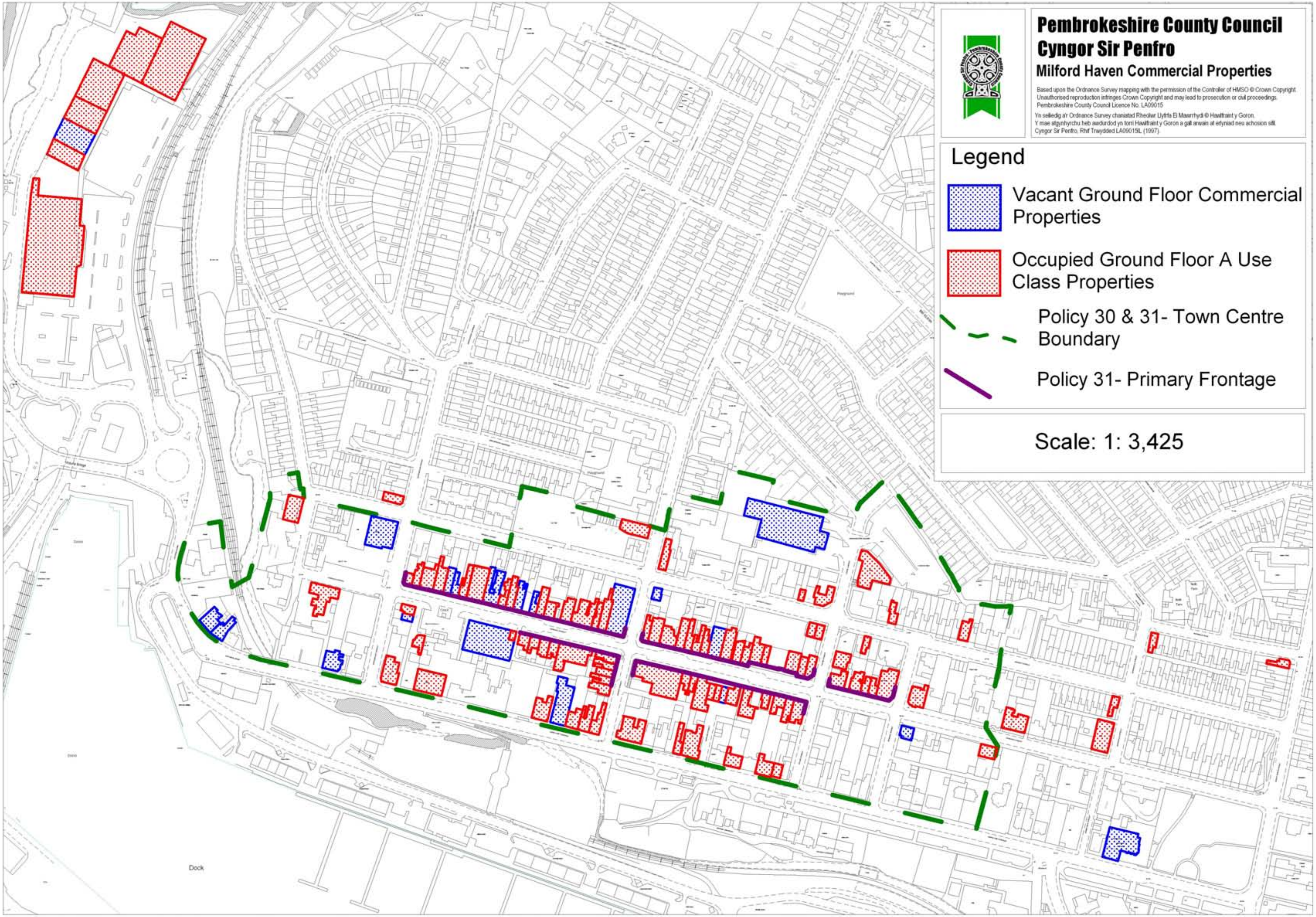
	Town centre (as currently defined by JUDP)		
	No. of units	**% of Total Occupied**	**Area (gross m² all floors)**
Total A Use Class	**104**		**15,162**
Total Convenience	10	9.9	1,190
Total Comparison	38	37.6	5,005
Total Services	53	52.5	8,567
Not Known	0	0	0
Total Occupied	**101**	**100.0**	**14,762**
Unoccupied	**3**		**400**

Source: **PCC Retail Survey 2007**

[5] Of the Use Classes Order – see Glossary for definitions

A list of all supermarkets in Pembrokeshire is included in Appendix 1.

Maps highlighting the location of ground floor occupied A use class premises and vacant properties are shown on the next page.



Pembrokeshire County Council
Cyngor Sir Penfro
Milford Haven Commercial Properties
Based upon the Ordnance Survey mapping with the permission of the Controller of HMSO © Crown Copyright. Unauthorised reproduction infringes Crown Copyright and may lead to prosecution or civil proceedings. Pembrokeshire County Council Licence No. LA09015
Yn seiliedig a'r Ordnance Survey chaniatad Rheolwr Llyfrfa Ei Mawrhydi © Hawlfraint y Goron. Y mae atgynhyrchu heb awdurdod yn torri Hawlfraint y Goron a gall arwain at erlyniad neu achosion sifil. Cyngor Sir Penfro. Rhif Trwydded LA09015IL (1997).
Legend
Vacant Ground Floor Commercial Properties
Occupied Ground Floor A Use Class Properties
Policy 30 & 31- Town Centre Boundary
Policy 31- Primary Frontage
Scale: 1: 3,425
Dock

Milford Haven Summary of CACI Footprint:

Resident potential - this is the potential available expenditure from the resident population within the Primary, Secondary and Tertiary Catchments which are shown on the map on the following page.

Total Population	Total Households	Total Market Potential (£1,000's)	Centre Expenditure Potential (£1,000)	Market Share	Spend per capita (£)
10,899	4,738	£43,363	£22,677	52.3%	2,080.68

Note: the Primary catchment is where 50% of the total catchment expenditure is achieved, the Secondary catchment is where 75% is achieved, the Tertiary where 90% is achieved and the Quaternary 100%.

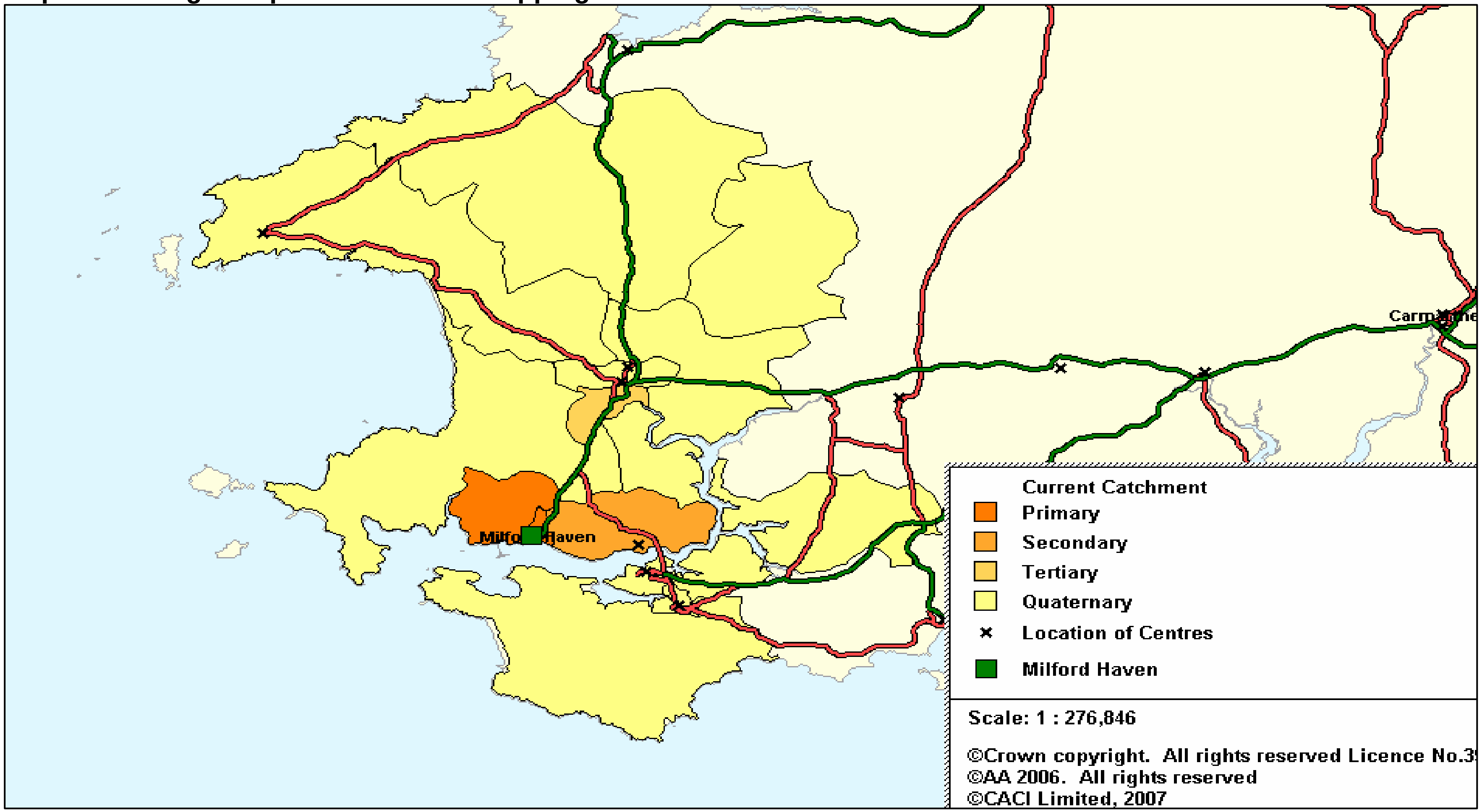
Resident Spend generated across all catchments

Resident Spend
£9,807,288

Leakage

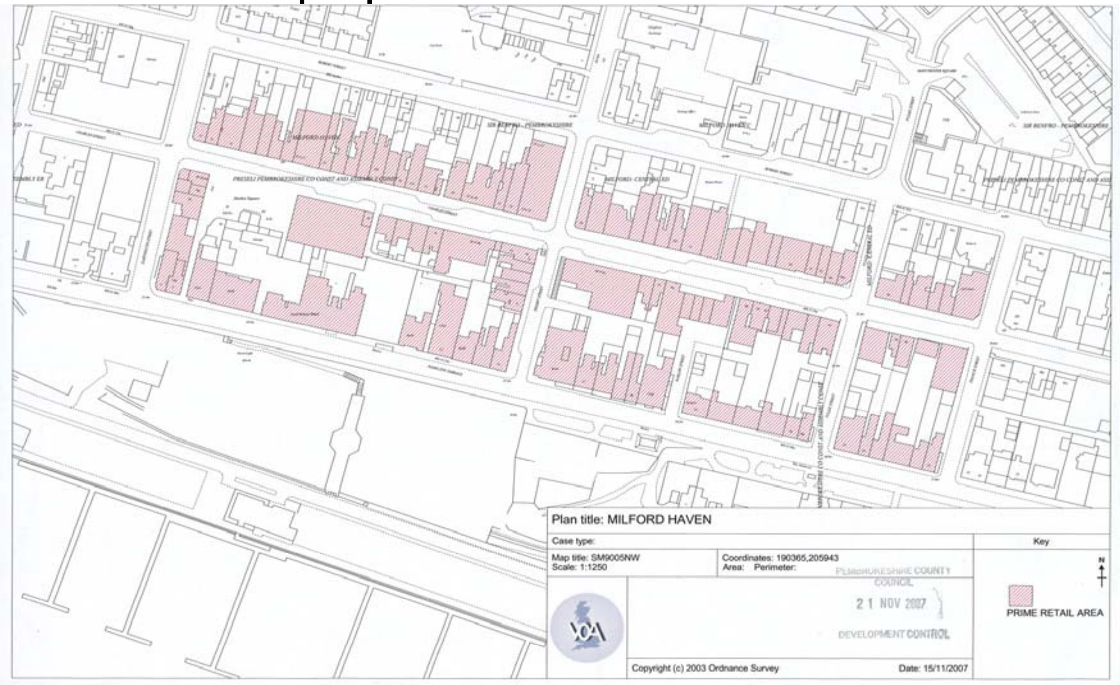
Milford Haven suffers because a large share of the population in its main catchment shop in Haverfordwest. It also loses 10% of its potential spend to Pembroke Dock.

Map illustrating Comparison Goods Shopping Catchment for Milford Haven

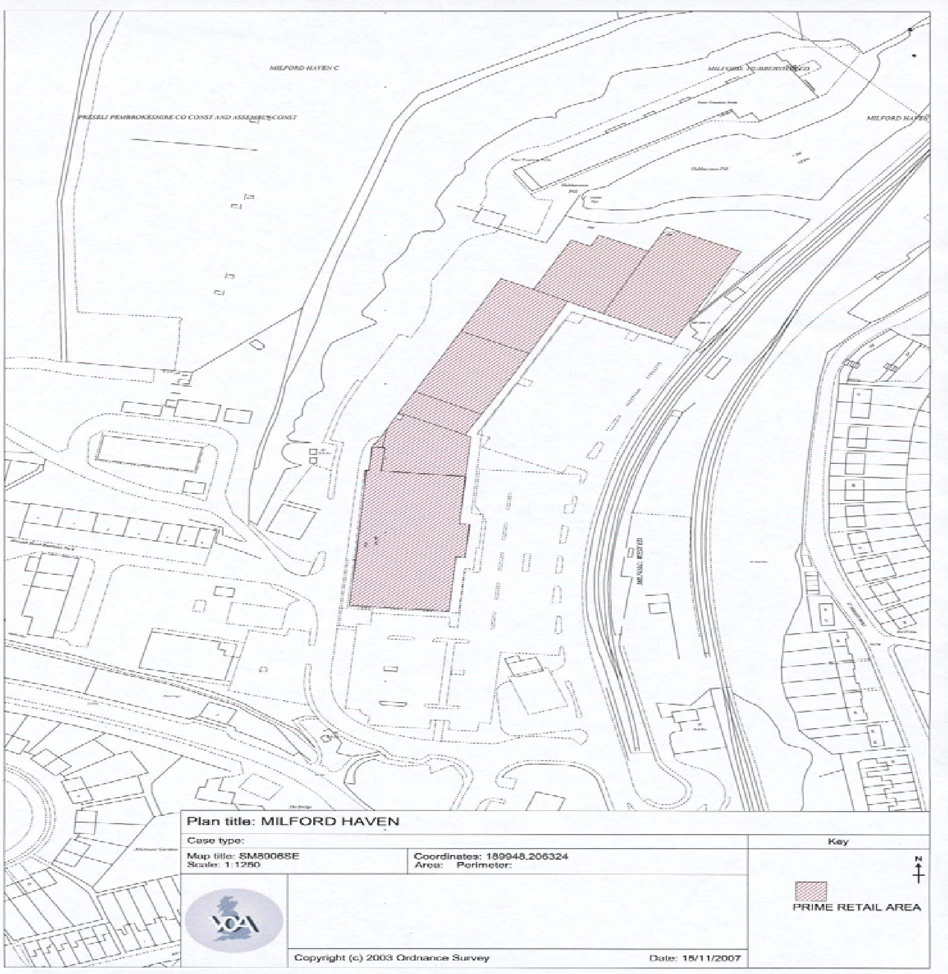


Source: **CACI Retail Footprint**

District Valuer's map of prime retail areas

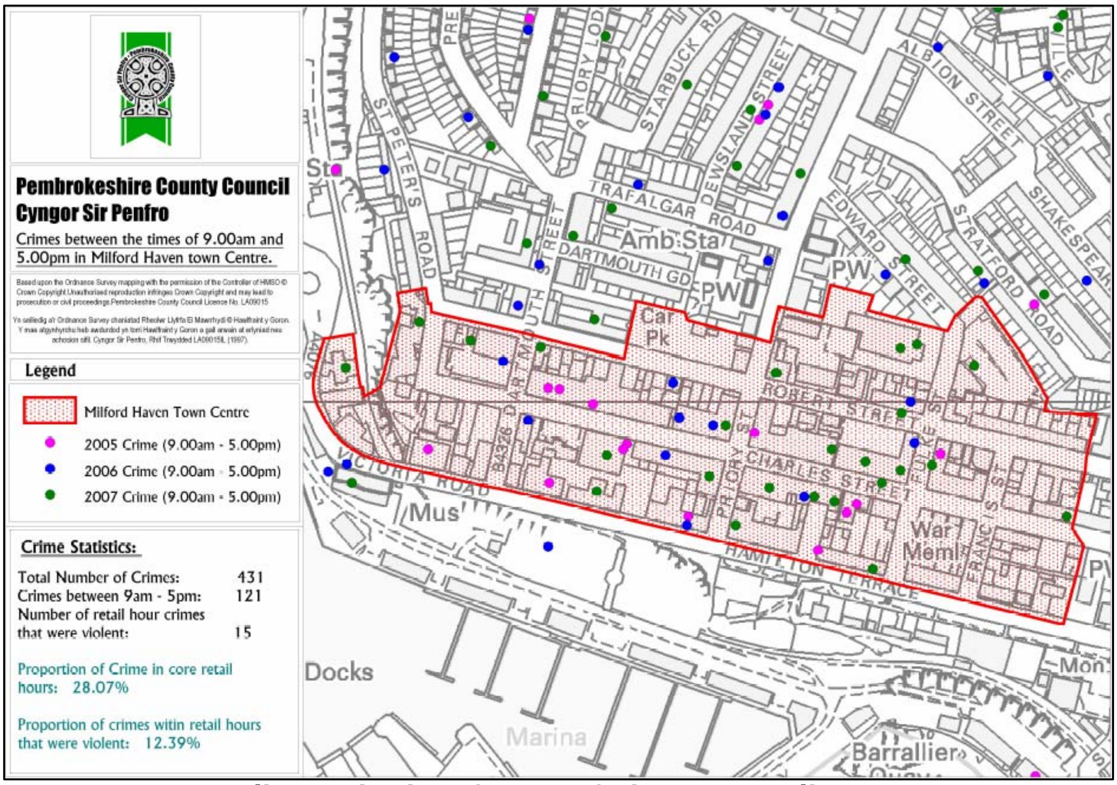


The prime retail areas identified by the Valuation Office are indicated as being along Charles Street and the North of Hamilton Terrace. The Haven Head Retail Park is also indicated as being a prime retail area.



Source**: District Valuer’s Office**

Incidence of town centre crime, April 2005 – December 2007



Source**: PCC Policy Unit, data from Dyfed Powys Police**

Recorded crime in Milford Haven is lower than Haverfordwest where there is a similar population but far bigger town centre. The proportion of crimes during retail hours (9am until 5 pm) that were violent is the second lowest in Pembrokeshire after Fishguard.

Perceptions of personal safety (Source: Wavehill Consulting 2007a)

Very good	10
Good	65
Average	35
Poor	5
Very poor	3
Don’t Know	2
Total	120

Results for Milford Haven are quite similar to Haverfordwest, with large numbers responding ‘good’ and ‘average’.

Views on Towns from Pembrokeshire Residents Survey 2007

In the Pembrokeshire Residents Survey 2007 (Wavehill Consulting 2007b) When asked which ONE town centre in Pembrokeshire do you visit most frequently to shop?

7% (the third greatest percentage following Haverfordwest and Pembroke Dock) listed Milford Haven as the single town centre that they most frequently shop at.

In an analysis of their views on Milford Haven when asked what would encourage residents to shop there more frequently, the following top five priorities were identified:

- **A better range of shops (score: 127)**
- **A more attractive environment (54)**
- **More space for car parking (39)**
- **Pedestrianisation (37)**
- **A better bus service to and from the town (32)**

Having a more attractive town centre environment is seen as a higher priority in Milford Haven, Fishguard and Pembroke Dock, being the second priority in these towns, but the third priority in overall analysis.

A summary of the analysis of all of the towns is included in Appendix 6.

Milford Haven Conclusions

Milford Haven has the second highest total A use class floorspace available across the settlement. It also has the second highest total comparison floorspace, although this is substantially lower than the offer available in Haverfordwest. Proportionally Milford Haven has high vacancy rates.

Milford Haven has two supermarkets, including a Tesco to which an application for an extension has recently been made (see Appendix 1).

Analysis from CACI suggests that Milford Haven because it is only 8 miles from Haverfordwest loses trade to the County Town. Milford Haven has a much lower total spend than might be expected given the floorspace available within the centre – an indication of its current underperformance as a centre.

The resident shopper population within Milford Haven is less affluent than that for other towns (see Appendices 4 and 5).

Milford Haven is currently underperforming as a centre. There are poor connections between the traditional town centre in the area around Charles Street and Robert Street and the recent Marina developments. Residents who shop in Milford Haven listed a desire for a more attractive environment as their 2nd priority, indicating that this is a higher priority for shoppers in Milford Haven than generally (over all Pembrokeshire Town Centres this was the third priority).

The focus of the LDP therefore will be on encouraging the upgrading and renewal of the traditional core of the town centre, potentially decreasing the area defined as Town Centre in order to consolidate the Town's position as a local service centre which can maximise its commercial and leisure opportunities. Shrinking the area of the Town Centre with shops into a smaller area would release land and shops for housing in the outer areas of the current core. Better connections between the traditional Town Centre and the area around the marina will also be encouraged.

The Dyfed Powys Police data indicates low levels of crime during traditional retail hour crimes (9am -5 pm). Wavehill Consulting's Survey (2007) indicated that most people surveyed (62%) felt that their perception of personal safety whilst in the town was Good or Very Good.

Overall conclusions are that Milford Haven whilst potentially the second centre within a retail hierarchy of the County is currently underperforming with high vacancy rates and a lower level of spend in the town than might be expected. Its close proximity to Haverfordwest and the larger retail offer available there means that there is a lot of leakage to this centre, this is unlikely to change. The LDP should seek to consolidate the position of Milford Haven as a local service centre, and location for leisure encouraging renewal of the built environment and potentially reducing the area of the town designated as town centre

to reduce vacancy rates and allow conversion to other uses such as residential.