4.3 Pembroke Dock

The Wales Spatial Plan's Update 2008 vision for Pembroke Dock is to develop this in conjunction with Pembroke, as the county's secondary retail and service centre serving the south of Pembrokeshire. Together Pembroke Dock and Pembroke have a combined total floorspace that is substantially higher than that of Milford Haven. Pembroke Dock has a substantial number of retail units in London Road which are adjacent to the traditional centre. Since the survey was conducted additional units have opened at London Road including Argos, Wilkinsons, Peacocks and Brantano. These are outside the centre defined within the JUDP and therefore these floorspace figures are not included in the Town Centre figures.

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

	Town Centre (as currently defined by JUDP)
	Area gross m² all floors
Class A[6]	**13,394**
Class B	6,138
Class C	6,284
Class D	1,893
Sui Gen	142
Not Known / No info	1,437
Unoccupied	**4,471**

No of ground floor units unoccupied (all): 36

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	**93**		**14,060.4**
Total Convenience	4	4.8	2,698.1
Total Comparison	43	51.2	6,233.1
Total Services	34	40.5	4,148.6
Not Known	3	3.6	314.5
Total Occupied	**84**	**100.1[7]**	**13394.3**
Unoccupied	**9**		**666.1**

Source: PCC Retail Survey 2007

[6] Of the Use Classes Order
[7] Does not equal 100.0% due to rounding.

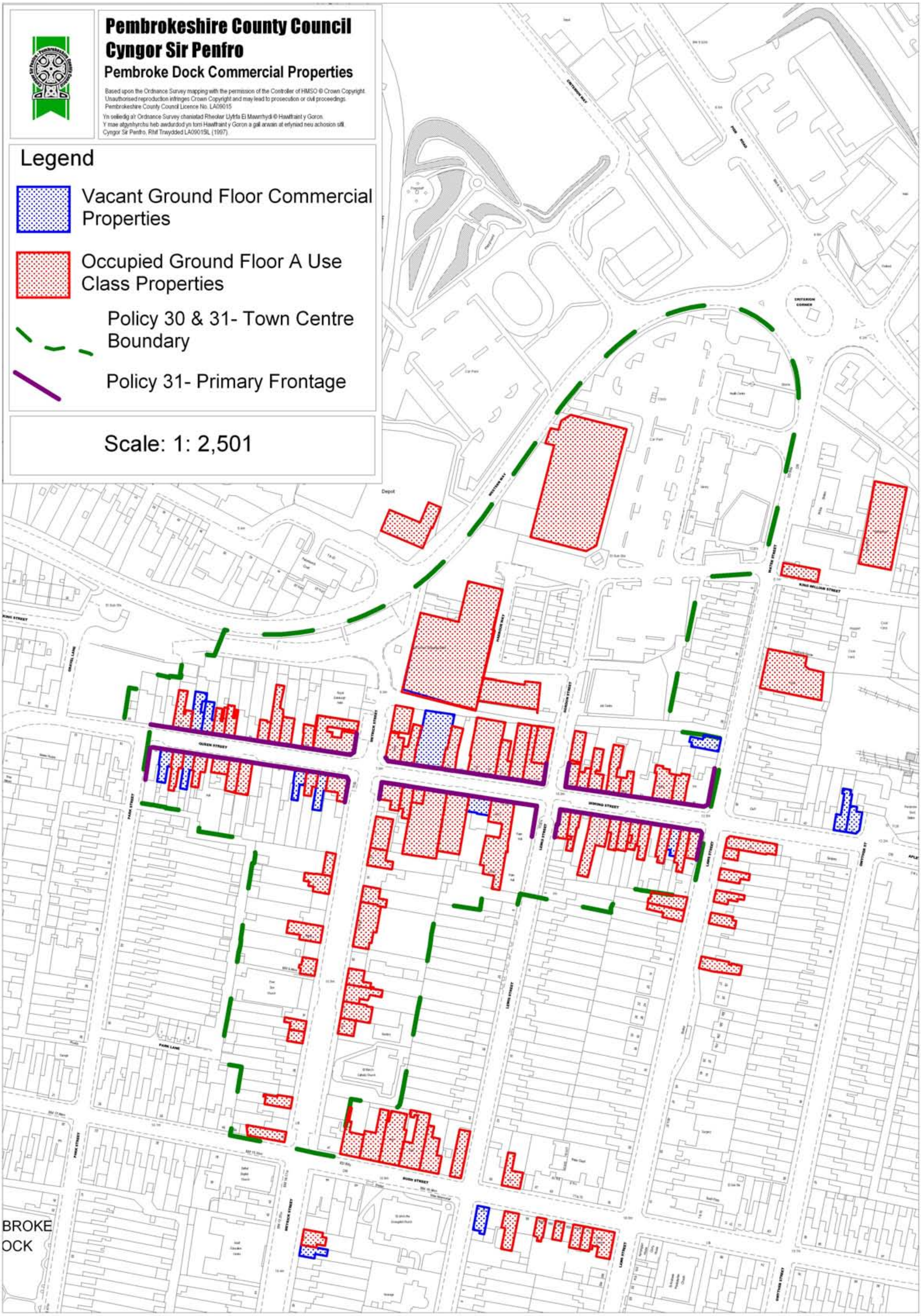
A list of all supermarkets in Pembrokeshire is included in Appendix 1. This includes floorspace figures for the Tesco and Asda in Pembroke Dock.

Additional floorspace in the London Road area (outside the existing centre):

London Road Outlets	**Floorspace (metres square gross)**
Argos	929
Brantano	604
Peacocks	510
Wilkinsons	580
McDonalds	350
Instore	2400
Focus/Do It All	3000
Total	8373

The area of London Road adjacent to Tesco, which is an edge of centre site developed as a result of being allocated as an Enterprise Zone in the early 1990s. A number of permissions were given on site, eventually resulting in the present situation where the site operates in effect as a bulky goods retail park for the wider Pembroke Dock area.

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



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Cyngor Sir Penfro
Pembroke Dock Commercial Properties
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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: 2,501
Depot
BROKE
OCK

Pembroke Dock Summary of CACI Footprint:

Resident potential - this is the potential spend available from the resident population who live 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 (£)
12,342	5,393	£58,302	£14,431	24.8%	2,053.92

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

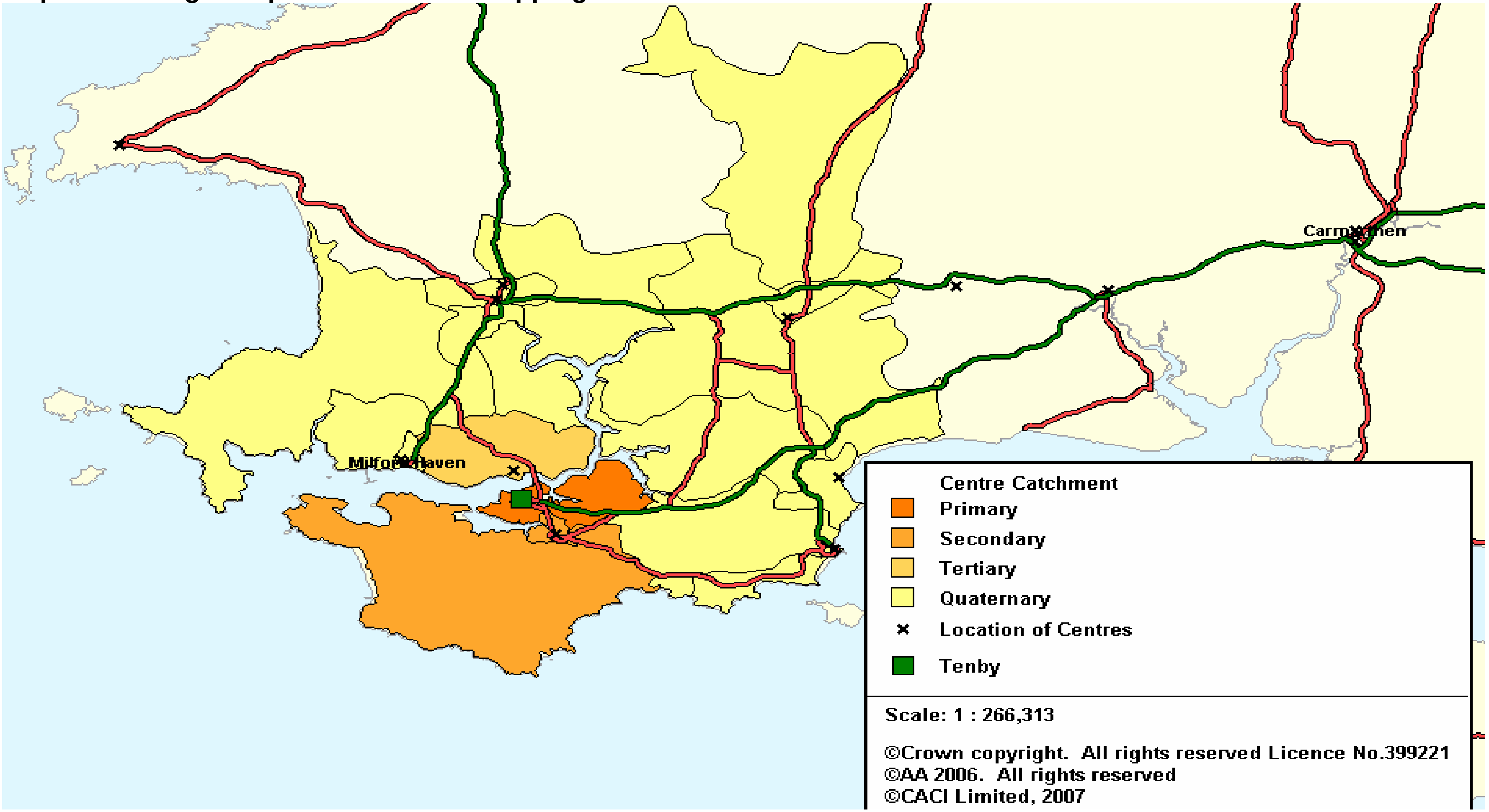
Resident Spend
£14,199,341

Pembroke Dock has relatively high centre expenditure.

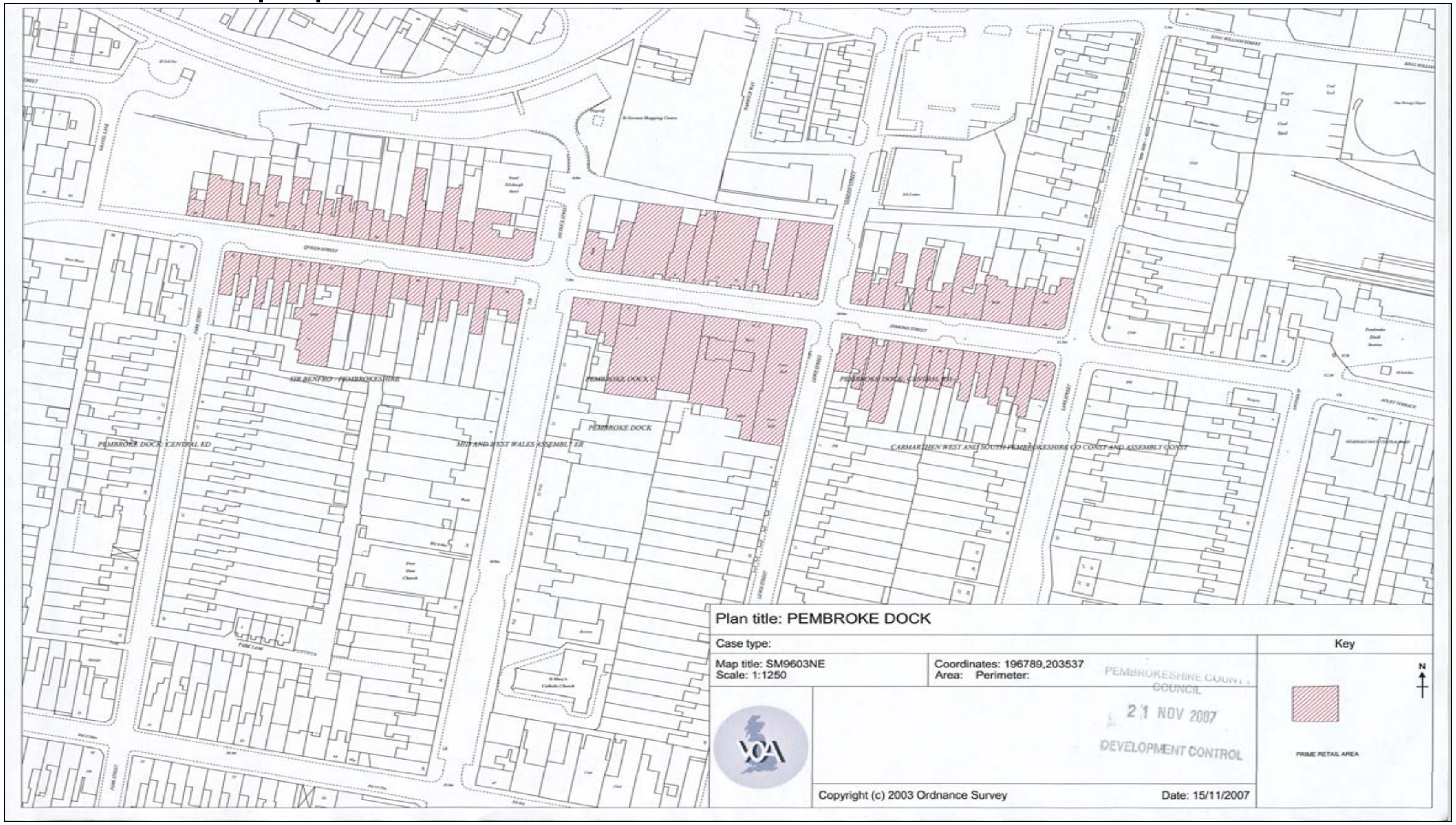
Leakage

Because of their closeness in proximity there is a lot of movement of shoppers between Pembroke and Pembroke Dock. Whilst Pembroke Dock is more dominant because of its greater size, 33.1% of its core market share goes to Pembroke. Haverfordwest draws approximately 6.3% from this area.

Map illustrating Comparison Goods Shopping Catchment for Pembroke Dock:



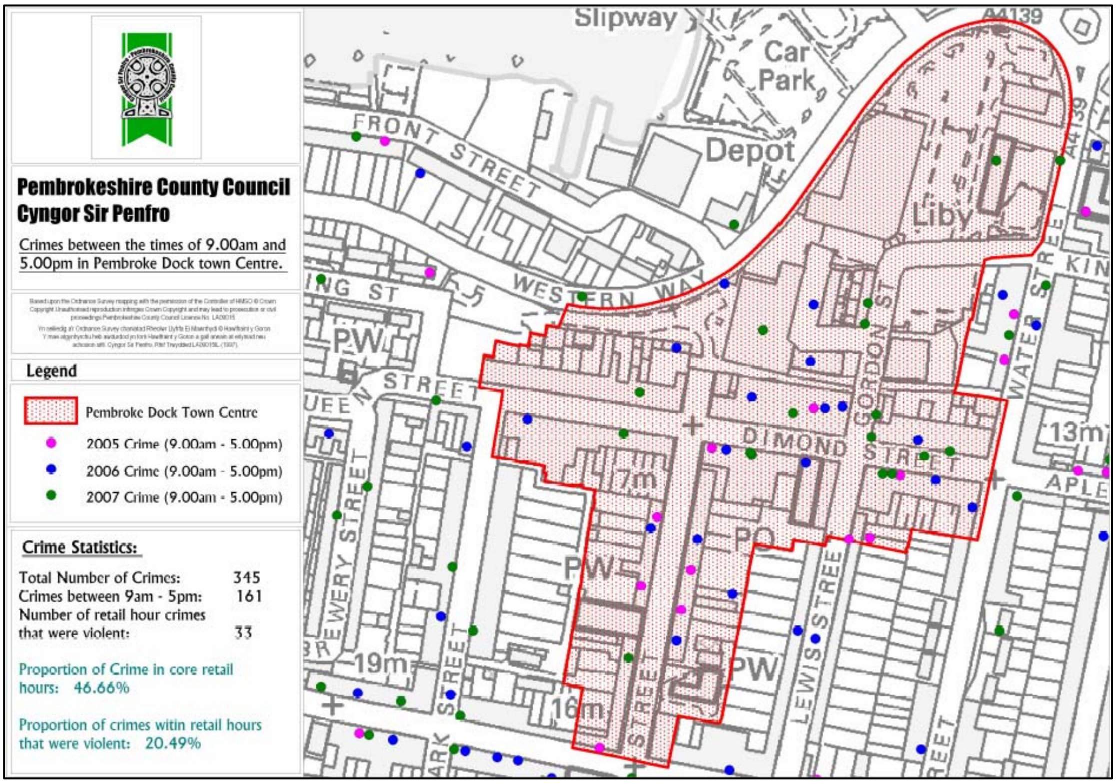
District Valuer's map of prime retail areas:



Source**: District Valuer's Office**

Note: Prime areas are identified as being along Dimond Street and Queen Street

Incidence of town centre crime, April 2005 – December 2007



The number of recorded crimes during all retail hours (9am to 5pm) in Pembroke Dock is low – fewer than Fishguard and Pembroke despite having a bigger population. The town centre in Pembroke Dock is different to many in Pembrokeshire in that there are few public houses located within it. This means that the area is relatively quiet outside retail hours and therefore the percentage of crimes occurring between 9.00am-5.00pm artificially appears very high. In total only 33 of the crimes occurred during retail hours over the 2005-2007 period were violent.

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

Very good	3
Good	37
Average	32
Poor	7
Very poor	1
Don't know	0
Total	80

The results are the weakest of all Pembrokeshire Towns Surveyed. However they should not be exaggerated because only 8 individuals considered their personal safety to be 'poor' or 'very poor'.

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?

13% (the second greatest percentage following Haverfordwest) listed Pembroke Dock as the single town centre that they most frequently shop at.

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

- **A better range of shops (score: 195)**
- **A more attractive environment (114)**
- **More space for car parking (84)**
- **Better on-street parking (67)**
- **A better bus service to and from the town (58)**

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

Pembroke Dock Conclusions

Pembroke Dock operates as an important local service provider for the south of Pembrokeshire.

Pembroke Dock has a greater comparison offer and lower catering offer (less café's/restaurants) than some other towns. It is in close proximity to Pembroke and there is a great deal of interaction between the two centres. (53.8% of the market share belonging to Pembroke Dock and 33.1% of the market share belonging to Pembroke).

The Wales Spatial Plan's ambition is for Pembroke and Pembroke Dock to function together to provide the county's secondary retail and service centre serving the south of the County.

Pembroke Dock currently has high vacancy rates within the area defined as Town Centre under the JUDP. Although indications of spend from CACI are reasonably strong, the number of unoccupied units in the town is a worrying indicator, however TAN 4 does stress that this indicator should be used with care.

Pembroke Dock has a less affluent resident shopper population than some other centres, with a large proportion of families on medium to low incomes (see Appendices 3 and 4).

Two major supermarkets serve the town (Asda and Tesco, the Tesco has a recently completed extension). Pembroke also has a small supermarket (see Appendix 1). These stores play an important role in serving the south of the County.

Large scale out of town centre developments have taken place at London Road (adjacent to the Tesco store) and the potential for better connections between this and the traditional town centre around Dimond Street needs to be examined. A focus of the LDP will be on renewing the area around Dimond Street.

The Dyfed Powys Police data indicates low levels of crime during traditional retail hour crimes (9am -5 pm). Wavehill Consulting's Survey (2007a) indicated that only 7 people from 80 felt that their perception of personal safety was poor.

Overall conclusions are that Pembroke Dock and Pembroke together can be seen as playing a key service and commercial role within the south of the County. As with other centres, the focus will be on renewing the traditional centre of Pembroke Dock and developing a policy framework which develops complementary roles between Pembroke Dock and Pembroke so that both the towns develop their individual strengths rather than competing with each other. Pembroke Dock can be seen as playing an important service and retail role with

Pembroke drawing on its strengths as a tourist centre with an attractive heritage offer.

4.4 Pembroke

The Wales Spatial Plan's vision for Pembroke, together with nearby Pembroke Dock, is to be the county's secondary retail and service centre, serving the south of Pembrokeshire.

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

	Town Centre (as currently defined by JUDP)
	Area gross m² all floors
Class A[8]	**14,044**
Class B	6,014
Class C	20,891
Class D	2642
Sui Gen	808
Not Known / No info	986
Unoccupied	**7,192**

No of ground floor units unoccupied (all): 19

A class units and floorspace

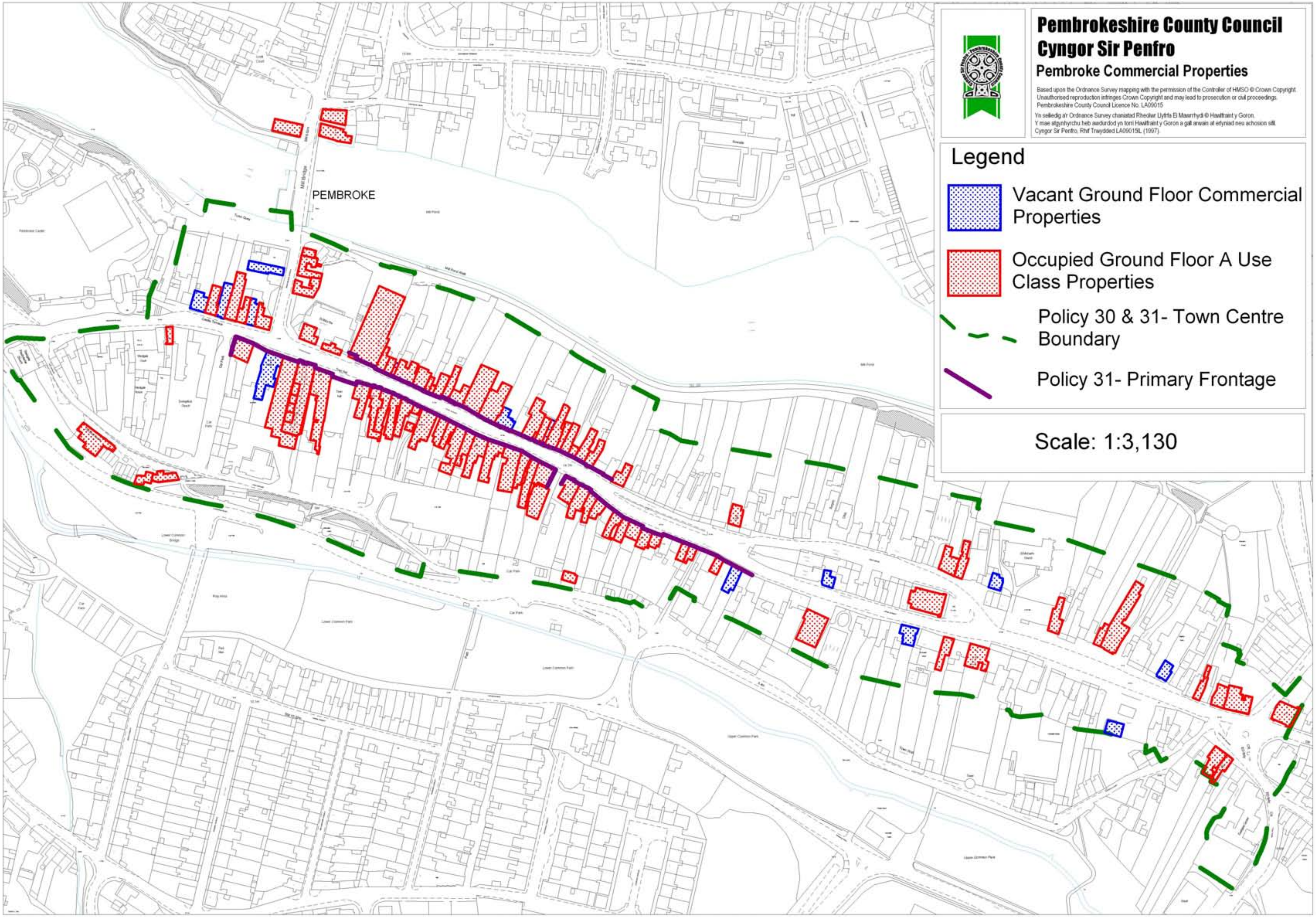
	Town centre (as currently defined by JUDP)		
	No. of units	**% of Total Occupied**	**Area (gross m² all floors)**
Total A Use Class	**102**		**14,472.9**
Total Convenience	7	7.1	1,419.3
Total Comparison	40	40.8	5,123.5
Total Services	50	51.0	7,393.3
Not Known	1	1.0	108.2
Total Occupied	**98**	**99.9**	
Unoccupied (formerly A class)	**4**		**428.6**

Source**: PCC Retail Survey 2007**

[8] 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.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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: 1:3,130
PEMBROKE
Mill Bridge

Pembroke Summary of CACI Footprint:

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

Total Population	Total Households	Total Market Potential (£1,000's)	Centre Expenditure Potential (£1,000)	Market Share	Spend per capita (£)
6,817	2,959	£58,302	£14,431	24.8%	£2,116.96

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:

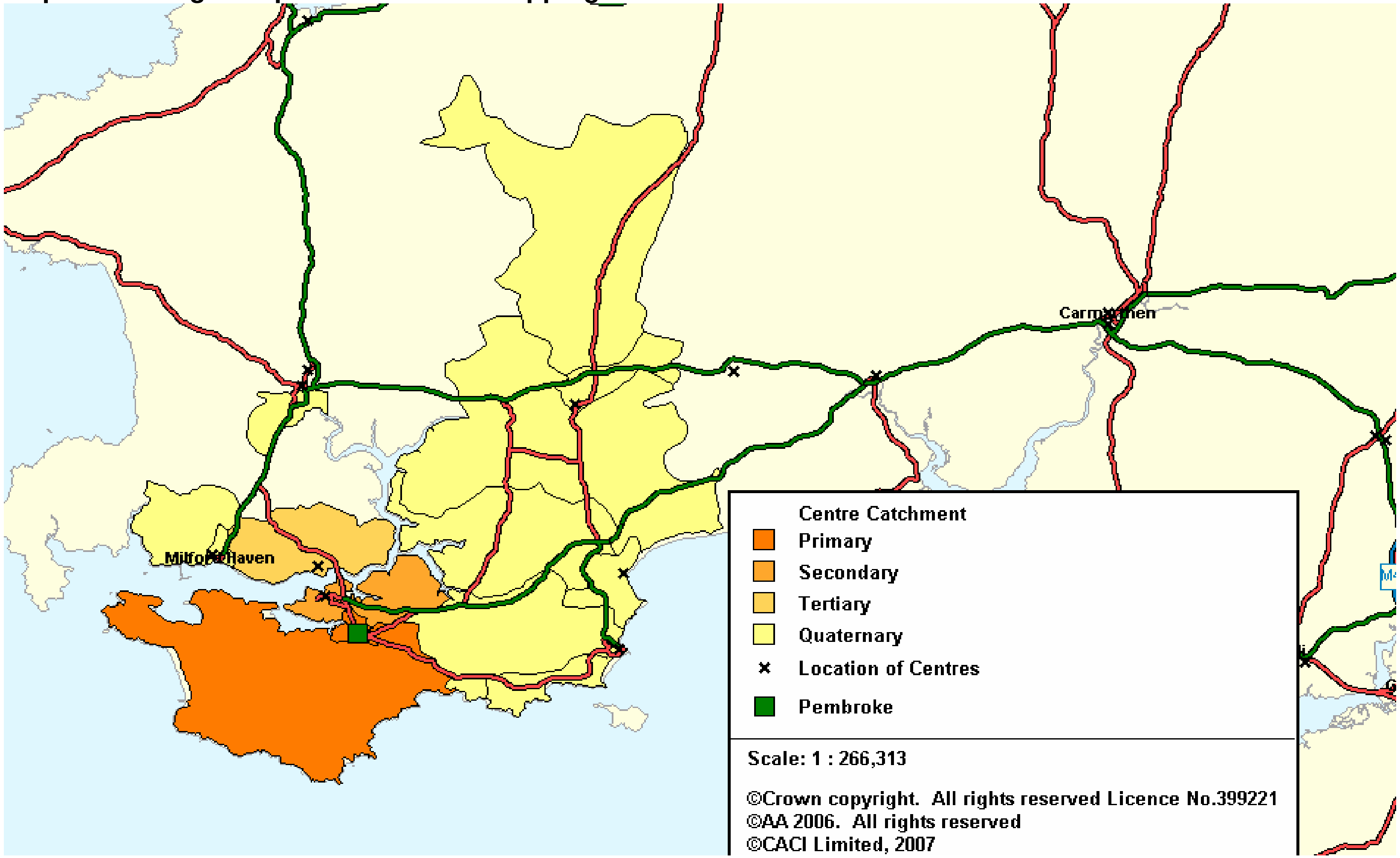
Resident Spend
£9,519,325

Pembroke has a population of less than 8,000 in its major catchment (the combined primary, secondary and tertiary catchments). This means that it has relatively low centre expenditure.

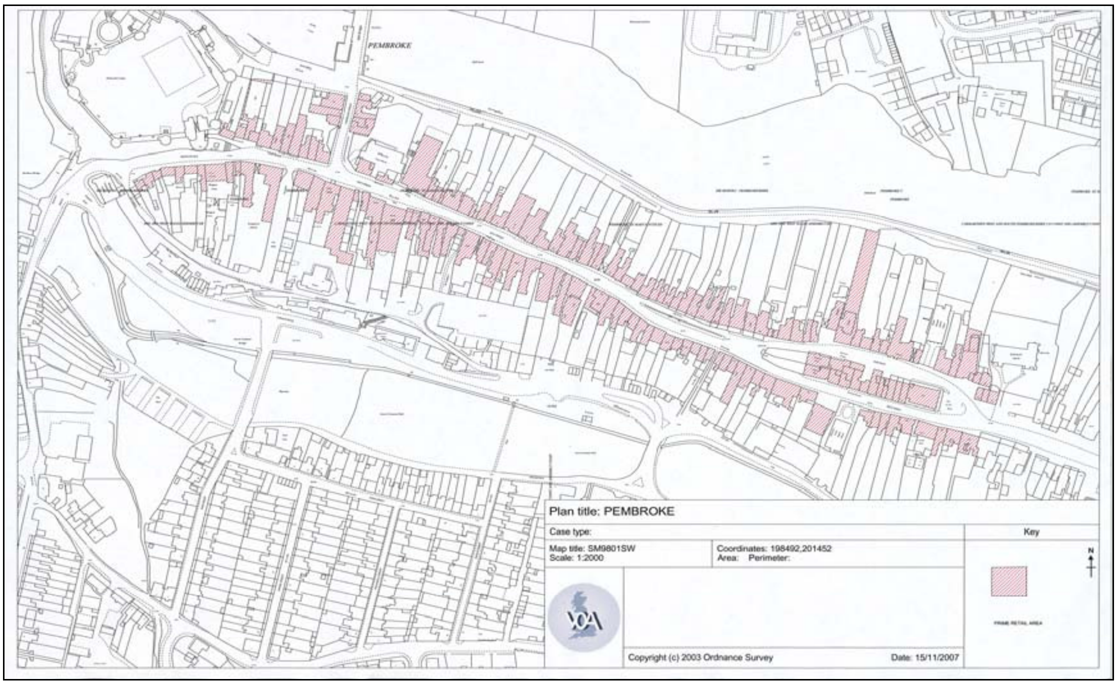
Leakage

There is a high flow of shoppers between Pembroke and Pembroke Dock. As a result Pembroke attracts 33.1% of its core catchment (primary and secondary catchments combined) with Pembroke Dock attracting 53.8% and Haverfordwest 6.3%.

Map illustrating Comparison Goods Shopping Catchment for Pembroke

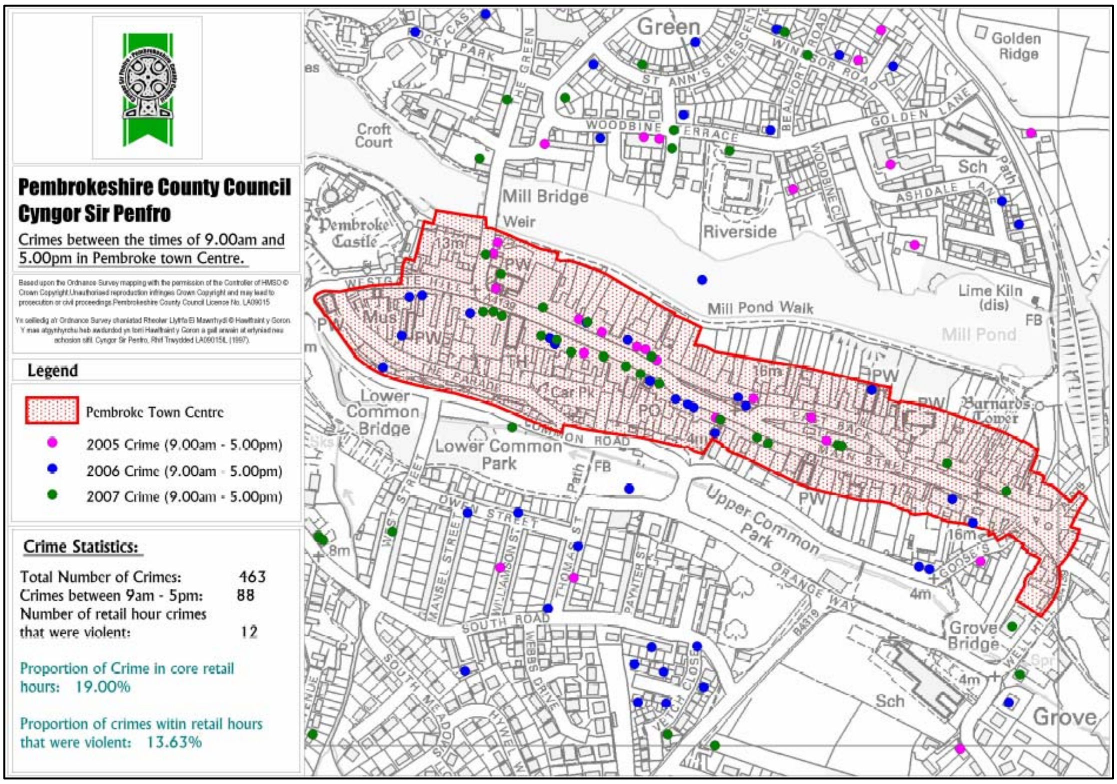


District Valuer's map of prime retail areas



The prime area is along Main Street and Westgate Hill.

Incidence of town centre crime, April 2005 – December 2007



A very low proportion of town centre crimes occurred during retail hours, probably because of the busy night scene in Pembroke town centre.

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

Very good	18
Good	101
Average	21
Poor	8
Very poor	1
Don't know	1
Total	150

Shoppers' perception of safety is good in Pembroke, with the large majority answering 'good' or better (79%).

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?

4% (the sixth greatest percentage following Haverfordwest, Pembroke Dock, Milford Haven, Tenby and Narberth) listed Pembroke as the single town centre that they most frequently shop at. The Wavehill analysis did not provide further breakdown on the specific priorities identified by shoppers for Pembroke. The overall priorities identified when all data from all town centres were amalgamated is included in Appendix 7.

Pembroke Conclusions

Pembroke combined with Pembroke Dock operates as an important local service centre for the south of Pembrokeshire.

Pembroke has a smaller catchment area (in terms of population) than Pembroke Dock for residential comparison shopping, as can be seen by comparing the two CACI catchment maps, most of their core catchments are however the same. As noted in the analysis for Pembroke Dock there is a great deal of interaction between the two centres. (53.8% of the market share belonging to Pembroke Dock and 33.1% of the market share belonging to Pembroke).

The Wales Spatial Plan's ambition is for Pembroke and Pembroke Dock to function together to provide the county's secondary retail and service centre serving the south of the County.

Pembroke has a reasonably affluent population reflecting the general trend of high numbers of Affluent Greys in Pembrokeshire (see Appendices 3 and 4). There is also a significant proportion of families on lower incomes.

Pembroke has the potential to be a niche market destination, drawing on its historic assets such as the Castle and attractive buildings along Main Street. I

The primary area for shopping in Pembroke is along Main Street (demonstrated in the PCC Retail Survey occupancy maps see Appendix 7). This is also reflected in the illustrative map from the District Valuer's Office. Policy options will seek to strengthen the existing provision along Main Street and upgrade the attractive historic built environment.

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 just fewer than 80% of people surveyed felt that their perception of personal safety was either good or very good whilst being in the town.

Overall conclusions are that Pembroke Dock and Pembroke together can be seen as playing a key service and commercial role within the south of the County. As with other centres, the focus will be on renewing the traditional centre of Pembroke along Main Street and developing a policy framework which develops complementary roles between Pembroke Dock and Pembroke. Pembroke Dock may serve a wider populations service and retail needs, with Pembroke operating as a niche centre building on its attractive historic environment and increasing its potential as a tourist destination.

4.5 Fishguard and Goodwick

Fishguard together with Goodwick, is one of the key retail and service centres for North Pembrokeshire. Cardigan as a larger market town also plays an important role. Economic development continues to rely on the port gateway to Ireland and a new marina development should aid the regeneration of the town.

Information on Goodwick has been included with the data from the PCC 2007 Survey, however other indicators were not available, Goodwick can be viewed as a local or district centre and will be considered in more detail in a separate analysis of these types of centres.

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

	Town Centre (as currently defined by JUDP)	**Goodwick**
	Area gross m² all floors	Area gross m² all floors
A Class	**12,774**	**1,646**
B Class	3,460	0
C Class	12,475	2,896
D Class	1,635	832
Sui Gen	685	0
Not Known / No info	335	87
Unoccupied	**3042**	**510**

No of ground floor units unoccupied in Fishguard Town Centre: 16
In Goodwick: 4

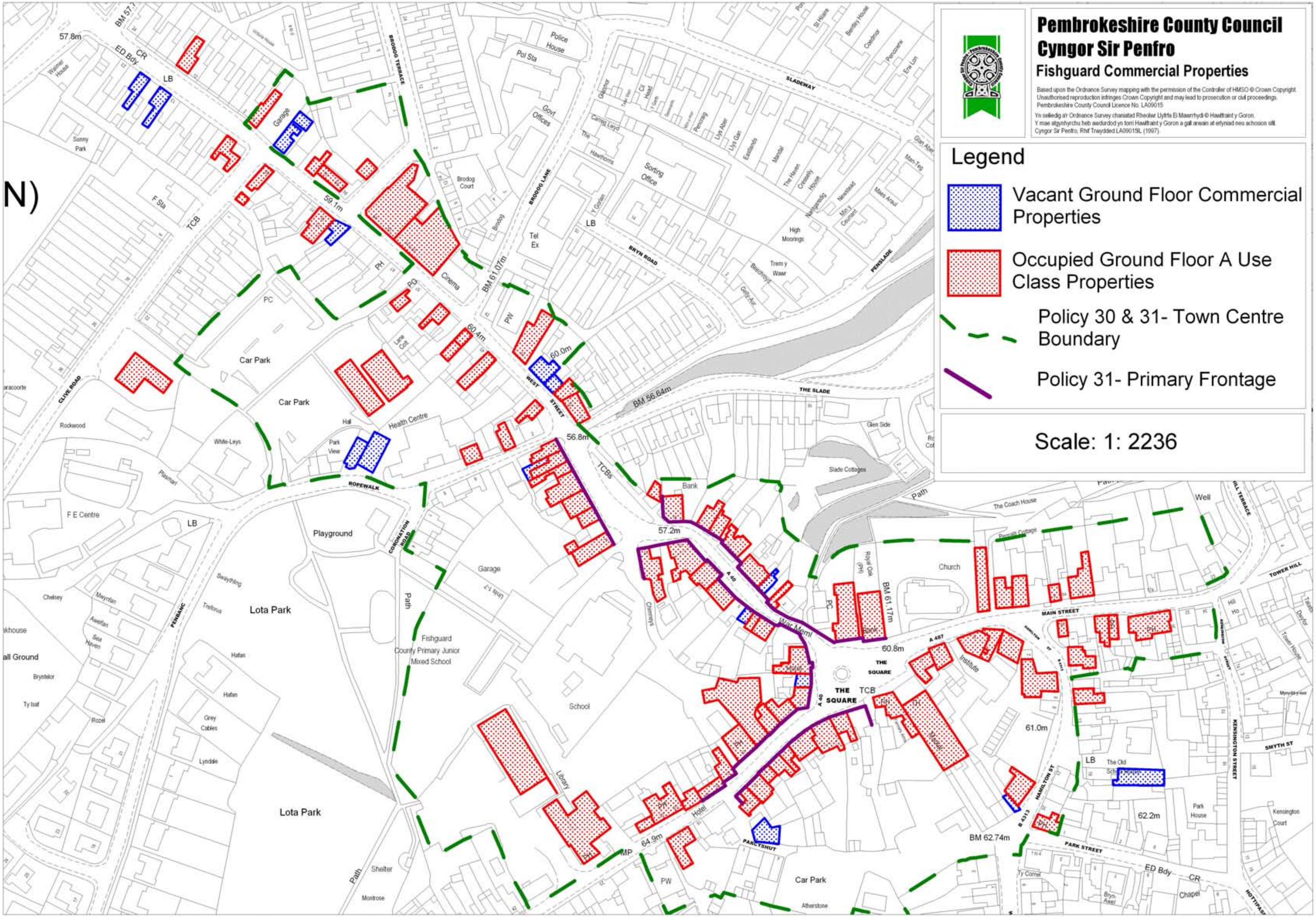
A class units and floorspace

	Town centre (as currently defined by JUDP)			**Goodwick**	
	No. of units	**% of Total Occupied**	**Area (gross m²)**	**No. of units**	**Area (gross m² all floors)**
Total A Use Class	**100**		**13,014**	**14**	**1,646**
Total Convenience	11	11.2	2,474	3	419
Total Comparison	37	37.8	4,811	1	135.6
Total Services	50	51	5,489	10	1,091

Total Occupied	**98**	**100**	**12774**	**14**	**1645.6**
Unoccupied (formerly A class)	**2**		**240**	**0**	**0**

Source: PCC Retail Survey 2007
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.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Fishguard Commercial Properties
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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: 2236
N)
West Street
Main Street
The Square
The Slade
Ropewalk
Lota Park
Car Park
Playground
Fishguard County Primary Junior Mixed School
Health Centre
Church
Library
Sorting Office
Kensington Street
Park Street
Hamilton St
Brodog Lane
Brodog Terrace
Bryn Road
Clive Road
Penslade
Tower Hill
Smyth St
Coronation Road
Penbanc
Sladeway

Fishguard Summary of CACI Footprint:

Resident potential - this is the potential expenditure available from shopper's resident 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 (£)
7,795	3,512	£32,060	£17,136	53.4%	2,198.21

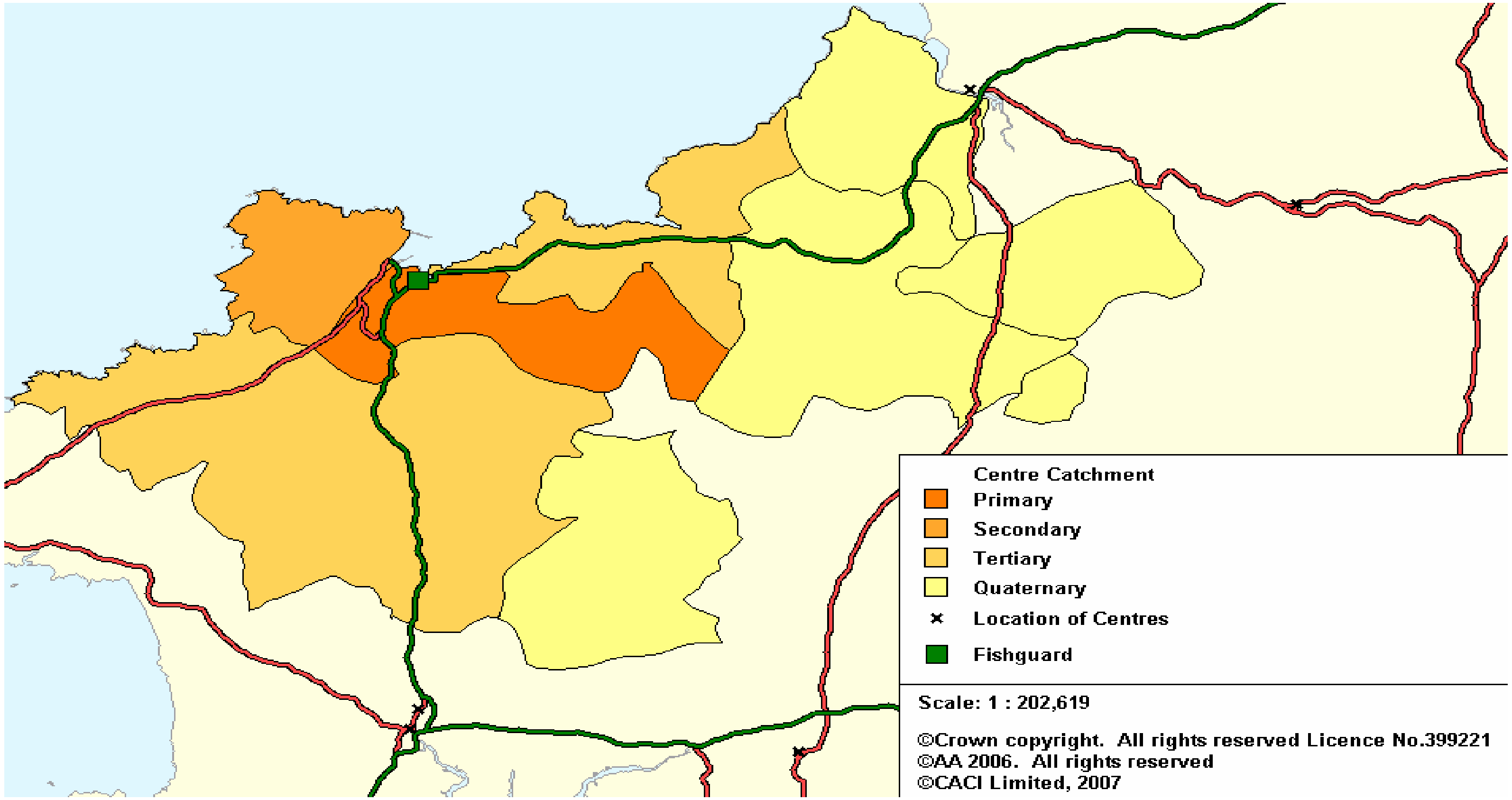
Note: the Primary catchment is where 50% of the total catchment expenditure is achieved, the Secondary catchment is where 75% is achieved, the Tertiary where 90% is achieved and the Quaternary 100%.

Resident Spend generated in the entire catchment:

Resident Spend
£8,738,909

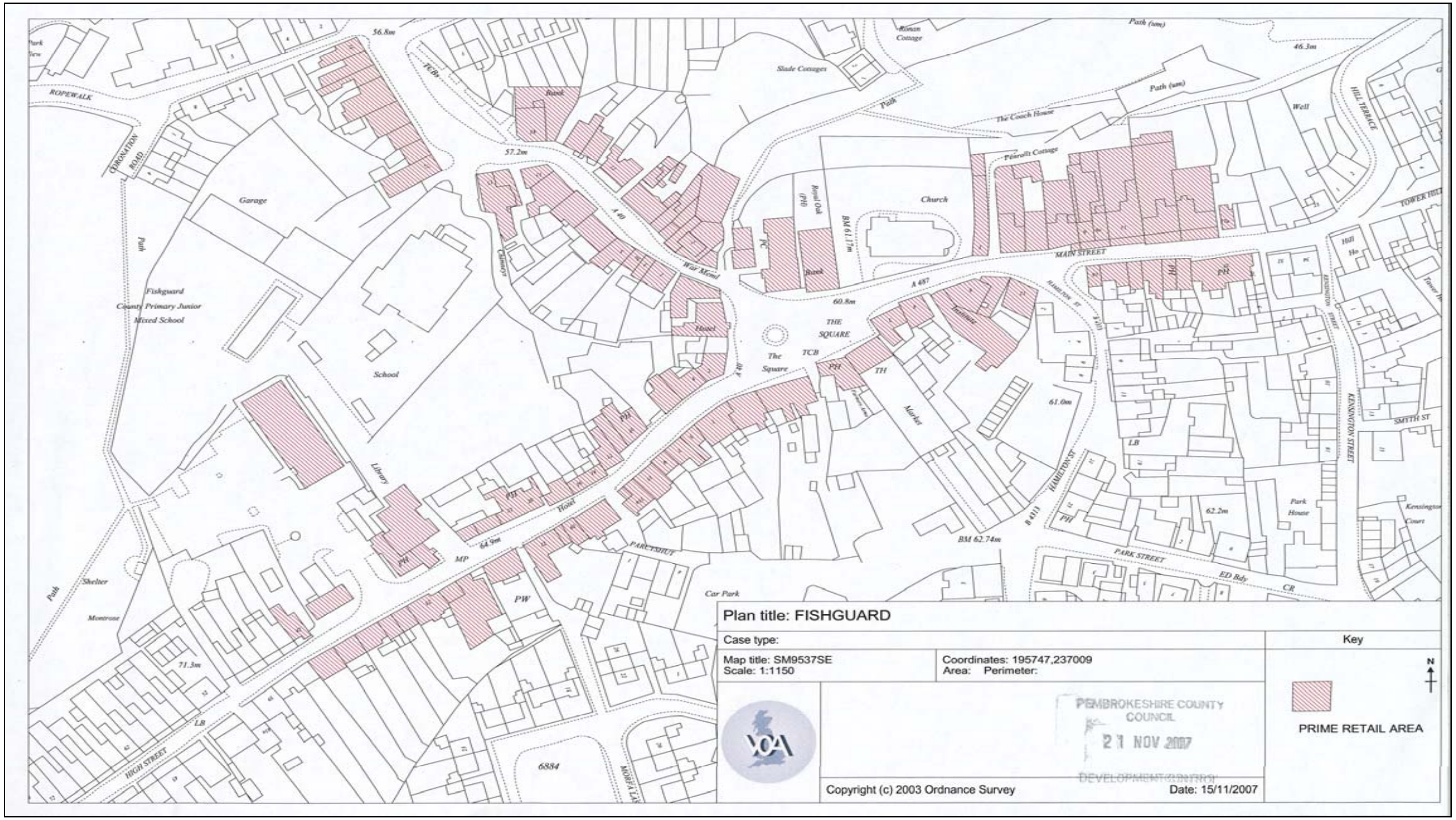
Fishguard as with Pembroke has fewer than 8,000 people in its major catchment and therefore a relatively low centre expenditure.

Map illustrating Comparison Goods Shopping Catchment for Fishguard:

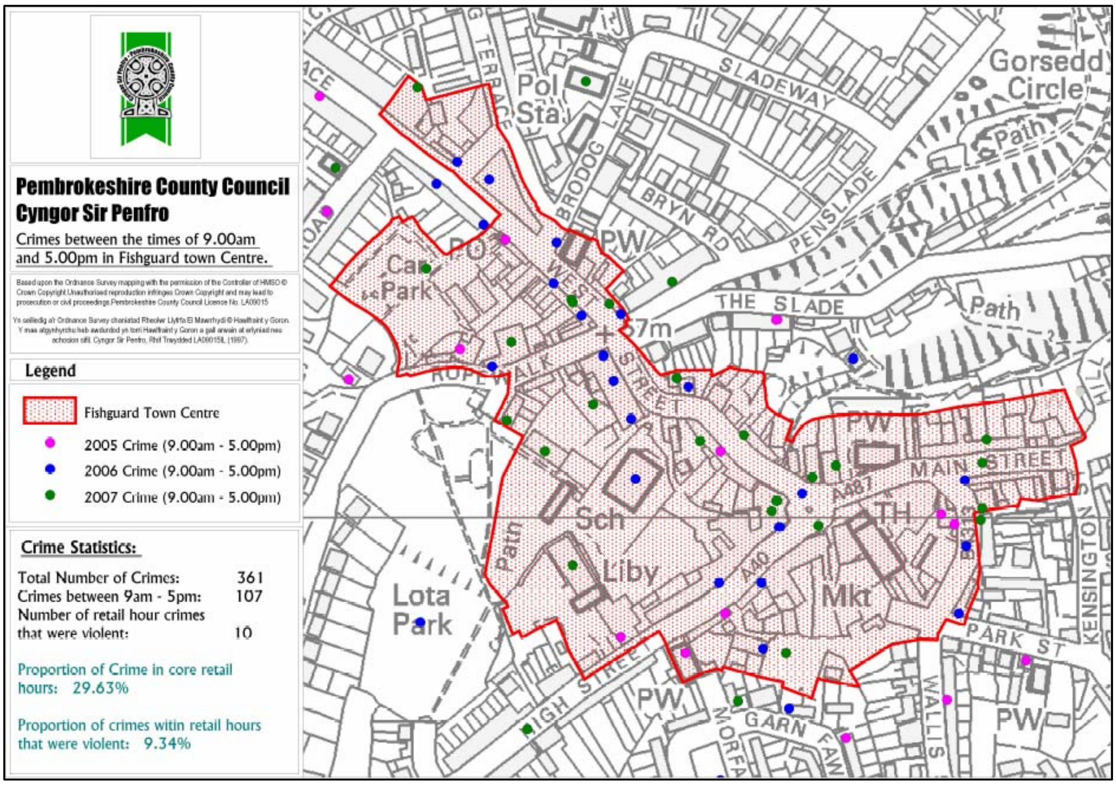


Source: **CACI Retail Footprint**

District Valuer's map of prime retail areas



Source: District Valuer's Office 2007
Prime area indicated as being around the High Street, Main Street and The Square.



Very few of the crimes recorded in Fishguard were classed as violent. These were dispersed across different locations within the centre.

Perceptions of personal safety

Very good	11
Good	62
Average	25
Poor	2
Very poor	0
Don't know	0
Total	100

These figures paint a picture of a very safe town centre where people shop with little fear of crime. The crime figures, above support and confirm shoppers' perceptions of Fishguard.

Views on Towns from Pembrokeshire Residents Survey 2007

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

Fishguard was not specifically identified by a significant percentage and was classified under the 3% which identified “Other”.

The top five priorities for users of Fishguard Town centre were the following:

- A better range of shops (score: 125)
- A more attractive environment (74)
- More space for car parking (59)
- Pedestrianisation (49)
- A better bus service to and from the town (39)

Having a more attractive town centre environment is seen as a higher priority in Pembroke Dock, Milford Haven and Fishguard, being the second priority in these towns, but the third priority in overall analysis when the survey data from all towns was amalgamated. Pedestrianisation was also a higher priority in Fishguard (fourth) than in the overall analysis (sixth) (amalgamated data from all towns is shown in Appendix 6).

Fishguard and Goodwick Conclusions

Fishguard and Goodwick have been identified by the Wales Spatial Plan Update 2008 as being important drivers of the regeneration of North Pembrokeshire. Fishguard combined with Goodwick has a similar amount of A use class floor space as Pembroke.

Fishguard along with Pembroke and Narberth has a shopper population of less than 8,000 within its major catchment (primary, secondary and tertiary catchments demonstrated on the CACI map). This means that it has relatively low centre expenditure. Fishguard does achieve over 70% of its core catchment (primary and secondary catchments demonstrated on the CACI map).

The resident shopper population is affluent with a large proportion of older and more affluent shoppers (see Appendices 3 and 4).

Increasing the range of shops available and the attractiveness of the environment were seen as priorities by residents.

The traditional shopping centre within Fishguard is based around The Square, along the A40, Main Street and High Street. This is still reflected in the illustrative maps provided by the District Valuer's Office which identify this as being the prime retail area (the area of highest Zone A values). The area of West Street moving away from The Square is of comparatively lower value, although this area was previously included in the area identified as town centre in the JUDP. Policy options will need to consider whether or not to use Town Centre boundaries and what form these might take. The focus will be on renewing the traditional Town Centre of Fishguard and looking at policy options for strengthening the retail offer of the town.

Conclusions: Fishguard together with the more limited offer of Goodwick will continue to play an important role in regenerating the North of the County. Future policy options will concentrate on renewing the traditional town centre of Fishguard and considering whether or not there is a need to define Goodwick as a separate local centre.

4.6 Narberth

Narberth is a small-medium retail centre with an important tourist function. It is arguably Pembrokeshire's best current example of a sustainable town centre, with a wide variety of shops. The Wales Spatial Plan 2008 Update identifies it as a medium sized centre with a niche retail offer which is currently a good example of a rural centre which is regenerating its local areas.

Floorspace figures

Occupied retail floorspace (gross m²) by use class

	Town Centre
	Area (gross m² all floors)
A Class	**7,805**
B Class	1,301
C Class	6,386
D Class	1,847
Sui Gen	46
Not Known / No info	212
Unoccupied	**1,629**

No of ground floor units unoccupied (all): 5

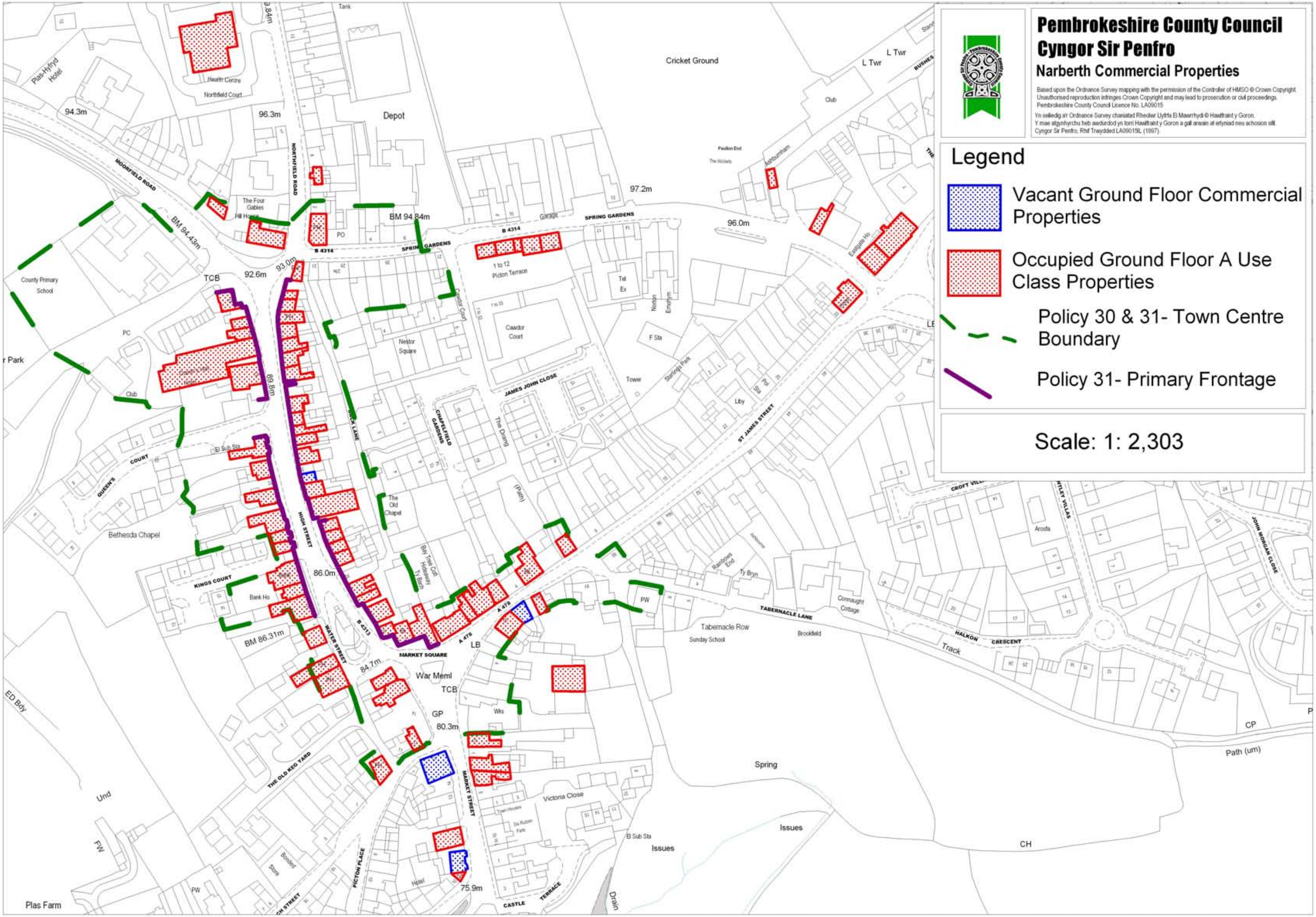
A class units and floorspace

	Town centre		
	No. of units	**% of Total Occupied**	**Area (gross m² all floors)**
Total A Use Class	**64**		**7,805.4**
Total Convenience	6	9.4	1,006.1
Total Comparison	23	35.9	3,094.1
Total Services	35	54.7	3,705.2
Total Occupied	**64**	**100.0**	**7805.4**
Unoccupied (formerly A class)	**0**		**0**

Source**: PCC Retail Survey 2007**

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.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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: 2,303
Cricket Ground
Depot
Moorfield Road
Northfield Road
Spring Gardens
B 4314
High Street
Market Square
Market Street
Water Street
St James Street
Tabernacle Lane
Back Lane
James John Close
Chapelfield Gardens
Kings Court
Queen's Court
The Old Keg Yard
Picton Place
Castle Terrace
Halkon Crescent
Cawdor Court
Nestor Square
Picton Terrace
Bethesda Chapel
County Primary School
Plas-Hyfryd Hotel
Tabernacle Row
Sunday School
Victoria Close
War Meml
Spring
Issues
Plas Farm
Track
Path (um)

Resident potential (this is potential expenditure available from the resident population within the Primary, Secondary and Tertiary Catchments)

Total Population	Total Households	Total Market Potential (£1,000's)	Centre Expenditure Potential (£1,000)	Market Share	Spend per capita (£)
6,532	2,841	£42,489	£14,746	34.7%	2,257.73

Resident Spend generated within entire catchment:

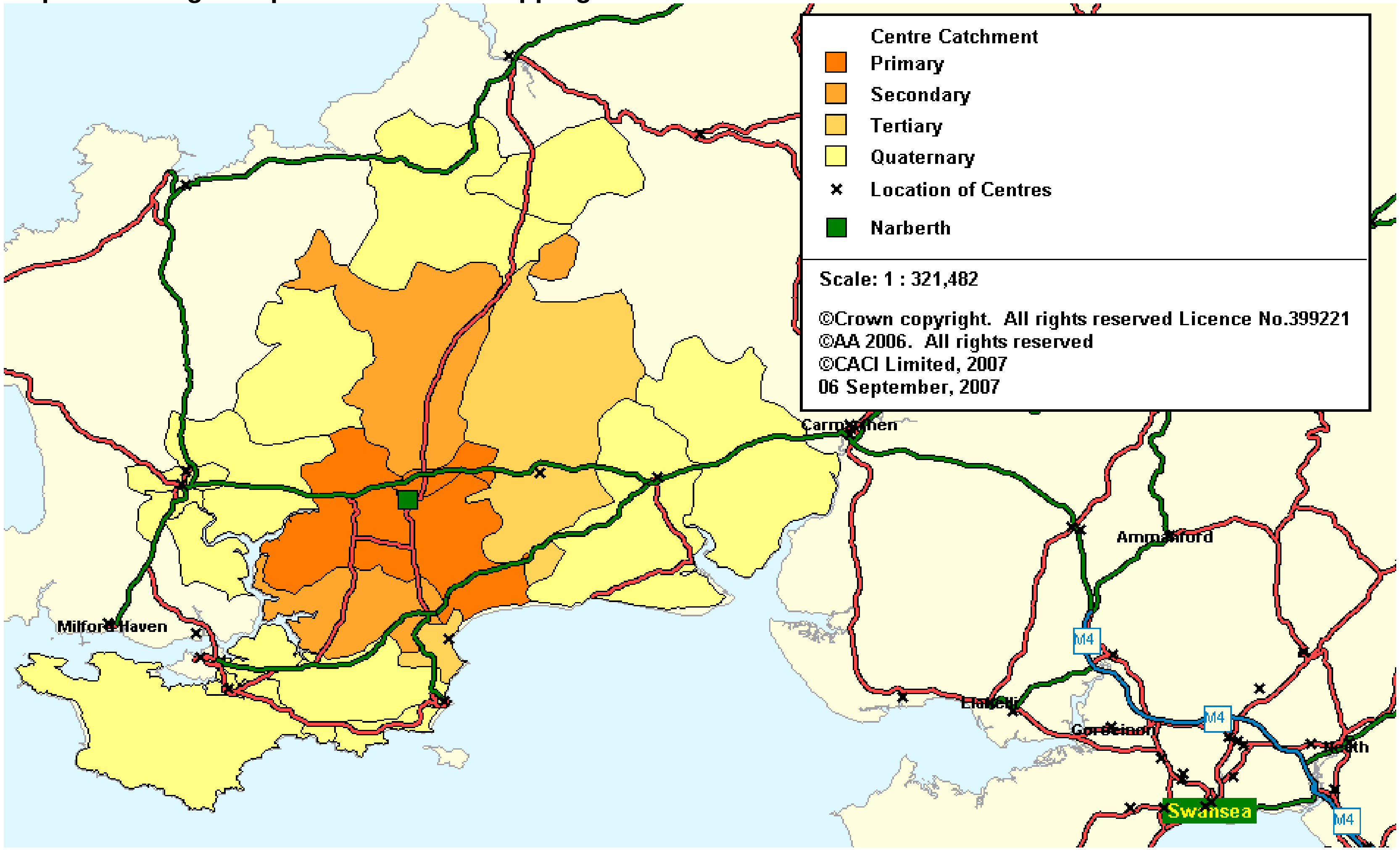
Resident Spend
£8,860,462

Narberth has a low centre expenditure due to its low resident shopper population.

Leakage

Narberth loses 22.8% of its potential core market to Haverfordwest and a further 14.8% to Carmarthen.

Map illustrating Comparison Goods Shopping Catchment for Narberth:

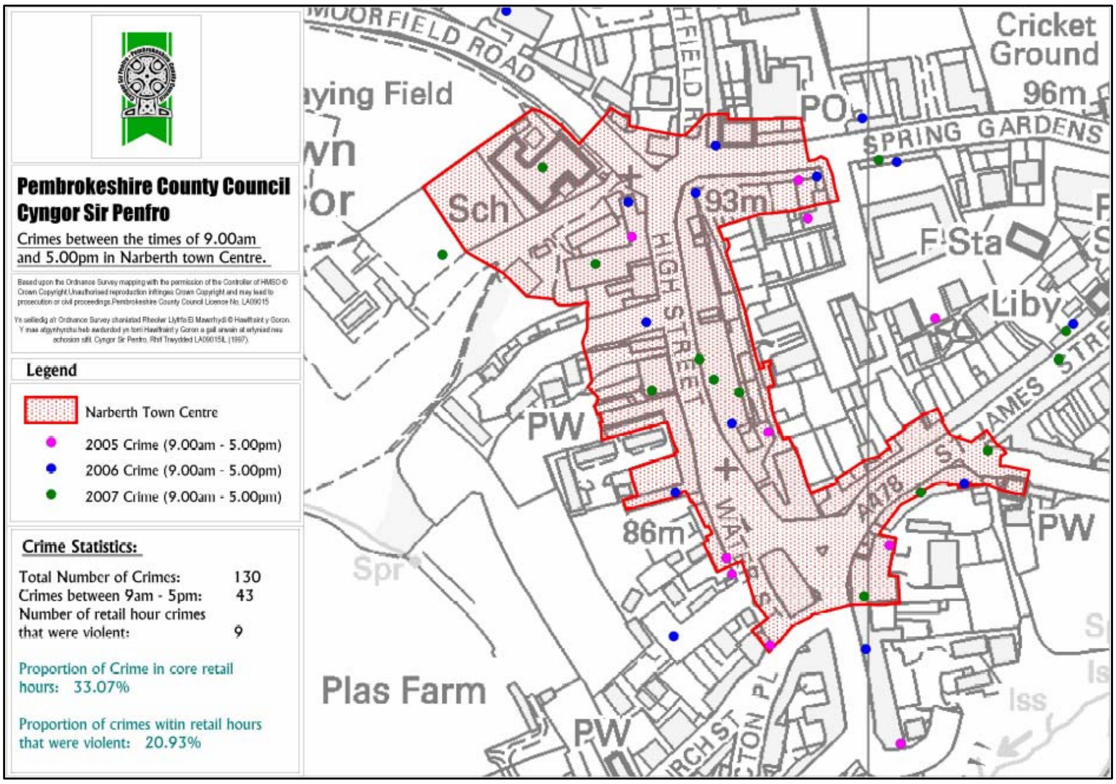


Source: **CACI Retail Footprint 2007**

District Valuer's map of prime retail areas

Source: **District Valuer's Office 2007**

Incidence of town centre crime, April 2005 – December 2007



Crime in Narberth is very low. Percentages are misleading because they fail to reflect that violent crime is very rare: 9 crimes = 21% of all crimes

Perceptions of personal safety (Wavehill Consulting Survey 2007a)

Very good	38
Good	50
Average	8
Poor	2
Very poor	0
Don’t know	2
Total	100

Similarly to Fishguard, shoppers in Narberth are aware that the retail area is a safe place with historically low levels of crime

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?

6% (the fifth greatest percentage following Haverfordwest, Pembroke Dock, Milford Haven and Tenby) listed Narberth as the single town centre that they most frequently shop at.

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

- **More space for car parking (score: 55)**
- **Better on-street parking (74)**
- **A better range of shops (29)**
- **Pedestrianisation (28)**
- **A better bus service to and from the town (27)**

A better range of shops was a much lower priority (third) in Narberth than in every other centre (first), demonstrating the high range of comparison shops available in Narberth. Instead having more space for parking was seen as the number one priority by respondents who used Narberth as their most frequent centre.

Narberth Conclusions

The Wales Spatial Plan 2008 Update asserts that Narberth is an excellent example of a centre which is successfully regenerating the area around it. The aspiration for Narberth in the Pembrokeshire Regeneration Masterplan 2008-2013 is to encourage strong and sustainable local economic development in the centre.

Indicators from the PCC Retail Survey 2007 demonstrate a vibrant town centre based along the High Street and Market Square.

The resident shopper population is the most generally affluent of any town in Pembrokeshire (see Appendices 4 and 5).

Narberth's position being in a central location in Pembrokeshire means that it potentially attracts visitors from a broad geographical area (see CACI Catchment Map). Although its position between Haverfordwest to the West and Carmarthen to the East means that it cannot compete in scale with these centres, it has successfully developed as a niche shopping area and the LDP will seek to develop policies which will encourage and protect this development. Narberth has a low crime rate and perceptions amongst shoppers are that this is a safe and pleasant town to shop in.

The maps from the District Valuer's Office and PCC Retail Survey indicate that the centre of Narberth is based around the High Street and Market Square; such evidence will be useful when considering potential policy options for the LDP.

Narberth is currently a strong centre with a niche retail shopping offer. The LDP will 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.

5. Overall Conclusions

The following retail hierarchy within the County has been established:

Haverfordwest
Pembroke Dock and Pembroke
Milford Haven
Fishguard
Narberth

These are the principal town centres for retail in the County. Haverfordwest is the principal Town Centre in terms of retail offer in the County. Whilst Milford Haven has a large amount of A class floorspace, it has been struggling as a centre recently. The focus in Milford Haven will be on consolidating and strengthening its role as a local service provider. Pembroke Dock and Pembroke together make up the County's secondary retail and service centre, serving the South of the County, although Tenby (in the National Park) also plays an important role. Fishguard will continue to play an important role as a service provider in the North of the County. Narberth is a good example of a niche shopping centre with a distinctive retail offer.

Pembrokeshire as a whole has a mixed population, with a higher than average proportion of affluent older people. There are also significant groups of less affluent individuals however, particularly in places such as Milford Haven and Pembroke Dock (see Appendices 4 and 5).

The main retail offer is based within traditional town centres, although some have been struggling (noticeably Milford Haven). The focus of the LDP will be in renewing the traditional town centres of the towns as the most appropriate location for retail, in line with National Policy. Policies will also need to provide the framework for upgrading the built environment which is a priority for the majority of centres.

6. References

Nathaniel Lichfield and Partners Ltd (2008) *Haverfordwest Town Centre Regeneration Framework – The first agenda for a Regeneration Strategy*

Pembrokeshire County Council (2007) *Pembrokeshire County Council Retail Survey 2007* (further information available from Sara Hill PCC)

Wavehill Consulting (2007a) Pembrokeshire Shoppers Survey 2007

Wavehill Consulting (2007b) *Pembrokeshire Residents Survey 2007* Community Planning Partnership (further information available from Dan Shaw, PCC)

Welsh Assembly Government (1996) *Planning Guidance (Wales) Technical Advice Note (Wales) 4, Retailing and Town Centres*. Wales

Welsh Assembly Government (2002) *Planning Policy Wales.* Wales

Welsh Assembly Government (2005) *Ministerial Planning Policy Statement – Planning for Retailing and Town Centres No. 02/2005* Wales

Welsh Assembly Government (2008) *People, Places, Futures: The Wales Spatial Plan 2008 Update Consultation, Area Interim Statement* http://new.wales.gov.uk/about/strategy/spatial/pembrokeshire/Pembsinterim/?lang=en

Welsh Assembly Government's Department of Economy and Transport and Pembrokeshire County Council (2008) *Pembrokeshire Regeneration Masterplan 2008-2012* (further information available from John Turbervill PCC)

7.Appendices

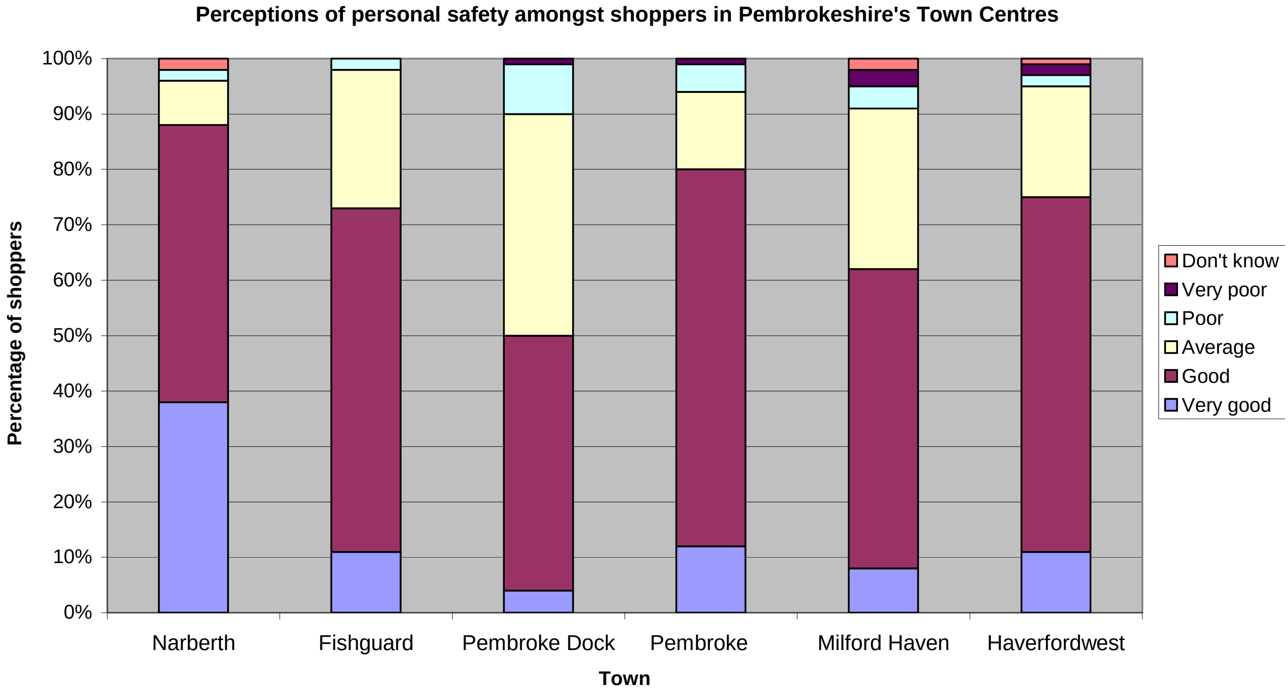
Appendix 1 Summary of Supermarkets in Pembrokeshire County Council and adjoining authorities area

Town	**Supermarket**	**Estimated floor space (gross metres square)**	**Notes**
Fishguard	Somerfield	800	
Fishguard/Goodwick	Tesco Express	260	
Fishguard	Outline permission for a supermarket	1,600	Tesco appears the most likely candidate for this at present.
Haverfordwest	Morrisons	4,500	
Haverfordwest	Tesco	5,000	Extension to this size now complete.
Haverfordwest	Iceland	700	
Haverfordwest	Lidl	1,000	
Haverfordwest	Aldi	1,200	
Milford Haven	Lidl	1,000	
Milford Haven	Tesco	2,500	An application for an extension to this store was approved in June 2008. When implemented this will increase the floorspace to 3,567 (gross).
Pembroke	Somerfield	800	
Pembroke Dock	Tesco	4,500	This figure includes a recent extension which has just been built.
Pembroke Dock	Asda	2,500	
Kilgetty	The Co-operative	1,000	Application in to extend this store – not yet determined.
Others in adjoining authority area			
Carmarthen Tesco Extra		7,000	
Carmarthen Morrisons		3,000	
Carmarthen Marks and Spencer		3,000	
Carmarthen Lidl		650	
Tenby	Somerfield	900	

Source: PCC Retail Survey 2007 and CACI Provision Dataset

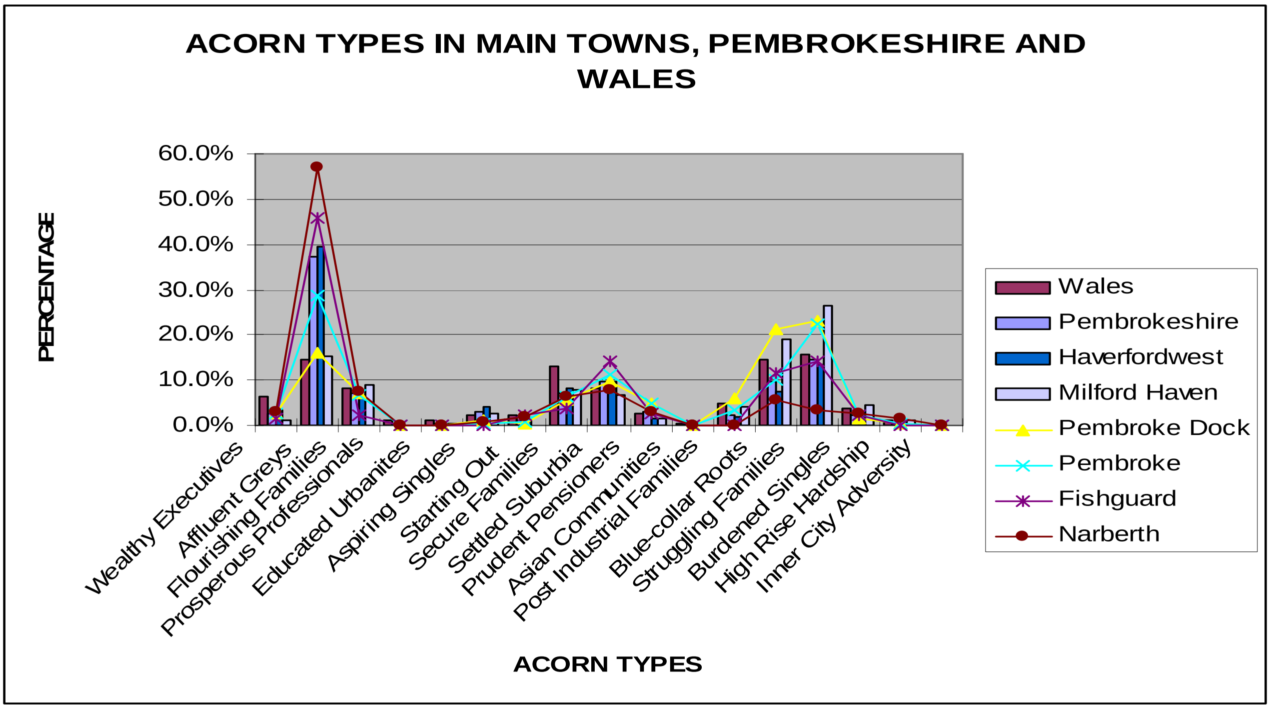
Appendix 2 Personal Safety

The following data is from the results collected by Wavehill Consulting from town centres in Pembrokeshire in 2007



Source: Wavehill Consulting 2007a

Appendix 3 ACORN TYPE DATA (SOURCE: CACI)



CACI have devised a method of categorising populations based on socio-economic criteria. The adjacent graph indicates their analysis of populations in Pembrokeshire towns, alongside a similar breakdown for Pembrokeshire and Welsh populations. Pembrokeshire as a whole has a much higher level of Affluent Greys than Wales as a whole.

Town	**Dominant ACORN Category**	**% age**	**Second ACORN Category**	**%age**	**Third ACORN Category**	**%age**
Fishguard	Affluent Grey	45.8	Settled Suburbia	14.2	Struggling Families	14.1
Haverfordwest	Affluent Grey	39.3	Struggling Families	13.4	Settled Suburbia	9.7
Milford Haven	Struggling Families	26.6	Blue-collar Roots	19.2	Affluent Greys	15.3
Narberth	Affluent Grey	56.9	Settled Suburbia	7.9	Flourishing Families	7.3
Pembroke	Affluent Grey	28.8	Struggling Families	22.5	Settled Suburbia	11.1
Pembroke Dock	Struggling Families	23.2	Blue-collar Roots	21.1	Affluent Greys	15.9

Appendix 4 ACORN TYPE DATA (SOURCE: CACI)

Discussion of the different ACORN Types prevalent in Pembrokeshire:

Affluent Greys tend to be older affluent individuals, often comprised of older empty nesters and retired couples, possibly in managerial, professional or farming occupations. Many have a disposable income and are able to invest in a wide range of products. Car ownership is high.

Flourishing Families these are wealthy families with mortgages, this group tends to be younger than the Affluent Greys. Car ownership is high and income levels are high, often with high levels of savings and investments.

Struggling Families- these tend to be families in traditional low-rise estates, incomes are lower than average with higher than typical levels of unemployment. Money is tight and shopping tends to focus on cheaper stores and catalogues.

Settled Suburbia – these communities tend to consist of empty nesters and retired older couples, possibly living in semi-detached or bungalow properties. Employment is often in manufacturing, lower management, supervisory and retail jobs. These people have a secure income and feel confident about the future.

Blue-collar roots – communities where employment is in traditional blue-collar occupations, families and retired people predominate with some young singles and single parents. Unemployment may be higher than average, car ownership is lower than average and some households may have high levels of debt.

Appendix 5 Violence against the Person Statistics

Home Office Counting Rules For Recorded Crime April 2008

Violence against the Person

1 Murder
2 Attempted Murder
3 No longer used
3A Conspiracy to Murder
3B Threats to Kill
4/1 Manslaughter
4/2 Infanticide
4/3 Intentional Destruction of a Viable Unborn Child
4/4 Causing Death by Dangerous Driving
4/6 Causing Death by Careless Driving under Influence of Drink or Drugs
4/7 Causing or Allowing Death of Child or Vulnerable Person
4/8 Causing Death by Careless or Inconsiderate Driving
4/9 Causing Death by Driving: Unlicensed, Disqualified or Uninsured Drivers
4/10 Corporate Manslaughter
5 No longer used
5A Wounding or carrying out an act Endangering Life
5B Use of Substance or Object to Endanger Life
5C Possession of Items to Endanger Life
6 Endangering Railway Passengers
7 Endangering Life at Sea
8A No longer used
8B No longer used
8C No longer used
8D No longer used
8E No longer used
8F Inflicting Grievous Bodily Harm without Intent
8G Actual Bodily Harm and other Injury
8H Racially or Religiously Aggravated Inflicting Grievous Bodily Harm without Intent
8J Racially or Religiously Aggravated Actual Bodily Harm and other Injury
8K Poisoning or Female Genital Mutilation
8L Harassment
8M Racially or Religiously Aggravated Harassment
9A Public Fear, Alarm or Distress
9B Racially or Religiously Aggravated Public Fear, Alarm or Distress
10A Possession of Firearms with Intent
10B* Possession of Firearms Offences
10C Possession of Other Weapons
10D Possession of Article with Blade or Point
11 Cruelty to and Neglect of Children
12 Abandoning Child Under Two Years
13 Child Abduction
Home Office Counting Rules For Recorded Crime April 2008
14 Procuring Illegal Abortion

~~15 Concealment of Birth~~ (Re-named and moved to Other Offences on 1 April 2008)
37/1 Causing Death by Aggravated Vehicle Taking
104 Assault without Injury on a Constable
105A Assault without Injury
105B Racially or Religiously Aggravated Assault without Injury

Source: Home Office data
http://www.homeoffice.gov.uk/rds/pdfs08/countviolence08.pdf

Appendix 6 Pembrokeshire Residents Survey 2007 Wavehill Consulting
Pembrokeshire Residents Survey 2007 (Wavehill Consulting Study)

In answer to question: **Which ONE of the following town centres in Pembrokeshire do you visit most frequently to shop? (Q15)**

The results were as follows:

Haverfordwest	**48%**
Pembroke Dock	**13%**
Milford Haven	**7%**
Tenby	**6%**
Narberth	**6%**
Pembroke	**4%**
Other	**3%**
St Davids	**1%**
Saundersfoot	**1%**
Neyland	**1%**

The results show that the largest proportion (48%) of respondents use Haverfordwest, the County town as their main shopping centre.

Residents were subsequently asked for their views on the facilities or improvements which might be likely to make them use that town centre more often.

In answer to the question: **Think about the town centre you referred to in question 15 above. What would encourage you to shop there more often? In order of importance rank three of the following things that you feel would make you more likely to shop more frequently in that town centre. (Q16)**

In the aggregated analysis, shown below, which combines all the answers for all town centres, the top priorities were:

- A better range of shops (score: 1354)
- More space for car parking (816)
- A more attractive environment (729)
- Better organised on-street parking (488)
- A better bus service to and from the town (413)