

# ERRATUM

## SOUTH WEST WALES REGIONAL RETAIL STUDY FINAL REPORT

On behalf of Ceredigion County Council, Pembrokeshire County Council, &  
Pembrokeshire Coast National Park Authority

February 2017  
One Chapel Place, London, W1G 0BG

**Carter Jonas**

### Executive Summary

Page ii Haverfordwest second sentence to read

However, in the longer term to 2036, capacity emerges for up to 2,916 sqm net for new comparison goods, which accounts for the majority of forecast floorspace for Pembrokeshire County and Pembrokeshire Coast National Park.

### Population and Expenditure Forecasts

Final Report Page 47 paragraphs 9.9 and 9.10 to read as follows –

9.9 The population 2014-based figures show that there are 208,538 persons resident in the wider study area in 2016. Of this total, some 117,813 (56.5%) reside in the Pembrokeshire catchment area, which comprises Zones 1 to 9, and includes Pembrokeshire County and Pembrokeshire Coast National Park. Within the Ceredigion catchment area, which includes Zones 10-16, some 99,725 persons are resident in the catchment.

9.10 The study area population is projected to increase by +2.8% between 2016 and 2036 (by 4,866 people). In comparison, the Pembrokeshire catchment area is projected to decrease by 0.6% to 117,119 over the same period. Population projections for the Ceredigion catchment area are higher at 6.1% with the population increasing to 96,285 by 2036.

### Appendix 4a Population and Expenditure and 4b Alternative Population Projections

Replace Appendix 4a and 4b with the following -

## APPENDIX 4A: POPULATION & EXPENDITURE

TABLE 1: BASE YEAR (2016) POPULATION & PROJECTIONS (to 2036): 2014-BASED WELSH GOVERNMENT PROJECTIONS

ZONE:		2016	2021	2026	2031	2036	GROWTH 2016 to 2036:	
							%	2016-36
Zone 1	Haverfordwest	14,427	14,482	14,509	14,463	14,341	-0.6%	-86
Zone 2	Wiston	5,942	5,965	5,976	5,957	5,907	-0.6%	-35
Zone 3	St Davids/ Marloes	11,355	11,398	11,420	11,383	11,287	-0.6%	-68
Zone 4	Milford Haven	20,590	20,668	20,707	20,641	20,467	-0.6%	-123
Zone 5	Pembroke	21,095	21,175	21,215	21,147	20,969	-0.6%	-126
Zone 6	Tenby	17,774	17,841	17,875	17,817	17,668	-0.6%	-106
Zone 7	Narberth	10,066	10,105	10,127	10,097	10,015	-0.5%	-51
Zone 8	Abercastle	12,327	12,374	12,397	12,358	12,254	-0.6%	-73
Zone 9	Fishguard	4,237	4,253	4,261	4,247	4,211	-0.6%	-26
Zone 10	Cardigan	20,219	20,451	20,705	20,921	21,082	4.3%	863
Zone 11	Llandysul and Aberporth	11,311	11,464	11,636	11,796	11,930	5.5%	619
Zone 12	Lampeter	12,552	12,729	12,931	13,123	13,290	5.9%	738
Zone 13	Central Coast incl. Aberaeron & New Quay	8,739	8,878	9,043	9,209	9,365	7.2%	626
Zone 14	Aberystwyth Rural South incl. Tregaron	10,023	10,183	10,372	10,562	10,741	7.2%	718
Zone 15	Aberystwyth	11,259	11,439	11,651	11,865	12,065	7.2%	806
Zone 16	Aberystwyth Rural North	16,622	16,887	17,200	17,516	17,812	7.2%	1,190
<b>Study Area</b>		<b>208,538</b>	<b>210,292</b>	<b>212,025</b>	<b>213,102</b>	<b>213,404</b>	<b>2.3%</b>	<b>4,866</b>
Pembrokeshire Catchment Area (Zones 1-9)		117,813	118,261	118,487	118,110	117,119	-0.6%	-694
Ceredigion Catchment Area (Zones 10-16)		90,725	92,031	93,538	94,992	96,285	6.1%	5,560

Source: The base year (2016) population and projections to 2036 have been sourced directly from the Partner Authorities and are based on Welsh Government 2014-based projections derived from the ONS 2011 Census. A methodology note contained in this appendix explains how the Welsh Government forecasts are broken down for each study zone.

TABLE 2: REVISED CONVENIENCE EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

		2016 (incl SFT)	2016	2021	2026	2031	2036	% GROWTH:	
								2016-36	
<b>EXPERIAN - SPECIAL FORMS OF TRADING (%):</b>			<b>3.0%</b>	<b>3.9%</b>	<b>4.6%</b>	<b>5.0%</b>	<b>5.3%</b>	<b>76.7%</b>	
<b>REVISED SPECIAL FORMS OF TRADING (%):</b>			<b>1.1%</b>	<b>1.3%</b>	<b>1.6%</b>	<b>1.8%</b>	<b>1.9%</b>	<b>76.7%</b>	
Zone 1	Haverfordwest	£1,851	£1,832	£1,806	£1,806	£1,813	£1,820	-0.6%	
Zone 2	Wiston	£2,302	£2,278	£2,245	£2,246	£2,254	£2,263	-0.6%	
Zone 3	St Davids/ Marloes	£2,321	£2,296	£2,264	£2,265	£2,273	£2,282	-0.6%	
Zone 4	Milford Haven	£1,927	£1,906	£1,879	£1,880	£1,887	£1,894	-0.6%	
Zone 5	Pembroke	£1,963	£1,942	£1,914	£1,915	£1,922	£1,929	-0.6%	
Zone 6	Tenby	£2,175	£2,151	£2,121	£2,122	£2,129	£2,138	-0.6%	
Zone 7	Narberth	£2,364	£2,339	£2,306	£2,307	£2,315	£2,324	-0.6%	
Zone 8	Abercastle	£2,243	£2,219	£2,187	£2,188	£2,196	£2,205	-0.6%	
Zone 9	Fishguard	£2,581	£2,553	£2,517	£2,518	£2,527	£2,537	-0.6%	
Zone 10	Cardigan	£2,155	£2,132	£2,102	£2,103	£2,110	£2,119	-0.6%	
Zone 11	Llandysul and Aberporth	£2,238	£2,214	£2,183	£2,184	£2,191	£2,200	-0.6%	
Zone 12	Lampeter	£2,098	£2,075	£2,046	£2,047	£2,054	£2,062	-0.6%	
Zone 13	Central Coast incl. Aberaeron & New Quay	£2,155	£2,132	£2,101	£2,102	£2,110	£2,118	-0.6%	
Zone 14	Aberystwyth Rural South incl. Tregaron	£2,119	£2,097	£2,067	£2,068	£2,075	£2,083	-0.6%	
Zone 15	Aberystwyth	£2,303	£2,278	£2,246	£2,247	£2,255	£2,263	-0.6%	
Zone 16	Aberystwyth Rural North	£2,019	£1,998	£1,969	£1,970	£1,977	£1,985	-0.6%	
<b>Study Area</b>		<b>£2,188</b>	<b>£2,153</b>	<b>£2,122</b>	<b>£2,123</b>	<b>£2,131</b>	<b>£2,139</b>	<b>-0.6%</b>	
Pembrokeshire Catchment Area (Zones 1-9)		£2,192	£2,168	2,138	2,139	2,146	2,155	-0.6%	
Ceredigion Catchment Area (Zones 10-16)		£2,155	£2,132	2,102	2,103	2,110	2,119	-0.6%	

Source: Average spend per capita estimates (2014 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 14 published by Experian Business Strategies (November 2016).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year using the household survey market shares for SFT. Forecast growth in SFT is based on and over forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 14.

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, BASE YEAR (2016) TO 2036 (£m)

		2016 (incl SFT)	2016	2021	2026	2031	2036	GROWTH: 2016-36	
								%	£m
Zone 1	Haverfordwest	£26.7	£26.4	£26.1	£26.2	£26.2	£26.1	-1.2%	-£0.3
Zone 2	Wiston	£13.7	£13.5	£13.4	£13.4	£13.4	£13.4	-1.2%	-£0.2
Zone 3	St Davids/ Marloes	£26.4	£26.1	£25.8	£25.9	£25.9	£25.8	-1.2%	-£0.3
Zone 4	Milford Haven	£39.7	£39.2	£38.8	£38.9	£38.9	£38.8	-1.2%	-£0.5
Zone 5	Pembroke	£41.4	£41.0	£40.5	£40.6	£40.6	£40.5	-1.2%	-£0.5
Zone 6	Tenby	£38.7	£38.2	£37.8	£37.9	£37.9	£37.8	-1.2%	-£0.5
Zone 7	Narberth	£23.8	£23.5	£23.3	£23.4	£23.4	£23.3	-1.1%	-£0.3
Zone 8	Fishguard	£27.6	£27.4	£27.1	£27.1	£27.1	£27.0	-1.2%	-£0.3
Zone 9	Newport	£10.9	£10.8	£10.7	£10.7	£10.7	£10.7	-1.2%	-£0.1
Zone 10	Cardigan	£43.6	£43.1	£43.0	£43.5	£44.2	£44.7	3.6%	£1.6
Zone 11	Llandysul and Aberporth	£25.3	£25.0	£25.0	£25.4	£25.8	£26.2	4.8%	£1.2
Zone 12	Lampeter	£26.3	£26.0	£26.0	£26.5	£27.0	£27.4	5.2%	£1.4
Zone 13	Central Coast incl. Aberaeron & New Quay	£18.8	£18.6	£18.7	£19.0	£19.4	£19.8	6.5%	£1.2
Zone 14	Aberystwyth Rural South incl. Tregaron	£21.2	£21.0	£21.0	£21.4	£21.9	£22.4	6.5%	£1.4
Zone 15	Aberystwyth	£25.9	£25.6	£25.7	£26.2	£26.8	£27.3	6.5%	£1.7
Zone 16	Aberystwyth Rural North	£33.6	£33.2	£33.3	£33.9	£34.6	£35.4	6.5%	£2.2
<b>Study Area</b>		<b>£443.6</b>	<b>£438.9</b>	<b>£436.3</b>	<b>£440.1</b>	<b>£444.0</b>	<b>£446.4</b>	<b>1.7%</b>	<b>£7.5</b>
Pembrokeshire Catchment Area (Zones 1-9)		£248.9	£246.2	£243.6	£244.2	£244.3	£243.2	-1.2%	-£3.0
Ceredigion Catchment Area (Zones 10-16)		£194.8	£192.7	£192.7	£195.9	£199.7	£203.2	5.4%	£10.5

Notes: Table 1 and Table 3

TABLE 4: REVISED COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

% GROWTH:

ZONE:	2016 (incl SFT)	2016	2021	2026	2031	2036	2016-36
<b>EXPERIAN - SPECIAL FORMS OF TRADING (%):</b>		<b>13.2%</b>	<b>15.6%</b>	<b>16.1%</b>	<b>16.3%</b>	<b>16.5%</b>	25.0%
<b>REVISED SPECIAL FORMS OF TRADING (%):</b>		<b>16.3%</b>	<b>18.8%</b>	<b>19.8%</b>	<b>20.1%</b>	<b>20.3%</b>	25.0%
Zone 1 Haverfordwest	£2,767	£2,317	£2,501	£2,895	£3,378	£3,942	70.1%
Zone 2 Wiston	£3,791	£3,175	£3,427	£3,966	£4,628	£5,401	70.1%
Zone 3 St Davids/ Marloes	£3,565	£2,986	£3,223	£3,730	£4,353	£5,080	70.1%
Zone 4 Milford Haven	£2,642	£2,212	£2,389	£2,764	£3,225	£3,764	70.1%
Zone 5 Pembroke	£2,827	£2,368	£2,556	£2,958	£3,452	£4,028	70.1%
Zone 6 Tenby	£3,502	£2,932	£3,166	£3,663	£4,275	£4,989	70.1%
Zone 7 Narberth	£3,625	£3,036	£3,277	£3,792	£4,425	£5,164	70.1%
Zone 8 Fishguard	£3,309	£2,771	£2,992	£3,462	£4,040	£4,715	70.1%
Zone 9 Newport	£3,888	£3,256	£3,515	£4,068	£4,747	£5,540	70.1%
Zone 10 Cardigan	£3,254	£2,725	£2,942	£3,404	£3,972	£4,636	70.1%
Zone 11 Llandysul and Aberporth	£3,298	£2,762	£2,982	£3,450	£4,027	£4,699	70.1%
Zone 12 Lampeter	£3,011	£2,522	£2,722	£3,150	£3,676	£4,290	70.1%
Zone 13 Central Coast incl. Aberaeron & New Quay	£3,108	£2,603	£2,810	£3,252	£3,795	£4,428	70.1%
Zone 14 Aberystwyth Rural South incl. Tregaron	£3,157	£2,643	£2,854	£3,302	£3,854	£4,497	70.1%
Zone 15 Aberystwyth	£3,338	£2,795	£3,017	£3,492	£4,075	£4,755	70.1%
Zone 16 Aberystwyth Rural North	£3,124	£2,616	£2,824	£3,268	£3,814	£4,450	70.1%
<b>Study Area</b>	<b>£3,263</b>	<b>£2,732</b>	<b>£2,950</b>	<b>£3,414</b>	<b>£3,983</b>	<b>£4,649</b>	70.1%
Pembrokeshire Catchment Area (Zones 1-9)	£3,324	£2,784	3,005	3,478	4,058	4,736	70.1%
Ceredigion Catchment Area (Zones 10-16)	£3,184	£2,667	2,879	3,331	3,887	4,536	70.1%

Source: Average spend per capita estimates (2014 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 14 published by Experian Business Strategies (November 2016).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year using the household survey market shares for SFT. Forecast growth in SFT is based on and over forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 14.

TABLE 5: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, 2016 - 2036 (£m)

GROWTH: 2016-36

ZONE:	2016 (incl SFT)	2016	2021	2026	2031	2036	%	£m
Zone 1 Haverfordwest	£39.9	£33.4	£36.2	£42.0	£48.9	£56.5	63.8%	£23.1
Zone 2 Wiston	£22.5	£18.9	£20.4	£23.7	£27.6	£31.9	63.8%	£13.0
Zone 3 St Davids/ Marloes	£40.5	£33.9	£36.7	£42.6	£49.5	£57.3	63.8%	£23.4
Zone 4 Milford Haven	£54.4	£45.6	£49.4	£57.2	£66.6	£77.0	63.8%	£31.5
Zone 5 Pembroke	£59.6	£49.9	£54.1	£62.8	£73.0	£84.5	63.8%	£34.5
Zone 6 Tenby	£62.2	£52.1	£56.5	£65.5	£76.2	£88.1	63.8%	£36.0
Zone 7 Narberth	£36.5	£30.6	£33.1	£38.4	£44.7	£51.7	63.9%	£21.2
Zone 8 Fishguard	£40.8	£34.2	£37.0	£42.9	£49.9	£57.8	63.8%	£23.6
Zone 9 Newport	£16.5	£13.8	£15.0	£17.3	£20.2	£23.3	63.7%	£9.5
Zone 10 Cardigan	£65.8	£55.1	£60.2	£70.5	£83.1	£97.7	70.9%	£42.6
Zone 11 Llandysul and Aberporth	£37.3	£31.2	£34.2	£40.1	£47.5	£56.1	72.6%	£24.8
Zone 12 Lampeter	£37.8	£31.7	£34.7	£40.7	£48.2	£57.0	73.2%	£25.4
Zone 13 Central Coast incl. Aberaeron & New Quay	£27.2	£22.7	£24.9	£29.4	£34.9	£41.5	75.1%	£18.7
Zone 14 Aberystwyth Rural South incl. Tregaron	£31.6	£26.5	£29.1	£34.3	£40.7	£48.3	75.0%	£21.8
Zone 15 Aberystwyth	£37.6	£31.5	£34.5	£40.7	£48.3	£57.4	75.0%	£25.9
Zone 16 Aberystwyth Rural North	£51.9	£43.5	£47.7	£56.2	£66.8	£79.3	75.0%	£35.8
<b>Study Area</b>	<b>£662.2</b>	<b>£554.5</b>	<b>£603.7</b>	<b>£704.3</b>	<b>£826.1</b>	<b>£965.4</b>	<b>68.1%</b>	<b>£410.9</b>
Pembrokeshire Catchment Area (Zones 1-9)	£373.0	£312.3	£338.5	£392.4	£456.5	£528.2	69.1%	£215.9
Ceredigion Catchment Area (Zones 10-16)	£289.2	£242.2	£265.2	£311.9	£369.6	£437.2	80.5%	£195.0

Notes: Table 1 and Table 4

## METHODOLOGY NOTE ON POPULATION PROJECTIONS

The population projections for the retail study were originally estimated using Experian's 'demographic component model' for 16 study zones within an area roughly corresponding to the combined area of Ceredigion and Pembrokeshire defined as groups of postcode sectors. Experian's population projections are based on the ONS 2011 Census (released July 2013).

Ceredigion and Pembrokeshire County Councils requested that projections published by the Welsh Government for each of the Unitary Authority areas in Wales are applied. Two population scenarios are considered: 2014-based (Table 1, Appendix 4a) and 2011-based projections (Appendix 4b) from the Welsh Government.

Whilst it is possible to derive base populations for the original postcode sector based areas from Census data for Output Areas, obtaining age specific death, birth and migration rates for these areas would be more difficult. Therefore, the population projections for Ceredigion, Pembrokeshire and Carmarthenshire<sup>1</sup> were apportioned for each authority area (and zones) based on the population distribution at the 2011 Census. This was achieved by:

- Calculating the proportion of the Pembrokeshire population in each of Pembrokeshire's Census Output Areas (OAs) at the 2011 Census based on 'usual resident population'. The same approach was used for Ceredigion and Carmarthenshire.
- Estimating the projected population in each OA for each projected year using the formula:  $UA \text{ Projected Population} \times OA \text{ Population as Proportion of UA Population in 2011}$ .
- Assigning Census 2011 OAs to retail areas based on the location of the Population Weighted Centroid<sup>2</sup>. This is the same technique used by ONS to assign Census data to non-output area geographies by their best fit approach<sup>3</sup>.
- Calculating the projected population in each retail area for each projected year as the sum of the estimated projected populations for the OAs assigned to each retail area.

As well as the assumptions made in the original Unitary Authority projections (static birth, death and migration rates throughout the projection period), a further assumption of a static spatial distribution of the population throughout the projection period is made.

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<sup>1</sup> There is some overlap of the postcode sector defined study area into Carmarthenshire.

<sup>2</sup> <http://www.ons.gov.uk/ons/guide-method/geography/products/census/spatial/centroids/population-weighted-centroids-guidance.pdf>

<sup>3</sup> <http://www.ons.gov.uk/ons/guide-method/census/2011/census-data/2011-census-prospectus/new-developments-for-2011-census-results/2011-census-geography/exact-fit-and-best-fit-estimates/BFOverview.pdf>

**APPENDIX 4B: ALTERNATIVE POPULATION PROJECTIONS**

**ALTERNATIVE BASE YEAR (2016) POPULATION & PROJECTIONS (to 2036): 2011-BASED WELSH GOVERNMENT PROJECTIONS**

**GROWTH 2016 to 2036**

ZONE:		2016	2021	2026	2031	2036	%	2016-36
Zone 1	Haverfordwest	14,477	14,653	14,752	14,761	14,705	1.6%	228
Zone 2	Wiston	5,963	6,035	6,076	6,079	6,056	1.6%	93
Zone 3	St Davids/ Marloes	11,395	11,533	11,611	11,617	11,574	1.6%	179
Zone 4	Milford Haven	20,661	20,912	21,053	21,065	20,986	1.6%	325
Zone 5	Pembroke	21,168	21,425	21,570	21,582	21,501	1.6%	333
Zone 6	Tenby	17,835	18,052	18,174	18,184	18,116	1.6%	281
Zone 7	Narberth	10,106	10,234	10,308	10,321	10,289	1.8%	183
Zone 8	Abercastle	12,370	12,520	12,605	12,612	12,565	1.6%	195
Zone 9	Fishguard	4,251	4,303	4,332	4,334	4,318	1.6%	67
Zone 10	Cardigan	20,320	20,612	20,866	21,025	21,096	3.8%	776
Zone 11	Llandysul and Aberporth	11,403	11,604	11,793	11,935	12,028	5.5%	625
Zone 12	Lampeter	12,640	12,849	13,049	13,197	13,292	5.2%	652
Zone 13	Central Coast incl. Aberaeron & New Quay	8,768	8,884	9,001	9,084	9,129	4.1%	361
Zone 14	Aberystwyth Rural South incl. Tregaron	10,056	10,189	10,324	10,419	10,470	4.1%	414
Zone 15	Aberystwyth	11,296	11,445	11,597	11,704	11,761	4.1%	465
Zone 16	Aberystwyth Rural North	16,677	16,897	17,120	17,279	17,363	4.1%	686
<b>Study Area</b>		<b>211,300</b>	<b>214,085</b>	<b>216,109</b>	<b>217,017</b>	<b>217,136</b>	<b>2.8%</b>	<b>5,836</b>
<b>Pembrokeshire Catchment Area (Zones 1-9)</b>		<b>118,226</b>	<b>119,667</b>	<b>120,481</b>	<b>120,555</b>	<b>120,110</b>	<b>1.6%</b>	<b>1,884</b>
<b>Ceredigion Catchment Area (Zones 10-16)</b>		<b>91,160</b>	<b>92,480</b>	<b>93,750</b>	<b>94,643</b>	<b>95,139</b>	<b>4.4%</b>	<b>3,979</b>

Source: The base year (2016) population and projections to 2036 have been sourced directly from the Partner Authorities and are based on Welsh Government 2011-based projections derived from the ONS 2011 Census.

Note: The 2011-based population projections have been used to inform alternative retail capacity forecasts as set out in Appendices 8b, 9b, 10b

Compiled by Pembrokeshire County Council July 2017