

Appendix 2 – Baseline data

Please note that this document is a working document and will be updated periodically (this version December 2008).

1. Population

Population facts and figures

The population of Pembrokeshire, excluding areas in the National Park, was 91,589 at the last Census in 2001. The population of the entire County was 114,131 which is 3.9% of the Wales population of 2,903,085. The population density of the area is 0.71 people per hectare (71 people per square kilometre).

Table 1: Mid year estimates of population

Mid Year Estimates	2001	2002	2003	2004	2005	2006
Males	54,386	54,841	55,958	56,348	56,538	56,844
Females	58,672	58,993	59,814	60,166	60,225	60,436
All Persons	113,058	113,834	115,772	116,514	116,763	117,280

Source: Community Profile Database

Table 2: Breakdown of age groups

	2001	2002	2003	2004	2005	2006
0-4	6,703	5272	6,322	6,150	6039	6038
	5.9	4.6	5.5	5.3	5.2	5.1
15-29	17,483	17,118	17,440	16,274	17,936	18,435
	15.5	15.0	15.1	14.0	15.4	15.7
65+	21,909	20,929	22,436	23,140	23,387	23,712
	19.4	18.4	19.4	19.9	20.0	20.2
Total	113,058	113,834	115,772	116,514	116,763	117,280

Source: Community Profile Database

Table 3: Population projections

Projections	2006	2011	2016	2021	2026	2031
Males	57,629	59,946	61,837	63,312	64,327	64,732
Females	60,280	61,219	61,949	62,490	62,604	62,120
All Persons	117,909	121,165	123,786	125,802	126,931	126,852

Source: Pop Group Model

Table 4: Projections by age split

All Persons	2001	2006	2011	2016	2021	2026	2031
0-4	6,703	6,097	6,115	6,284	6,371	6,177	5,842
%	5.9	5.2	5.0	5.1	5.1	4.9	4.6
15-29	17483	18541	20121	20724	19985	19270	18908
%	15.3	15.7	16.6	16.7	15.9	15.2	14.9
65+	21909	23883	26817	30783	33079	35187	37592
%	19.2	20.3	22.1	24.9	26.3	27.7	29.6
Total Pop	114,138	117,909	121,165	123,786	125,802	126,931	126,852

Source: Pop Group Model

Wales = Under 5 2003 – 5.4% Over 65 – 17.5
 Under 5 2026 - Over 65 – 23.8%

Table 5: Projections for males

Males	2001	2006	2011	2016	2021	2026	2031
0-4	3531	3263	3266	3357	3403	3300	3122
%	6.4	5.7	5.4	5.4	5.4	5.1	4.8
15-29	8594	9416	10372	11082	11041	10969	10806
%	15.6	16.3	17.3	17.9	17.4	17.1	16.7
65+	9455	10741	12289	14343	15479	16414	17388
%	17.2	18.6	20.5	23.2	24.4	25.5	26.9
Total Males	55039	57629	59946	61837	63312	64327	64732

Source: Pop Group Model

Table 6: Projections for females

Females	2001	2006	2011	2016	2021	2026	2031
0-4	3172	2834	2848	2927	2967	2877	2721
%	5.4	4.7	4.7	4.7	4.7	4.6	4.4
15-29	8889	9125	9748	9642	8943	8301	8103
%	15.0	15.1	15.9	15.6	14.3	13.3	13.0
65+	12454	13142	14528	16440	17601	18775	20205
%	21.1	21.8	23.7	26.5	28.2	30.0	32.5
Total Females	59099	60280	61219	61949	62490	62604	62120

Source: Pop Group Model

Source: Office of National Statistics

The following projections (Table 6b) have been developed using standard demographic methods and utilised data from government agencies, particularly the Office for National Statistics. The table summarises the results for the census based projection, which assumed continuation of recent trends of population change in respect of migration, births, fertility and mortality (Population and Housing Paper, PCC, 2008).

Table 6b: Population, Household and Labour Projections 2001 – 2021

Area	2001	2006	2011	2016	2021	% Change 2001-21
Pembrokeshire						
Population	114,138	117,411	119,591	122,112	124,587	+ 9.2
Households	47,319	49,437	51,337	53,639	55,841	+18.0
Labour Force	48,260	50,550	52,655	54,220	55,075	+14.1
PCNP						
Population	22,537	22,064	21,519	21,079	20,649	-8.4
Households	9,845	9,832	9,768	9,788	9,785	-0.6
Labour Force	9,640	9,635	9,460	9,200	8,825	-8.5
County Outside Park						
Population	91,601	95,347	98,073	101,033	103,938	+13.5
Households	37,474	39,605	41,569	43,851	46,057	+22.9
Labour Force	38,620	40,920	43,200	45,015	46,245	+17.8

Source: Population and Housing Paper, PCC, 2008

Figure 1: Population Age Pyramid (2005/10 Comparison)

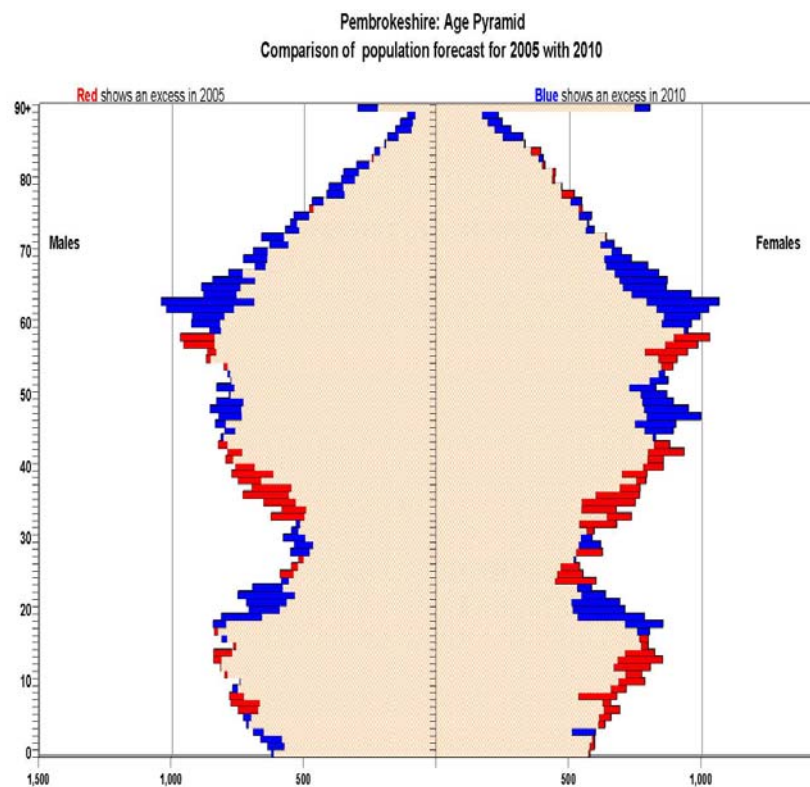
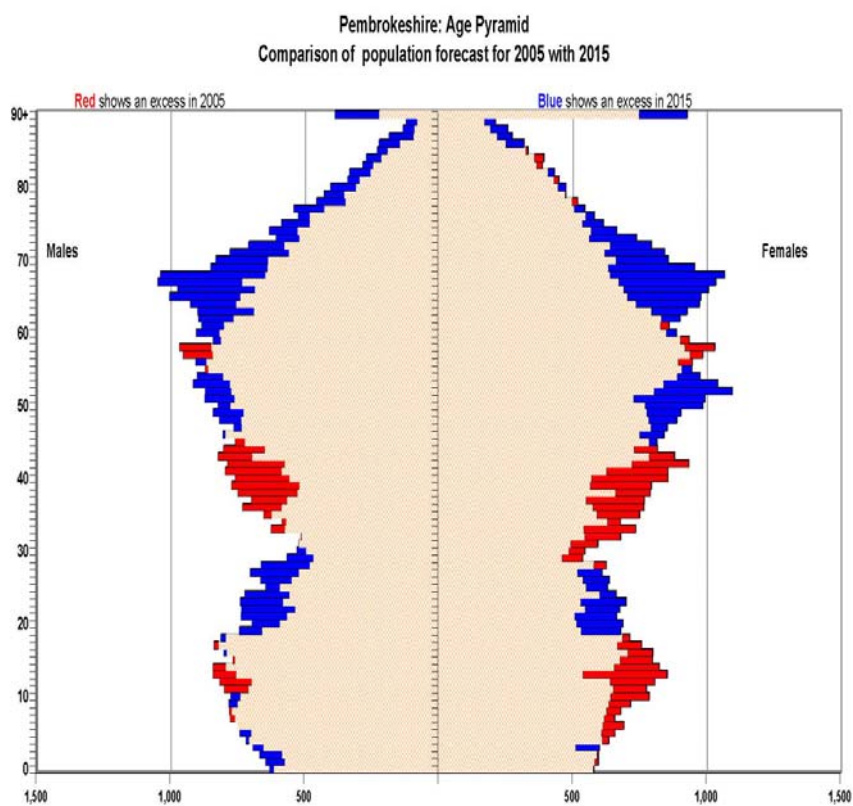


Figure 2: Population Age Pyramid (2005/10 Comparison)



Pembrokeshire has a total population of 114,131 (2001 Census) of whom 48% are male and 52% female (though it should be noted the County's

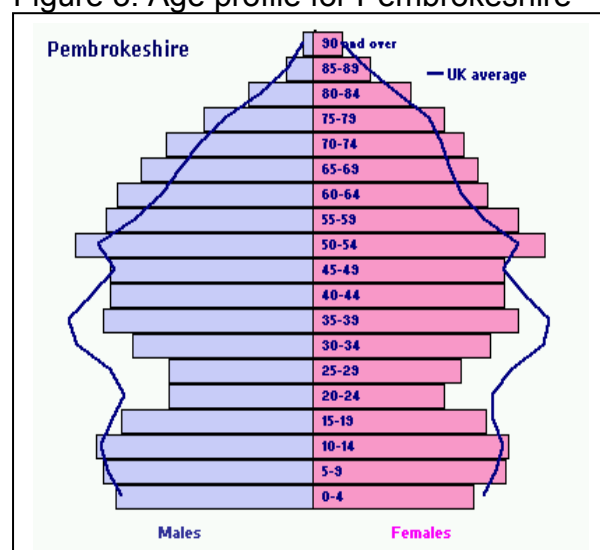
population can increase by 100% as a result of summer tourism). This equates to a figure of approximately 71 people/km².

Table 7: Population by age, 2001

POPULATION (Number and Percentage) BY AGE, 2001		
Age Band	Pembrokeshire	
	Number	%
0 - 15	23,394	20.5
16 to 74	80,763	70.8
75 and over	9,974	8.7

The age profile shown in Figure 3 below¹ demonstrates that the population is skewed towards the 45 to 74 age range, and away from the 20 to 44 age range compared to the UK average. This is a reflection of the tendency for young people to leave the County to seek higher education and to begin their careers. However, there is anecdotal evidence of these people subsequently returning to the County in later life, often prior to retirement. The proportion of individuals over the age of 65 is already higher than the Welsh average (19.2% compared to 17.39% in 2001, Census 2001).

Figure 3: Age profile for Pembrokeshire



Life Expectancy

Table 8: Life expectancy in Pembrokeshire and Wales

		Male	Female
1995-1997	Pembrokeshire	74.3	79.7
	Wales	74.0	79.2
1997-1998	Pembrokeshire	74.5	79.6
	Wales	74.5	79.5
1998-2000	Pembrokeshire	74.9	79.7
	Wales	74.8	79.7
2002-2004	Pembrokeshire	76.0	80.5
	Wales	75.8	80.3

¹ Source: Office of National Statistics

Population Future Trend

Life expectancy in Pembrokeshire is continuously higher for both males and females than the national average and is increasing at the same rate.

Sources

ONS, 2001 Census (Life Expectancy at Birth, 2002-2004)
Community Profiling Database

Mortality by Cause

Table 9: Mortality by cause - males

Males	All Causes	1	2	3	4	5	6	7	8	9	10	11	12	13
2001	696	203	7	22	44	30	17	270	167	50	80	22	43	5
2002	681	195	9	21	41	22	9	279	161	52	53	19	24	10
2003	686	201	12	20	42	40	8	287	155	73	65	19	30	11
2004	648	220	14	32	46	43	15	221	130	49	73	24	28	7

Table 10: Mortality by cause - females

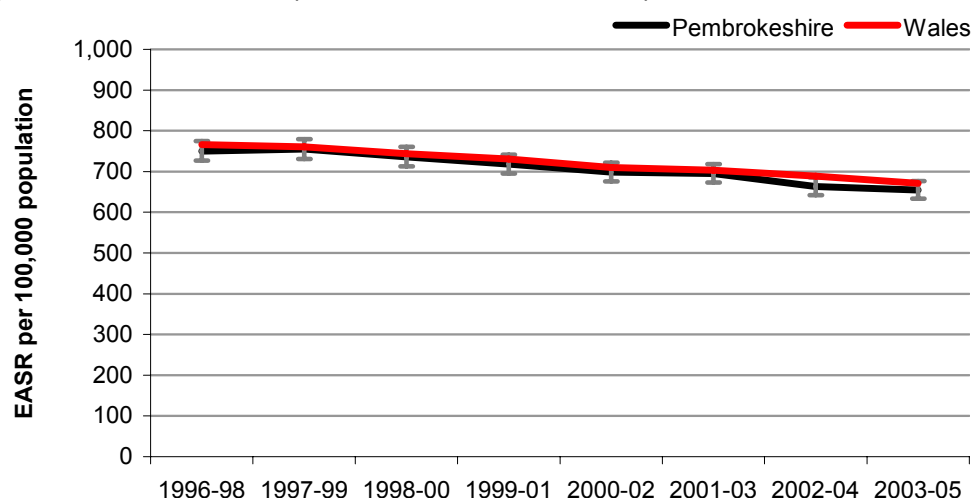
Females	All Causes	1	2	3	4	5	6	7	8	9	10	11	12	13
2001	679	164	9	18	32	28	6	285	126	93	80	35	31	0
2002	696	185	7	18	25	42	8	267	98	95	72	28	33	0
2003	730	188	6	26	29	37	14	287	111	95	90	41	25	4
2004	664	155	8	17	35	31	14	274	107	101	66	24	24	3

Mortality Causes

- 1 – Malignant Neoplasms
- 2 – Malignant Neoplasms of stomach
- 3 – Malignant neoplasms of colon rectosigmoid junction rectum and anus
- 4 – Malignant neoplasm of trachea bronchus and lung
- 5 – Malignant neoplasm of breast
- 6 – Diabetes mellitus
- 7 – Disease of the circulatory system
- 8 – Ischaemic heart diseases
- 9 – Cerebrovascular diseases
- 10 – Diseases of the respiratory system
- 11 – Pneumonia
- 12 – Bronchitis emphysema and other chronic obstructive pulmonary disease
- 13 – Land transport accidents

Source: Community Profile Database

Figure 4: All cause mortality European age standardised rate (EASR), persons: 1996-2005 (ONS, StatsWales, WAG)

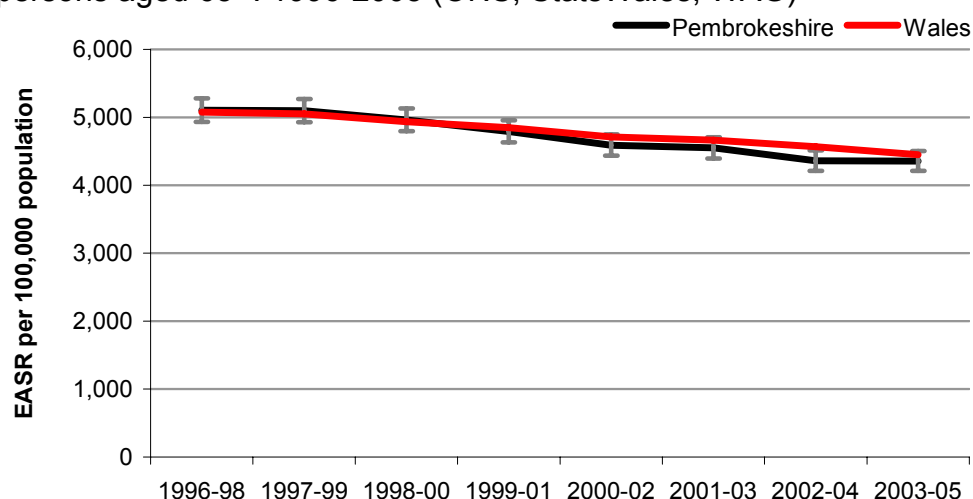


The European age standardised mortality rate (EASR) in Pembroke LHB residents for all causes decreased by almost 13 per cent from 750 in 1996-98 to 655 in 2003-05. Over the same period the equivalent EASR for Wales fell by almost 12.5 per cent.

Over the 10-year period, the EASR in Pembroke was virtually identical to the Wales rate.

Source: Health Needs Assessment Trend Data 2007 – Pembroke Local Health Board

Figure 5: All cause mortality European age standardised rate (EASR), persons aged 65+: 1996-2005 (ONS, StatsWales, WAG)



The average annual number of deaths for Pembroke LHB residents aged 65 and over has increased by over one and a half per cent from 1,156 in 1996-98 to 1,175 in 2003-05. Over the same period the equivalent number of deaths in Wales decreased by just over five per cent.

The European age standardised mortality rate (EASR) in Pembrokeshire LHB residents aged 65 and over for all causes decreased by over 14.5 per cent from 5,105 in 1996-98 to 4,356 in 2003-05. Over the same period the equivalent EASR for Wales fell by almost 12.5 per cent.

Over the 10-year period, the EASR in Pembrokeshire was very similar to the Wales rate.

Source: Health Needs Assessment Trend Data 2007 – Pembrokeshire Local Health Board

Infant Mortality

The infant mortality rate is one of the key statistics generally used to indicate the general health of the population. Higher infant mortality rates (i.e. deaths of children below the age of one year) are associated with areas of high deprivation.

The infant mortality rate in Pembrokeshire declined in the late 1990's from 7.6 per 1,000 live births to 5.2 per 1,000 live births compared with a much smaller decline over Wales as a whole. The latest all-Wales figures (2003) are 4.3 per 1,000 live births.

Comparators

National Rate 2003: 4.3%

National Rate 2002: 4.5%

National Rate 2001: 5.4

Data Gaps

Infant mortality rates for Unitary Authorities

Sources

Key Health Statistics, WAG

Ethnicity - 2001

Table 11: Ethnicity in 2001

	Pembrokeshire	Wales
White	99.1	97.9
Mixed	0.3	0.6
Asian or Asian British	0.3	0.9
Black or Black British	0.1	0.3
Chinese or Other	0.2	0.4
% from Ethnic Minority Group	0.9	2.0
Percentage Identifying themselves as Welsh	13	14
Percentage of people born outside Wales	31.3	

Data Gaps and Uncertainties

None Identified

Sources

ONS, 2001 Census (Map 49, National SEA of WSP)

ONS, 2001 Census (KSO6A – Ethnic Group and Identification as Welsh)

<http://www.neighbourhood.statistics.gov.uk/dissemination/LeadTableView.do?a=3&b=276866&c=pembrokeshire&d=13&e=15&q=415946&i=1001x1003x1004&m=0&r=1&s=1216908611988&enc=1&dsFamilyId=15>

WSP Topic Paper J: Population

Welsh Index of Multiple Deprivation (WIMD)

% People living in most deprived area

Pembroke Dock Llanion = 2.2% of Pembrokeshire Population (2001 Census)
The Index of deprivation was calculated by the Welsh Index of Multiple Deprivation (2005) as the official measure of deprivation in Wales which is made up of separate domains; income (25%), employment (25%), health (15%), education, skills and training (15%), housing (5%), physical environment (5%) and geographical access to services (10%). The table also shows the ranking of the electoral divisions in Wales. The rankings are based on the level of deprivation, with a rank of one being the most deprived.

The deprivation scores from the 2008 index can't be compared with those from 2005. The parts that make up the index are different, and the indexes were worked out in different ways. But even if these changes had not been made, comparisons would still not be valid. An area's score is affected by the scores of every other area; so it is impossible to tell whether a change in score is a real change in the deprivation level of an area, or whether it is due to the scores of other areas going up or down (WAG, 2008).

Table 12: Welsh Index of Multiple Deprivation in Pembrokeshire and Wales

Ward	Pembs Ranking (1-71) 2005	Welsh Ranking 2005 (1-1896)	Welsh Ranking (2008) (1-1896)
Pembroke Dock: Llanion 1	1	55	71
Pembroke: Monkton	2	76	92
Haverfordwest: Garth 2	3	200	222
Milford: West	4	290	372
Milford: Hubberston 2	5	332	358
Pembroke: St Mary North	6	350	343
Haverfordwest: Castle	7	417	441
Pembroke Dock: Central	8	456	417
Milford: East	9	536	589
Pembroke Dock: Pennar 1	10	580	596

Table 13: Working-age client group - key benefit claimants (February 2007)

	Pembrokeshire (numbers)	Pembrokeshire (%)	Wales (%)
Total claimants	11,720	17.5	19.3
Job seekers	1,360	2.0	2.6
Incapacity benefits	6,640	9.9	11.2
Lone parents	1,290	1.9	2.2
Carers	1,040	1.6	1.4
Others on income related benefits	320	0.5	0.5
Disabled	820	1.2	1.2
Bereaved	240	0.4	0.3

Source: DWP benefit claimants - working age client group

Note: % is a proportion of resident working age people

Income Deprived

4% of Pembrokeshire's LSOA's are within Wales' 10% most income deprived areas in 2005.

3% of Pembrokeshire's LSOA's are within Wales' 10% most income deprived areas in 2008. See previous note regarding the comparison of 2005 with 2008.

Sources

Welsh Index of Multiple Deprivation – Local Authority Analysis Revised 8th December 2005

Welsh Index of Multiple Deprivation – 2008

<http://new.wales.gov.uk/topics/statistics/headlines/compendia2008/hdw20080709/?lang=en>

Nomis – www.nomisweb.co.uk

Poverty and social exclusion - Joseph Rowntree Foundation Research

Research by the Joseph Rowntree Foundation scored the 22 local authority areas in Wales against a range of indicators of poverty and social exclusion. Pembrokeshire was assessed as the most deprived local authority area in Wales in two regards: low pay and tax credits. Other poor scores were in the presence of central heating in residential properties (5th worst), working-age poverty (7th worst – the more poorly performing all being largely urban areas in the Valleys or Swansea), child poverty (9th worst). Pembrokeshire was also 11th worst for childcare places, limiting long-standing illness and premature death.

Source: Joseph Rowntree Foundation, Monitoring Poverty and Social Exclusion in Wales, 2005

Migration

Table 14: Population changes – historical

Pembrokeshire County Council

		2001/2	2002/3	2003/4	2004/5
Births		1090	1150	1160	1200
Deaths		1350	1380	1330	1420
Natural Change		-260	-230	-180	-210
Internal Migration	In	4460	4440	4210	3870
	Out	3510	3480	3440	3290
	Net	950	960	760	580
International Migration (International Passenger Survey)	In	890	660	370	120
	Out	290	300	60	190
	Net	600	360	310	-70

Table 15: Population change by age group

Age Group	Pembrokeshire				Wales			
	1991	2005	Change	% Change	1991	2005	Change	% Change
0 - 15	23,268	22,830	-438	-1.9	589,177	566,678	-22,499	-3.8
16 - 29	20,028	16,779	-3,249	-16.2	567,124	508,448	-58,676	-10.3
30 - 44	22,802	21,736	-1,066	-4.7	582,974	600,723	17,749	3.0
45 - 59	20,303	24,832	4,529	22.3	486,298	590,100	103,802	21.3
60 - 74	18,206	20,531	2,325	12.8	438,521	443,222	4,701	1.1
75+	7,839	10,782	2,943	37.5	208,904	249,419	40,515	19.4
All Ages	12,446	17,490	5,044	4.5	2,872,998	2,958,590	85,592	3.0

Source: ONS, Mid Year Estimates

Source: Needs assessment for PCC Health Social Care and Well-being Strategy

Net migration of 16-24 year olds 1999-2001:
Pembrokeshire: -8.5%

Net migration of 25-44 year olds 1999-2001:
Pembrokeshire: 2.1%

Welsh average for 16-24 year olds: -1.0%
Welsh average for 25-44 year olds: 0.3%

Figure 6: ONS, 2001 Census (Maps 42 and 42a, National SEA of WSP)

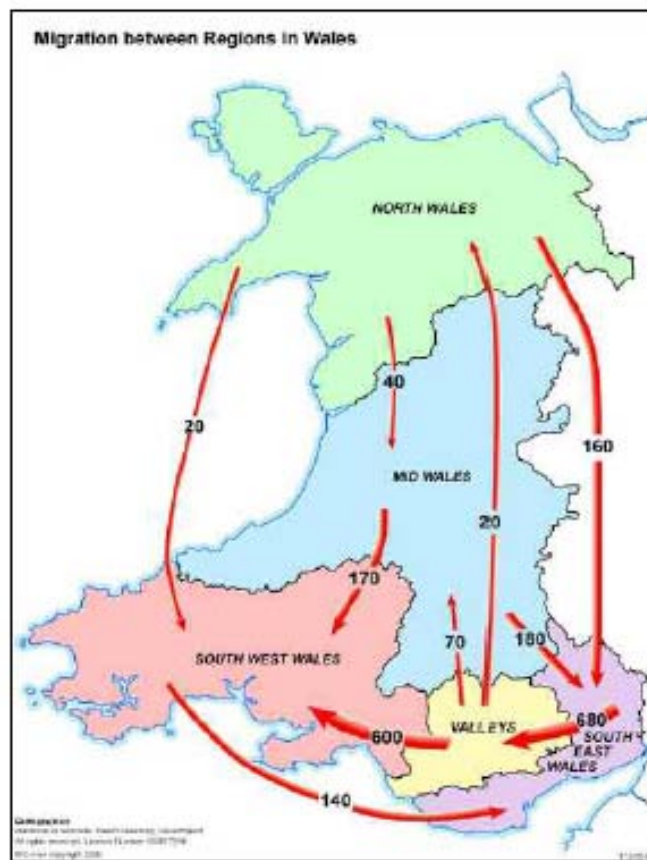


Figure 3J-3: Migration patterns within Wales
(Source: Office for National Statistics – ONS, 2006a)

Trends

Young people are moving out of Pembrokeshire and older/retired people are moving in, causing the population to age and contributing to the expensive housing market.

Sources: WSP – Sustainability and Strategic Environmental Assessment
Scoping Report – Topic J: Population
Pembrokeshire County Council – Draft Local Housing Market Assessment²

² Note that the Local Housing Market Assessment has not been finalised and these figures may be subject to change.

Settlement Pattern

There has been a small increase in the urban population from 52,515 in 1991 to 53,115 in 2001.

Table 16: Distribution of population

Major Settlements (Urban Classification)	% Population 1991	% Population 2001
Fishguard/Goodwick	5,010 7%	5,290 10%
Haverfordwest/Merlin's Bridge	13,345 25%	13,600 26%
Milford Haven/Steynton	13,440 26%	13,100 25%
Narberth	1,910 4%	2,155 4%
Neyland	2,990 6%	3,220 6%
Pembroke	7,170 14%	7,100 13%
Pembroke Dock	8,650 16%	8,650 16%

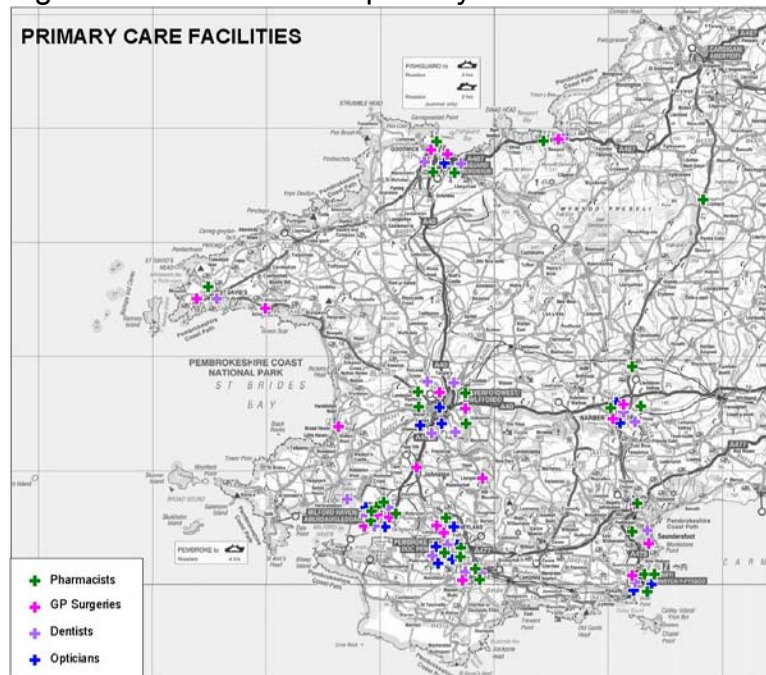
Haverfordwest/Merlins Bridge and Milford Haven/Steynton are the two most populated settlements in Pembrokeshire, both having the highest percentages in completions and land available out of PCC settlements (Table 16).

2. Human health

Health provision in Pembrokeshire

The distribution of primary care facilities in Pembrokeshire is shown on the map below. In all there are 18 general practitioners, 29 pharmacies, 16 opticians and 34 NHS dental practitioners in the County, mainly located in the main towns.

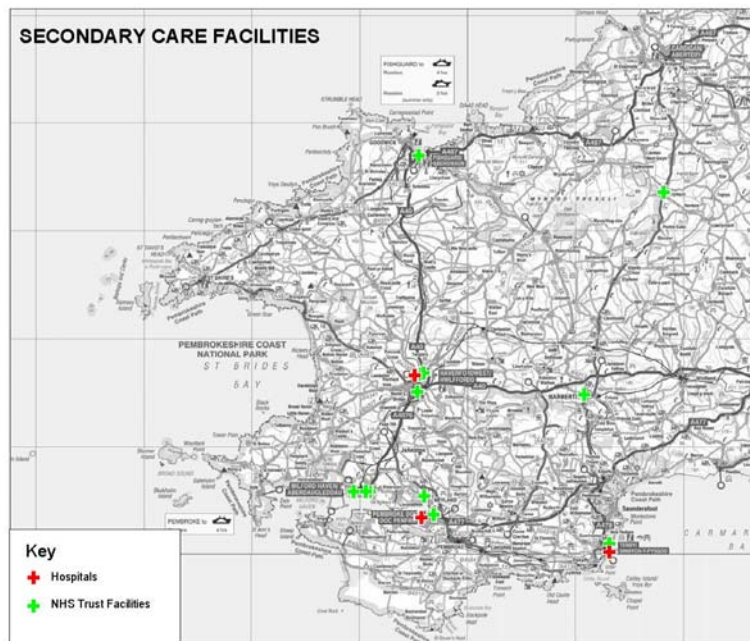
Figure 7a: Distribution of primary care facilities in Pembrokeshire



Source: Health Care and Well-being Strategy 2008-2011 – Needs Assessment Report 2007

Withybush hospital in Haverfordwest is the County's only general hospital, with two smaller hospitals at Pembroke Dock and Tenby. There are ten NHS trust facilities in Pembrokeshire, all shown on the map below (Figure 7b).

Figure 7b: Secondary care facilities



Source: Health Care and Well-being Strategy 2008-2011 – Needs Assessment Report 2007

Sources: Health Care and Well-being Strategy 2008-2011 – Needs Assessment Report 2007

Long term illness

A limiting long-term illness covers any long-term illness, health problem or disability that limits daily activities or work. According to data from the 2001 Census, in the whole of Pembrokeshire there were 25,477 people with a long-term illness, which equates to 22.332% of the population of the County.

Figure 8: Percentage of population with a limiting long-term illness by Local Authority in Wales

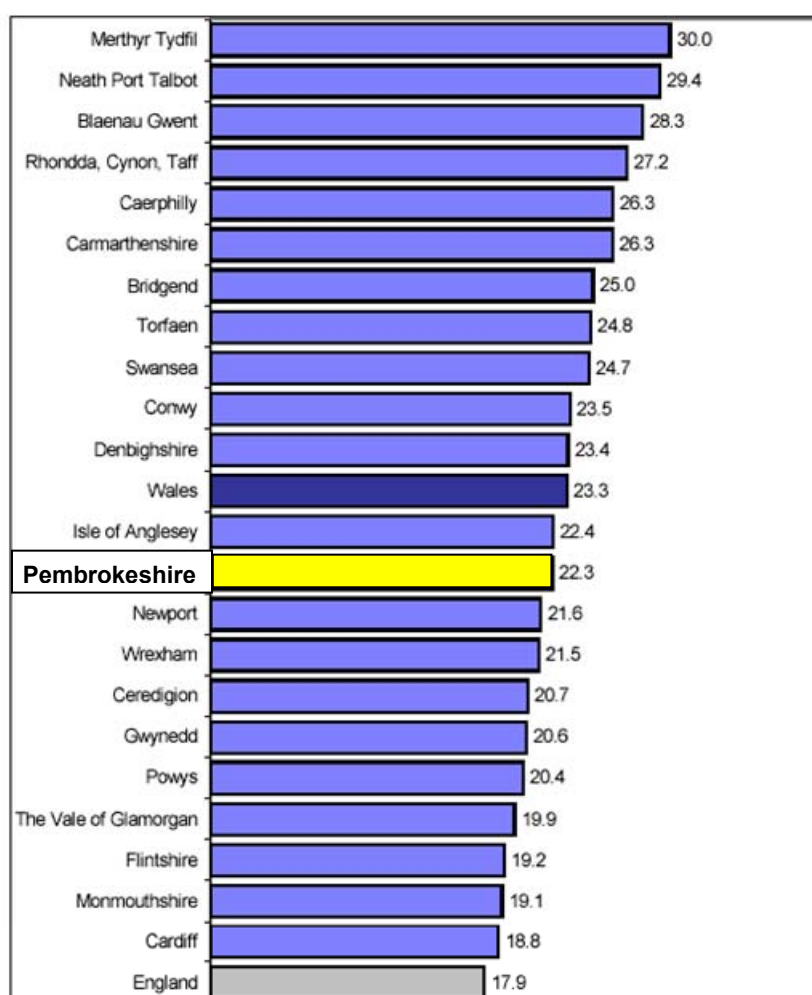


Table 17: Percentage of population with a long-term limiting illness in 1991 and 2001, Pembrokeshire and Wales:

	Pembrokeshire	Wales
1991	14.5%	17.1%
2001	22.3%	23.3%
% Increase	7.8%	6.2%

Source

Office for National Statistics – 1991 & 2001 census data

Obesity levels

Table 18: Adults who were overweight or obese³ in Pembrokeshire in 2003/05 (%)

	Observed			Age-standardised	Unweighted base
	Male	Female	Person	Person	
Pembs	61	51	56	55	1,377
Wales	59	49	54	54	30,634

³ Reported Body Mass Index (BMI) of 25+. BMI is calculated as weight (kg) divided by squared height (m²).

<http://new.wales.gov.uk/docrepos/40382/40382313/statistics/health/health-2006/sb51-2006-pt2.pdf?lang=en>

% of adults who were overweight or obese in 2003/05 = 55%, compared with 54.1% in Wales.

Source: Welsh Health Survey: 2003/05 Local Authority Report, National Assembly for Wales

Table 19: Body mass index by sex and age
Body mass index by sex and age, 2003/04, Wales

<i>Body mass index (kg/m²)</i>	All ages %	16-44 %	45-64 %	65 & over %
MEN				
Underweight (less than 18.5)	2	2	1	2
Healthy weight (18.4 to under 25)	38	44	30	36
Overweight (25 to under 30)	44	38	49	48
Obese (30 and over)	17	15	20	15
% overweight or obese	60	53	69	62
Unweighed sample*	3,578	1,524	1,288	766
WOMEN				
Underweight (less than 18.5)	4	5	1	3
Healthy weight (18.4 to under 25)	48	56	41	44
Overweight (25 to under 30)	30	25	34	35
Obese (30 and over)	18	15	24	17
% overweight or obese	48	39	58	52
Unweighed sample*	4,224	1,774	1,418	1,032

Notes: *Adults aged 16 and over*

** Provisional results*

Source:

Welsh Health Survey: October 2003-March 2004 (provisional results).

<http://new.wales.gov.uk/topics/statistics/headlines/health-2007/health-2006/health-2004/hdw20041118/?lang=en>

www.heartstats.org

More than half (54 per cent) of adults living in Wales are reported as being overweight or obese. The highest proportions are seen to be in the south Wales valleys and Wrexham.

Data supporting the following chart and map can be found in table 27 of the appendix.

Individual opinion on own health

Table 20: Opinion on own health

2001	Pembs	%	Wales	%
Good Health	74921	65.6	1888849	65.1
Fairly Good Health	26413	23.1	652769	22.5
Not Good Health	12797	11.2	361467	12.5
All People	114131	100	2903085	100.0

Source: 2001 Census Data – Neighbourhood Statistics – Local Government Data Unit

The Welsh Health Survey (WHS) based on a sample of the general population asked about 'general health' of adults.

Table 21: % of adults in Wales reporting on their general health

Health in general	%
Excellent	16
Very good	34
Good	29
Fair	16
Poor	6

Source: Welsh Health Survey – 2005/06

The WHS also asked a sample of adults who reported key health-related lifestyles (observed), by the National Statistics Socio-Economic Classification (NS-SEC) of the household reference person.

Table 22: Lifestyle issues

Lifestyle Issue	Pembrokeshire (%)	Wales (%)
Being a smoker	26	27
Consuming alcohol above guidelines limit	38	40
Binge drinking at least 1 day in last week	16	19
Eating 5 or more portions of fruit/vegetables the previous day	43	40
Meeting physical activity guidelines in last week	33	29
Overweight or obese	55	54

Source: Welsh Health Survey: 2003/05 Local Authority Report, National Assembly for Wales

Road collisions & safety

Table 23: Fatal and serious collisions in Pembrokeshire and Wales from 2001-2006.

Road collisions (fatal or seriously injured)	1994-1998 average	2001	2002	2003	2004	2005	2006
Pembrokeshire	90	94	95	93	80	62	78
Wales	1623	1355	1315	1353	1302	1105	1151

Source: Road Casualties Wales: 2006, WAG.

<http://new.wales.gov.uk/topics/statistics/publications/rcw2006/?lang=en>

WAG targets are to reduce the number of killed or seriously injured casualties by 40% by 2010. The 2006 figure is a 13% decrease from the 1994-1998 average.

Source:

Road Casualties Wales: 2006, WAG.

<http://new.wales.gov.uk/topics/statistics/publications/rcw2006/?lang=en>

3. Education and skills

Number of schools and pupils

In Pembrokeshire (**including** the National Park area) there are 66 primary schools (2008), a reduction of 20 since 1998. In additions there are eight secondary schools, one of which provides a Welsh-medium education. Pembrokeshire College in Haverfordwest is the only further education establishment in the County.

Table 24: Pupil numbers in full time primary and secondary education in Pembrokeshire schools

	2003	2004	2005	2006	2007	2008
Primary	10,749	10,545	10,379	10,229	10,128	10,142
Secondary	8,512	8,631	8,714	8,728	8,527	8,361
Total	19,261	19,176	19,093	18,957	18,655	18,503

Source: Annual statutory school census (PLASC returns)

Table 25: Percentage of Pembrokeshire and Wales populations in full time primary and secondary education in 2006/7

	Total population	Primary	Secondary	Total
Pembrokeshire	117,280	8.6%	7.3%	15.9%
Wales	2,965,885	8.5%	7.1%	15.6%

Sources:

National Survey of Adult Basic Skills in Wales, 2004, Welsh Assembly Government

Pembrokeshire County Council School Organisation Plan 2004-2009

Statswales – Welsh Assembly's Statistics for Wales

Further and higher education centres

Pembrokeshire College offers full and part time academic and vocational courses. The College provides HND, HNC and degree level education as an Accredited College of the University of Glamorgan.

Numbers

The college has around 2,000 full-time and 8,000 part-time students and over 700 staff.

Types of courses

A Levels, National Diplomas and NVQ in a wide range of subjects.

HNC and HND in art and design, business, computing, construction, engineering, animal studies, marine studies.

Degrees in business, computing, construction, engineering, health and childcare, marine and leisure boat design.

Source:

Pembrokeshire College website: www.pembrokeshire.ac.uk

Adult education facilities

'Learning Pembrokeshire' is the name for Pembrokeshire County Council's programme of adult education. The Council aims to provide a varied range of courses to suit its customers - Pembrokeshire residents and businesses, both small and large and those on the borders of neighbouring counties.

Courses are run from the Council's Community Learning Centres in all the main County towns, and from many other venues around Pembrokeshire. Schools, village halls, pubs and community venues all host Learning Pembrokeshire courses

Source:

PCC -

http://www.pembrokeshire.gov.uk/content.asp?nav=647,534&parent_directory_id=646

Level of Qualifications

Table 26: Percentage of people aged 16-74 years old highest qualification attained⁴

Highest level attained	Number of individuals (%)	
	Pembrokeshire	Wales
No Qualifications	31.1	33.0
Highest Level 1	16.0	15.5
Highest Level 2	22.2	19.8
Highest Level 3	6.0	7.0
Highest Level 4	17.0	17.4
Other qualification/level unknown	7.7	7.2

Census 2001

<http://neighbourhood.statistics.gov.uk/dissemination/LeadKeyFigures.do?a=3&b=276866&c=pembrokeshire&d=13&e=16&g=415946&i=1001x1003x1004&m=0&r=1&s=1208792814187&enc=1>

Sources:

NOMIS, ONS annual population survey 2006.

⁴ All people aged 16 to 74 who were usually resident in the area at the time of the 2001 Census, whose highest qualification attained:
Level 1: 1+'O' level passes; 1+ CSE/GCSE any grades; NVQ level 1; or Foundation level GNVQ.
Level 2: 5+'O' level passes; 5+ CSE (grade 1's); 5+GCSEs (grades A-C); School Certificate; 1+'A' levels/'AS' levels; NVQ level 2; or Intermediate GNVQ.
Level 3: 2+ 'A' levels; 4+ 'AS' levels; Higher School Certificate; NVQ level 3; or Advanced GNVQ.
Level 4/5 qualifications: First Degree, Higher Degree, NVQ levels 4 and 5; HNC; HND; Qualified Teacher Status; Qualified Medical Doctor; Qualified Dentist; Qualified Nurse; Midwife; or Health Visitor.

Skills and Development Training

In a Future Skills Wales survey, the six most cited skills needed by employers at high or advanced level are:

- | | |
|---------------------------------------|-------|
| 1. An ability to follow instructions | (78%) |
| 2. Communications skills | (74%) |
| 3. An understanding of customer needs | (73%) |
| 4. Adaptability / flexibility | (72%) |
| 5. Team working skills | (69%) |
| 6. The ability to show initiative | (65%) |

These skills were also thought by employers to be the most important skills needed for the future (with minor changes in priority). Only 31% of employers surveyed considered that information technology skills were required at high or advanced level, but this increased to 44% who regarded it as a future skill requirement.

Of the employers surveyed, 19% reported that a significant skills gap existed amongst their employees. Of those reporting a skills gap, 31% of managers believed that a gap in the skills of managers had the most significant impact on their business, and 21% regarded skills gaps amongst skilled trade occupations as having the most impact.

In order to tackle these skills gaps, 56% reported providing further training, 19% reported they would do nothing and 4% reported they would increase recruitment activity. This last finding may suggest that the fear of trained staff being “poached” by rival companies is real, but possibly overstated.

The survey found that 45% strongly agreed that investment in skills brought business benefits with 31% tending to agree. Of these:

- 36% reported competing on customer service as a benefit
- 27% reported competing on quality as a benefit
- 25% reported that investment in skills had increased productivity
- 17% reported increased profits and 17% accelerated business growth
- 9% reported introducing new products or processes
- 6% reported improved staff morale as a result of the investment in skills

A half of those employers who recruited school/college leavers, and 39% of those who recruited graduates identified a significant gap between the skills they had and those the employers expected of them at recruitment:

- 33% reported that school/college leavers lacked the ability to show initiative
- 29% reported a lack of communication skills
- 19% reported a lack of practical skills and knowledge
- 13% reported a lack of ability to follow instructions
- 13% reported a lack of numeric skills

Sources:

Further Education, Work based Learning and Community Learning in Wales
Statistics 2003/04, Welsh Assembly Government
The Future Skills Wales 2003 Generic Skills Survey for Pembrokeshire

Childcare Spaces

On the 31st March 2007, the following childcare spaces were available within the whole of Pembrokeshire:

Type of Care	Number of Spaces
Childminder	546
Sessional Daycare	951
Holiday Playscheme	533
Out of School clubs	72
Breakfast clubs	102
After School Care	601
Holiday Care	384

Source:

PCC Pembrokeshire Cymorth report 06-07 annex 2

4. Transport

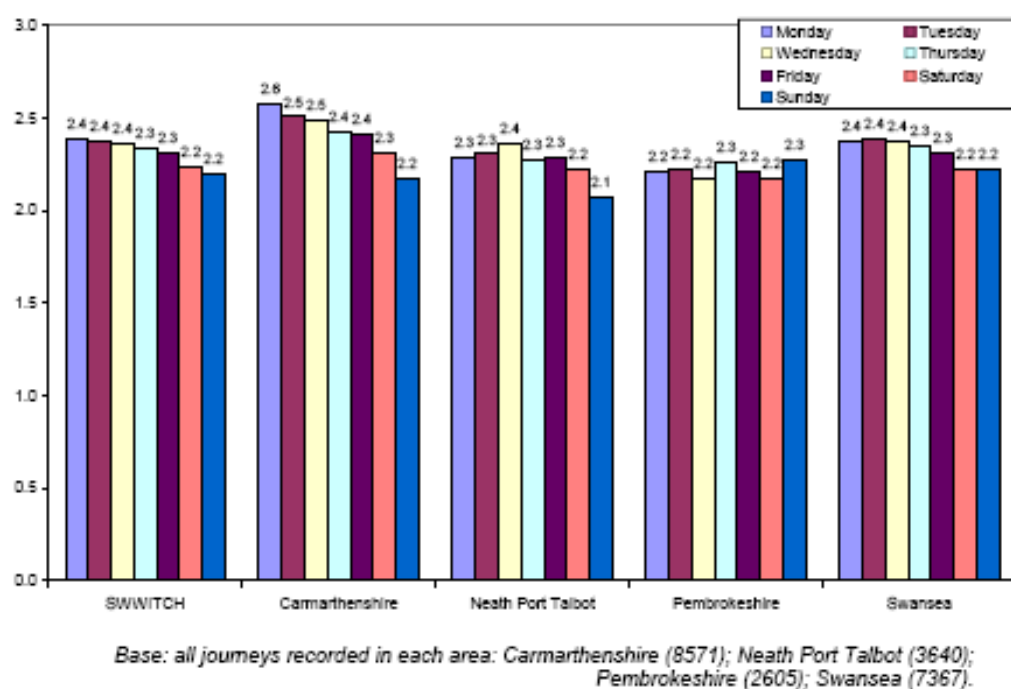
TRAVEL PATTERNS

The following sections summarise information from the South West Wales Integrated Transport Consortium Household Travel Survey (2007) which fed into the development of the Regional Transport Plan. Respondents for the survey totalled 2253 for Pembrokeshire totalled 294.

Number of journeys made (Trip Rate)

Generally, the daily trip rates made by Pembrokeshire respondents were low. However, Pembrokeshire recorded the highest trip rate on Sunday compared to other areas (Carmarthenshire, Swansea and Neath Port Talbot) – this result is potentially influenced by the County's status as a holiday and leisure destination, (Figure 9).

Figure 9: Mean daily trip rate by UA



In Pembrokeshire, those who made the most trips were aged 45-54 (mean 1.5) (Table 27). Respondents aged 75+ were likely to make the fewest trips (mean 1.1). Pembrokeshire respondents who were employed part-time made the most trips (mean 1.9), while the unemployed made the fewest trips (mean 0.8). Males were likely to make the most journeys (mean 1.7) in comparison to females in the area (mean 1.5).

Table 27 - Average number of journeys made by demographic sub groups (Pembrokeshire)

Sub-group	Demographic	Average Journeys/Day	Base size
Gender	Male	1.5	130
	Female	1.2	147
Age	18-24	1.3	24
	25-34	1.3	33
	35-44	1.4	46
	45-54	1.5	46
	55-64	1.4	50
	65-74	1.3	37
	75+	1.1	40
Employment Situation	Full-time employment	1.5	109
	Part-time employment	1.9	28
	Looking after family/home	1.0	89
	Retired	1.7	3
	Student	1.0	21
	Unemployed	0.8	16
Car Ownership	No car	0.9	46
	1+ car	1.5	212

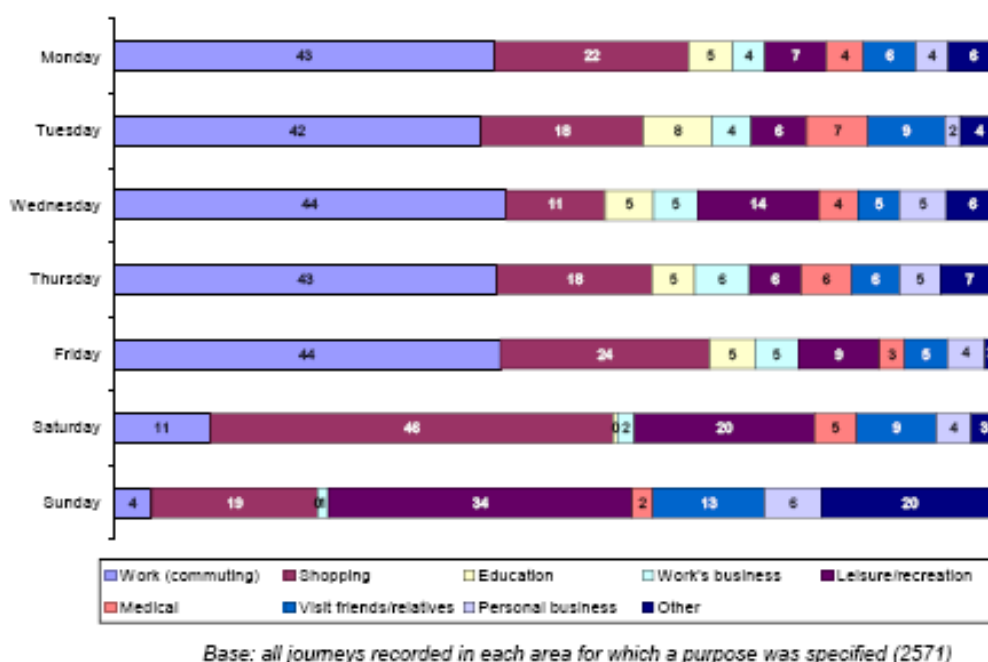
Base: total number of respondents recorded by each group

Journey Purpose

Responses showed that the main journey purpose was for commuting, which accounts for 37% of the total journeys made by Pembrokeshire respondents. This was followed by shopping trips which accounts for 22% of the total journeys made.

Further analysis of journey purpose by day of the week shows that commuting trips made by Pembrokeshire respondents were more likely to be made during weekdays and shopping trips were most likely to be made on a Saturday (46%).

Figure 10 – Journey Purpose by day of the week (Pembrokeshire %)



Modal Split

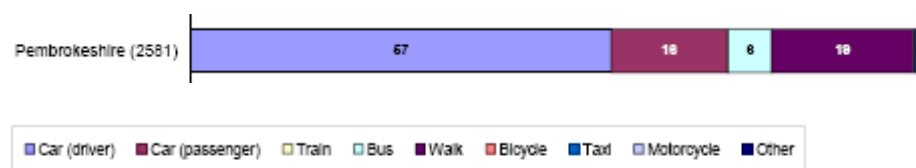
Though respondents were advised not to record any journeys made on foot of less than 50 metres, many journeys involved the use of more than one mode of transport (e.g. a respondent may have walked from their home to the bus stop, caught the bus into town, and then walked to their office). All analysis has been based on the total number of trip stages, i.e. modes used, rather than the total number of journeys made. For SWWITCH area, 21764 modes were used to make 2154615 journeys.

Looking firstly at the SWWITCH study area as a whole, the majority of trips (71% of the total) were made by car (56 % as a driver; 15% as a passenger). The second most popular means of travel was foot (16%). Ten percent of trips were made by public transport (1% by train; 9% by bus). The remaining trips were made by taxi, bicycle and other modes (~1% each).

Pembrokeshire respondents were less likely to travel by public transport (6%) than respondents from other UAs (~10%).

The level of car use in the SWWITCH area is higher than the national average (63%) while level of walking is lower than the national average (25%). Additionally, bus mode share in all the UAs apart from Pembrokeshire is slightly higher than the national average (7%). Levels of cycling (~2%), rail (~1%) and taxi (~1%) use are in-line with the national shares (2%, 2% and 1%, respectively).

Figure 11: Modal split in Pembrokeshire (%)



Base: all modes recorded in each area, as shown
Source of national data: NTS, 2004¹⁶

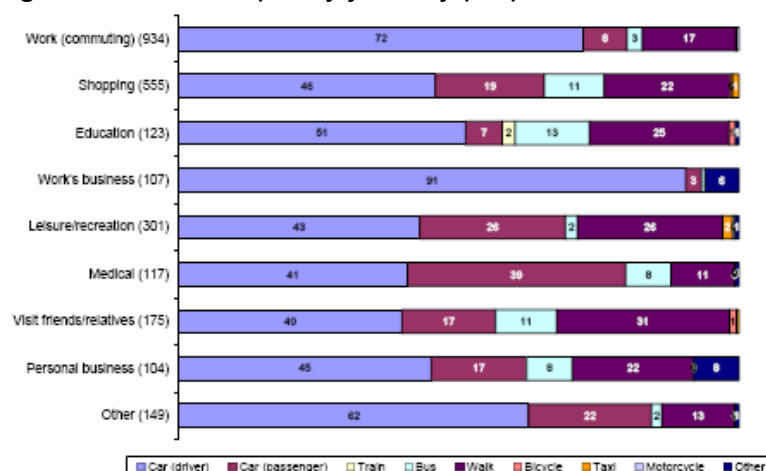
¹⁶ National data sourced from *Trips per person per year by distance and main mode (2004)*, Transport Statistics Bulletin on the National Travel Survey (NTS) 2004 Final Results, Department for Transport, July 2005.

Modal split by journey purpose

Analysis of the modes used for different journey purposes (see Figure 12) shows that the car was the main mode of transport for all types of journeys made, especially work's business trips (86%). While car was still the main mode for education trips (45%), walking mode was also commonly cited at 40%. Shopping trips had the highest public transport mode share (17%) while work's business trips were the least likely to be made by public transport (4%), compared to other types of journeys.

Car mode share of commuting and business journeys (commuting: 81%; work's business: 86%) in SWWITCH is higher than the national average (70%). Work's business and commuting journeys in SWWITCH have a lower level of public transport use (SWWITCH: ~5%; National average: 13%) while conversely, shopping and personal business trips in SWWITCH show a higher proportion of public transport mode share (SWWITCH: 17% and 12%, respectively; National average: 10% and 6%, respectively). Modal split for education and leisure purposes are in-line with the national average.

Figure 12: Modal split by journey purpose in Pembrokeshire (%)

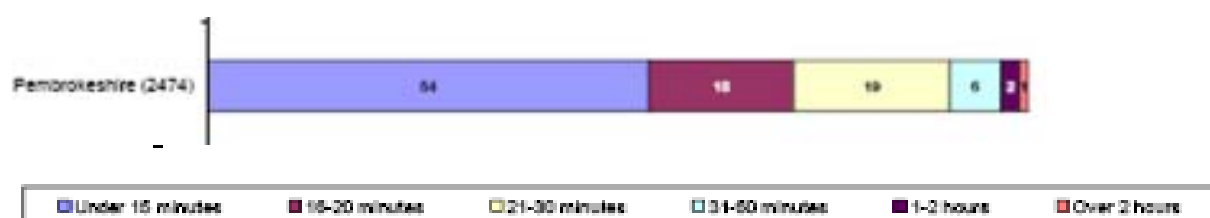


Base: all modes recorded for which a purpose was specified, as shown

Journey Time

Journeys less than 15 minutes long in Pembrokeshire recorded a greater proportion of trips (54%) followed by trips that took 21-30 minutes and those that took 16-20 minutes (19% and 18%, respectively) (Figure 13).

Figure 13: Journey Time



Base: all journeys recorded in each area for which a journey time was specified, as shown

Age

Modal use also varied according to age. In Pembrokeshire those aged 65-74 have the highest car mode shares (90%) and so are the group that are the least car dependent in the area. In general, the youngest and the older respondents displayed considerably lower car mode shares except for those aged above 75 from Pembrokeshire (74%).

Younger respondents in Pembrokeshire were more likely than other age groups to travel by bus. The highest walk mode shares were to be found within the 18-24 age group. Cycling levels were very low for all age groups (~1%). Similarly, the use of taxi was comparatively lower for all (~1%), see Table 28.

Table 28: Modal split by age (%)

Age	Car (driver) (%)	Car (passenger) (%)	Train (%)	Bus (%)	Walk (%)	Bicycle (%)	Taxi (%)	Motor cycle (%)	Other (%)	Base (%)
18-24	36.5	11.6	1.2	15.9	34.9	0.0	0.0	0.0	0.0	233
25-34	49.4	6.0	0.0	3.8	38.6	0.0	0.0	1.7	0.5	307
35-44	63.5	9.3	0.0	5.9	18.5	0.3	0.9	0.0	1.5	452
45-54	76.1	7.4	0.0	1.4	14.8	0.0	0.4	0.0	0.0	465
55-64	55.8	18.3	0.0	5.0	19.6	0.9	0.4	0.0	0.0	494
65-74	64.9	24.7	0.0	2.1	7.1	0.0	1.0	0.0	0.2	339
75+	35.1	38.9	0.0	13.1	8.7	0.0	0.7	0.0	3.6	290

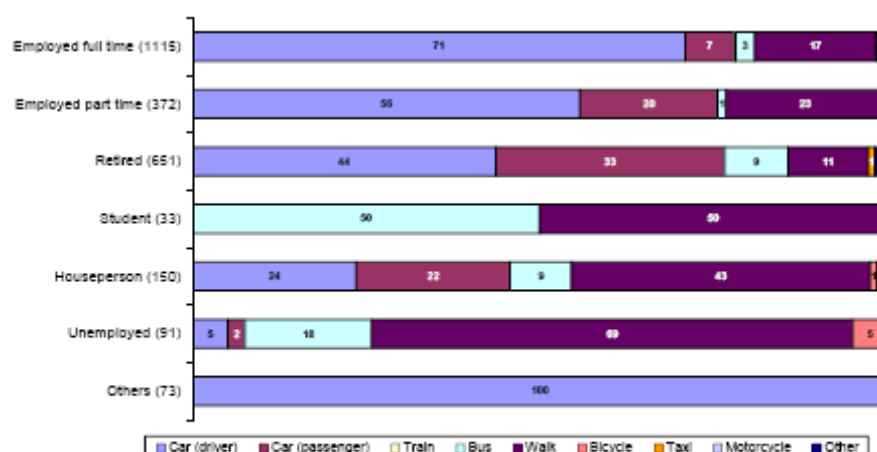
Employment Situation

Analysis by respondents' employment situation shows that within Pembrokeshire as a whole, respondents in full-time employment and status

'other' made the greatest proportion of trips by car (71% and 100% respectively), followed by those in part-time employment (56%), as shown in Figure 14.

Bus and walking were equally popular means of transport for student respondents from Pembrokeshire (both 50%). Cycle mode shares were very low amongst all groups (~1%) except for unemployed respondents from Pembrokeshire (5%).

Figure 14 - Modal Split by Employment Situation (Pembrokeshire, %)

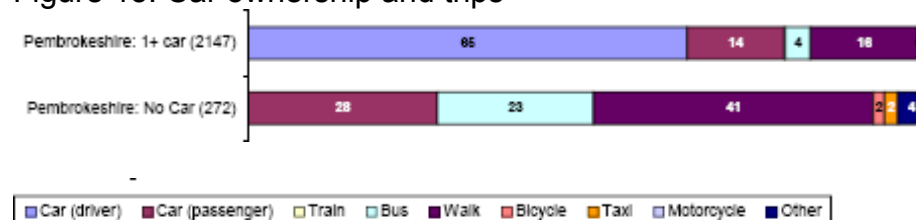


Base: total number of modes recorded by each group, as shown.
Note that there are only 3 student respondents and 5 'other' respondents in Pembrokeshire.

Car Ownership

It is evident from that travel patterns are strongly influenced by car ownership. Respondents in Pembrokeshire from car-owning households made considerably more car trips while those from non-car households made considerably more trips on foot, and by public transport, see Figure 15.

Figure 15: Car ownership and trips



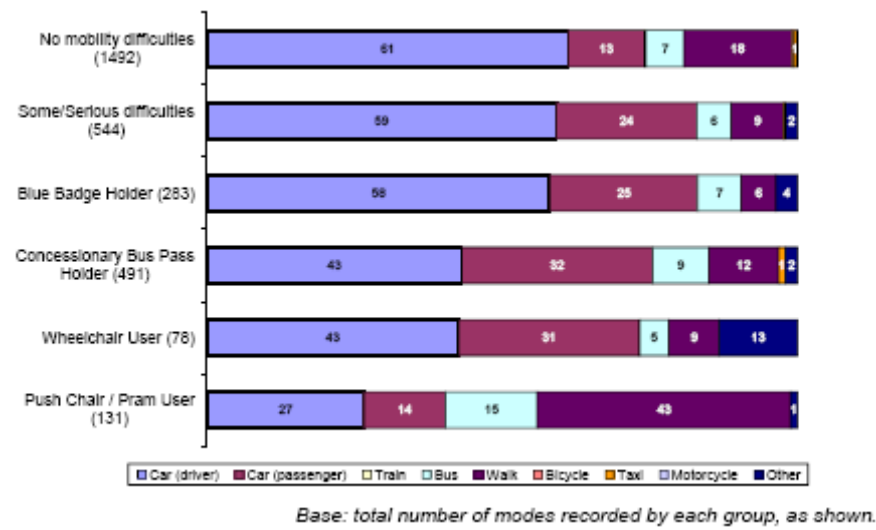
Base: total number of modes recorded by each group, as shown.

Mobility Issues and Difficulties

In Pembrokeshire, the overall proportion of car trips (including travelling as car driver and car passenger) made by respondents with mobility issues was higher than those without any physical difficulties while those without mobility

problems made more walking trips than respondents with mobility difficulties (Figure 16).

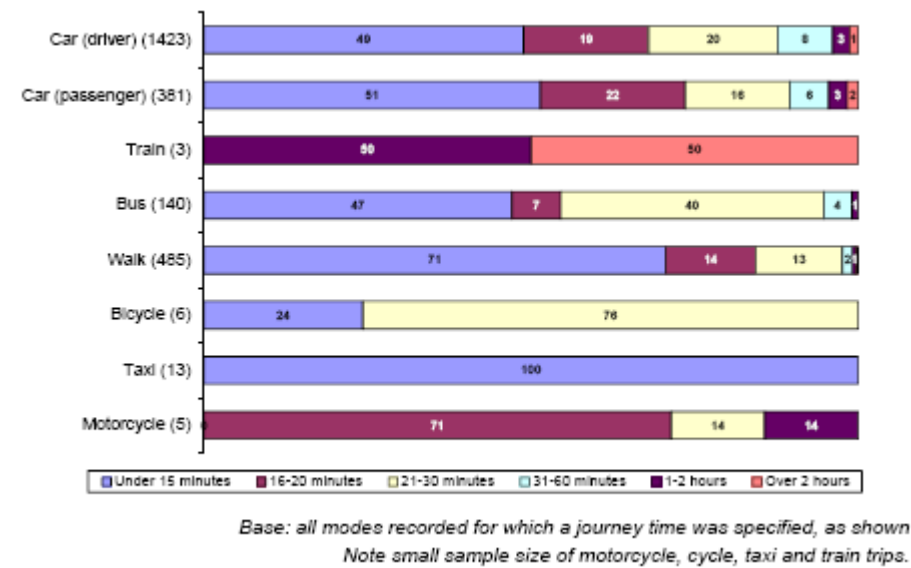
Figure 16 – Modal Split by Mobility Issues and Difficulties (Pembrokeshire, %)



Journey Time by Mode

Analysis of the time taken to travel from origin to destination by different modes in Pembrokeshire shows that the majority of journeys made by foot, car and taxi took less than 15 minutes, except by train in which 58% of all train trips took over an hour. Travelling by train, it was found that 41% of trips took over an hour. Over half of journeys by motorcycle took over 15 minutes (57%).

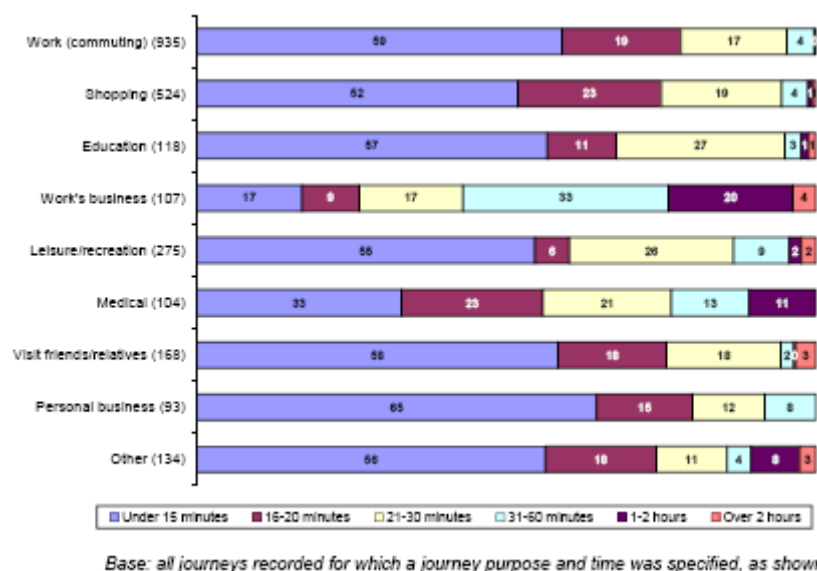
Figure 17 – Journey Time by Mode of Travel (Pembrokeshire, %)



Journey time by purpose

Pembrokeshire residents showed a greater propensity to make journeys of less than 15 minutes than the SWWITCH average, for all purposes other than Work's business and 'medical' (Figure 18).

Figure 18: Journey time by purpose (Pembrokeshire, %)



Car Availability

For all journeys made by modes of transport other than the car, respondents were asked to state whether a car had been available for the journey (i.e. to examine whether they could have travelled by car if they had wanted to). It was found that Pembrokeshire respondents that did not own a car were most likely to travel by taxi (92.8%) or "other" as an alternative mode of transport to the car.

Journey Destinations

It is evident that the proportion of trips made to Pembrokeshire from other destinations was 14% which made it the 4th popular destination out of each of the authorities in the SWWITCH area (see Table 29). Most respondents from Pembrokeshire completed the majority of trips that stayed within Pembrokeshire itself.

Table 29: Most popular destinations

Destination	Frequency	%
Swansea	7889	39.5
Carmarthenshire	5442	27.2
Neath Port Talbot	2888	14.5
Pembrokeshire	2814	14.1
Ceredigion	322	1.6
Cardiff	135	0.7
Powys	131	0.7
Bridgend	81	0.4
Rhondda Cynon Taff	63	0.3

Base: all trips (19976)

Commuting Trips

The destinations of trips were then analysed based on their purpose. 15.2% of commuting trips were made to Pembrokeshire (Table 30). Results also show that 92.6% of Pembrokeshire respondents commuted within Pembrokeshire itself (Table 31).

Table 30: Most popular commuting trip destinations

Destination	Frequency	%
Swansea	2358	37.8
Carmarthenshire	1583	25.4
Neath Port Talbot	1029	16.5
Pembrokeshire	944	15.2
Ceredigion	101	1.6
Cardiff	62	1.0
Bridgend	42	0.7
Powys	36	0.6
Rhondda Cynon Taff	34	0.5

Base: all commuting trips (6231)

Table 31: SWWITCH Survey UA origins and destinations (%)

Origin	Carmarthenshire	Neath Port Talbot	Pembrokeshire	Swansea
Carmarthenshire	82.4	2.3	1.9	3.8
Neath Port Talbot	0.0	65.1	0.8	5.0
Pembrokeshire	0.7	1.1	92.6	0.3
Swansea	9.0	26.0	3.8	86.3
SWWITCH total	92.1	94.5	99.1	95.4
Cardiff	0.9	1.2	0.1	1.3
Bridgend	0.1	2.0	0.0	0.6

Base: all commuting trips (6231)

Shopping Trips

14% of respondents stated that they made shopping trips to Pembrokeshire making it the 4th popular shopping destination (Table 32).

Table 32: Most popular shopping trip destinations (SWWITCH)

Destination	Frequency	%
Swansea	1666	40.2
Carmarthenshire	1165	28.1
Neath Port Talbot	618	14.9
Pembrokeshire	582	14.0
Ceredigion	35	0.8
Powys	35	0.8
Cardiff	11	0.3
Bridgend	8	0.2

Base: all shopping trips (4143)

Leisure and Recreation

14.4% of respondents made trips to Pembrokeshire for leisure and recreation purposes ranking the county as 3rd most popular leisure and recreation destination (Table 33).

Table 33: Most popular leisure and recreation trip destinations (SWWITCH)

Destination	Frequency	%
Swansea	1114	43.9
Carmarthenshire	639	25.2
Pembrokeshire	366	14.4
Neath Port Talbot	279	11.0
Ceredigion	32	1.3
Cardiff	32	1.3
Powys	15	0.6
Bridgend	11	0.4
Gloucestershire	9	0.4
Newport	8	0.3

Base: all commuting trips (2539)

Source of all SWWITCH data:

SWWITCH Household Travel Survey Final Report 2006/2007

Road traffic

Table 34: Volume of traffic on major roads by Unitary Authority (billion vehicle km)

Area	2002	2003	2004	2005	2006
<i>Pembrokeshire</i>	<i>1.00</i>	<i>1.02</i>	<i>1.03</i>	<i>1.05</i>	<i>1.09</i>
Carmarthenshire	1.72	1.75	1.76	1.79	1.86
Ceredigion	0.69	0.71	0.72	0.71	0.72
WALES	26.20	26.59	27.31	27.28	27.85

These figures show that there is an annual gradual rise in volume of traffic, both in Pembrokeshire and through Wales. Traffic in Pembrokeshire accounted for 3.9% of traffic on major roads in Wales in 2006.

Source:

Stats Wales, accessed January 11th 08

<http://www.statswales.wales.gov.uk/TableViewer/tableView.aspx?ReportId=3891>

Households without a car

The percentage of households without a car or van in the whole of Pembrokeshire, as measured in the 2001 census:

Pembrokeshire 21.7%

Carmarthenshire 23.1%

Ceredigion 19.5%

Wales 26.0%

Source:

Census 2001, Car or Van table KS17

<http://www.neighbourhood.statistics.gov.uk/dissemination/LeadTableView.do?a=3&b=276866&c=pembrokeshire&d=13&e=15&g=415946&i=1001x1003x1004&m=0&r=1&s=1209389986000&enc=1&dsFamilyId=51>

Travelling to work

Table 35: The method of travel to work used by all employed persons aged 16-74, in the whole of Pembrokeshire and Wales (2001):

Method of travel	Pembrokeshire		Wales	
	Number of persons	% of employed persons	Number of persons	% of employed persons
Driving a car or van	25,793	57.45%	726,363	61.23%
Passenger in a car or van	3,672	8.18%	106,526	8.98%
Train	169	0.38%	14,619	1.23%
Bus, coach or mini bus	1,353	3.01%	62,322	5.25%
Bicycle	364	0.81%	16,389	1.38%
On foot	5,190	11.56%	122,732	10.35%
Motorcycle, scooter or moped	332	0.74%	8,888	0.75%
Taxi	199	0.44%	5,975	0.50%
Other	448	1.00%	7,119	0.60%
Work at home	7,377	16.43%	115,323	9.72%
Total (all people aged 16-74 in employment)	44,897	100%	1,186,256	100%

Census data 2001, KS15 -Travel to work table

65.6% of the resident population aged 16-74 years drive a car to work or are a passenger in a car to work compared with 70.2% for Wales (Census, 2001).

Source:

Census, 2001

<http://www.neighbourhood.statistics.gov.uk/dissemination/LeadTableView.do?a=3&b=276866&c=pembrokeshire&d=13&e=15&g=415946&i=1001x1003x1004&m=0&r=1&s=1209388884375&enc=1&dsFamilyId=283>

Rail travel & links

Figure 18 indicates the rail infrastructure in Pembrokeshire (red line) and the passenger ferry terminals in the County (blue triangles). Commercial services provided by Arriva Trains Wales run approximately every two hours to Milford Haven and Pembroke Dock and twice a day to Fishguard Harbour on

weekdays. The weekend timetable is significantly reduced. The infrastructure also extends to existing/disused large industrial sites at Milford Haven, Waterston and Trecwn.

Figure 18: Rail links and passenger ferry terminals

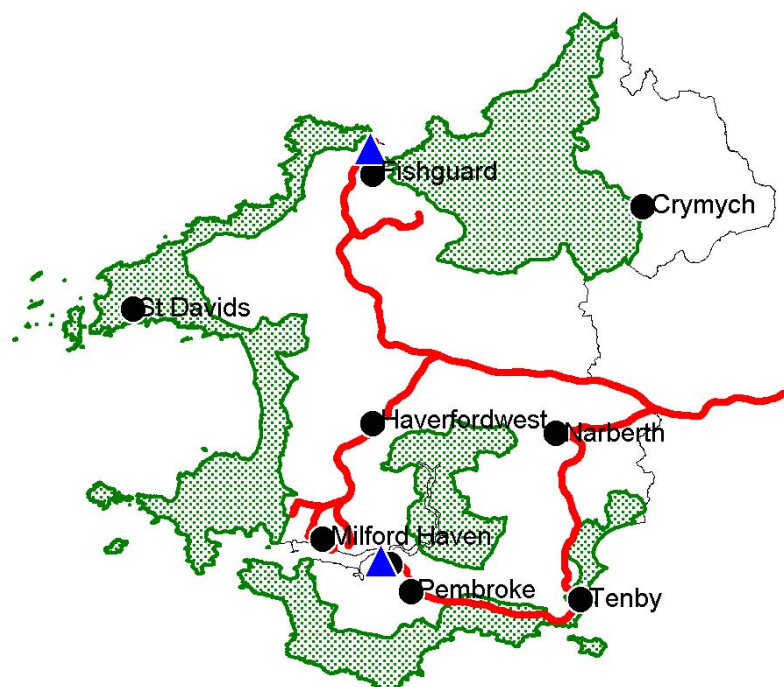


Table 36: Passenger numbers with a valid ticket beginning and/or ending their journey at Pembrokeshire train stations in the financial year 2005/06:

	Passenger numbers	Ranking (of all Wales & England stations)
Haverfordwest	114,021	1153
Tenby	76,695	1311
Milford Haven	39,750	1541
Pembroke Dock	30,056	1623
Fishguard Harbour	28,303	1641
Pembroke	21,477	1732
Clunderwen	12,709	1859
Narberth	10,321	1897
Kilgetty	7,794	1938
Johnston	6,974	1955
Saundersfoot	4,560	2003
Penally	4,339	2008
Manorbier	4,265	2011
Clarbeston Road	3,011	2044
Lamphey	2,646	2054
.....		
Carmarthen	295,860	727
Cardiff Central	8,403,835	24
London Waterloo	66,342,182	1

Future Trend

In Network Rail's investment programme for 2008-2010, Pembrokeshire has not been earmarked as the recipient of any substantial engineering projects.

Source:

Pembrokeshire County Council – Geographical Information Systems map layers

Network Rail – 20th February 2008 -

<http://www.networkrail.co.uk/asp/3851.aspx>

Department for Transport – Station Usage Report, published 29 March 2006 -

<http://www.dft.gov.uk/transportforyou/access/rail/railstations/ssf/stationusage>

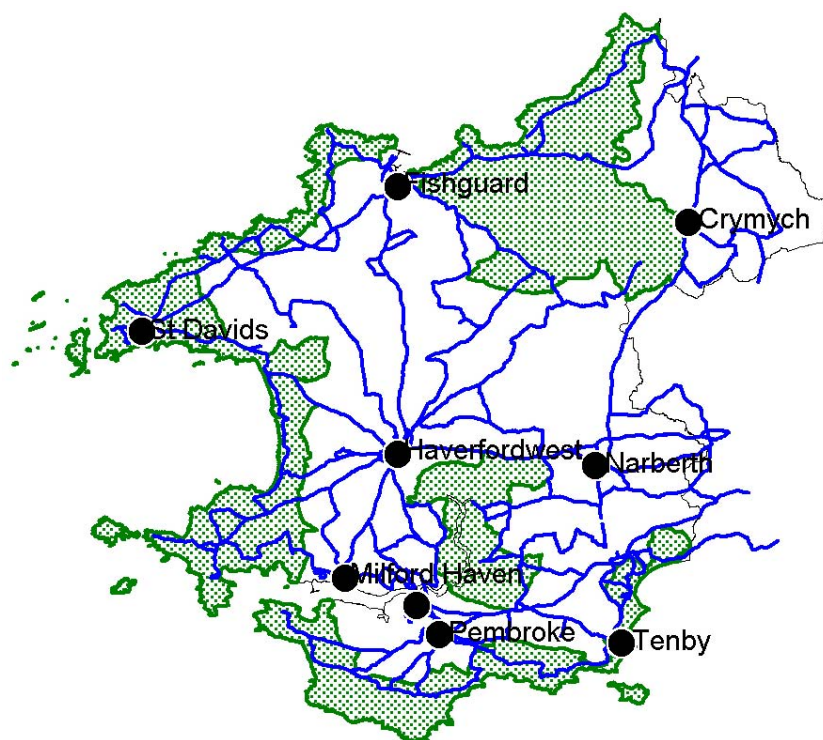
Arriva Trains Wales – Timetable 3, West Wales to Cardiff

Bus Routes

Blue lines indicate public bus service routes (Figure 19). 74% are PCC subsidised services with First Cymru operating two large routes. Haverfordwest is the central hub as the County town and can be reached directly from most areas of the County.

'Dial a bus' schemes have been set up in areas of weak provision, for example the Preseli Green Dragon scheme in rural North East Pembrokeshire.

Figure 19: Public bus service routes



In 2006/07 the aggregate number of journeys made by public transport in Pembrokeshire was 1,444,636 passengers.

SOURCE

Pembrokeshire County Council – Geographical Information Systems map layers

Use of different modes of travel

- a) Frequency of travel by various modes
- b) Reasons for use

Bus

58% of respondents in Pembrokeshire stated that they never use the bus. 35% of respondents stated that they would travel by bus for convenience whilst 15% of respondents highlighted fast journey times as a reason for using the bus.

Rail

80% of respondents in Pembrokeshire stated that they never travel by rail. The most popular reason for using the train according to respondents in Pembrokeshire was due to the difficulty/cost of parking. Only just over 7% of respondents provided fast journey time as a reason to use the train.

Foot

52% of respondents in Pembrokeshire stated that they frequently used walking as a mode of transport however 37% said they never used walking as a mode of transport. Only 7% of respondents provided environmental concerns as a reason for walking.

Cycle

Pembrokeshire showed the least number of respondents cycling, with 93% stating that they never use cycling as a mode of transport, Figure 6.4. 28% of respondents stated that health/fitness as a reason for cycling. In Pembrokeshire, health/fitness and convenience were the most popular reasons for cycling.

Car driver

One third of respondents in Pembrokeshire stated that they never drive a car as a mode of transport. However it is important to note that very few respondents in Pembrokeshire drive a car on an infrequent or occasional basis – the vast majority of respondents either drive a car frequently or not at all (33%). Convenience (>50%) and fast journey times were the most popular reasons for driving a car as a mode of transport.

Car passenger

Just over half of respondents (51%) of respondents frequently travelled as a car passenger in Pembrokeshire. It is important to note that there were a greater percentage of respondents that travelled as a car passenger on an occasional or infrequent basis than the percentage of respondents that drove a car occasionally or infrequently.

School Travel Patterns

Age of Children

51% of children were listed as in secondary education in Pembrokeshire. Only 39% were listed as in primary education in the area.

Distance Travelled

In Pembrokeshire over a half of children travelled more than 3 miles to get to their school. Just over a third (35%) of all children in Pembrokeshire travelled less than 1 mile to school.

Mode of travel

Travel to school in Pembrokeshire was fairly evenly split between walking and the bus with 43% and 42% of children respectively using these modes.

Age by mode of Travel varied considerably according to the age of the children e.g. the tendency to travel to school on foot decreased as the age of children increased. Distance by Mode of Travel varied e.g. the proportion of children walking to school decreased as the distance travelled increased.

Source: [SWWITCH Household Travel Survey 2006/2007](#)

Sea passenger movements

Table 37: Annual number of ship arrivals, by port in Pembrokeshire

	2001	2002	2003	2004	2005
Fishguard	1,155	1,125	1,162	9,87	1,109
Milford Haven*	3,088	3,224	3,456	3,456	3,360
WALES	10,477	10,379	1,1027	10,252	9,890

* Milford Haven includes the ports of Pembroke Dock and Milford Haven

Table 38: Sea Passenger movements to/from Ireland:

	2001	2002	2003	2004	2005
Fishguard	687,000	662,000	645,000	614,000	590,000
Pembroke Dock	388,000	387,000	384,000	378,000	321,000
WALES	3,581,000	3,585,000	3,528,000	3,381,000	3,185,000

The figures show that sea travel is declining, both in numbers of passengers and ships in the County and throughout Wales. With regard to sea passenger numbers, it is a reflection of cheaper airfares and arguably, poor road and rail infrastructure connecting the ports.

Milford Haven is bucking the trend by securing increasing annual ship arrivals, confirming itself as Wales's busiest port ahead of Holyhead. The LNG development will see Milford Haven experience further growth in ship arrivals.

Milford Haven Port Authority which includes Pembroke Dock is the busiest port in Wales with 3360 ship arrivals in 2005. While sea travel to and from Ireland is declining in terms of numbers of passengers there has been an increase in freight. This increase in freight has major implications for the transport network.

Source:

Statswales website:

Ship arrivals <http://www.statswales.wales.gov.uk/TableViewer/tableView.aspx>
Sea passengers

<http://www.statswales.wales.gov.uk/TableViewer/tableView.aspx?ReportId=3954>

Air transport

Haverfordwest Airport has an annual total air transport movement of approximately 7,000 - 8,000 passengers. There are no scheduled flights; these numbers represent private flying, club flying, air ambulance, and some air taxi.

Source:

Development of an Air Transport Strategy for Wales, Final Report, Stage 2 – Welsh Airports Infrastructure Appraisal, A report for the Welsh Assembly Government, December 2003, Avia Solutions.

http://wales.gov.uk/docrepos/40382/4038231141/403821125/403821125/639095/640175/report2_part2.pdf?lang=en

Car Parking

There are over 120 car parks throughout the County, of which the County Council operates 80. Other providers include Pembrokeshire Coast National Park Authority, the National Trust, supermarkets and so on. The vast majority are located adjacent to either retail centres or beaches.

Source: Pembrokeshire County Council

Trunk Roads/Length of Highways

Table 39: The County's highway network comprises the following classifications and distances:

Class of Highway	Length (km)	%
Trunk Roads	118.8	5
A Roads	152.3	6
B & C Roads	1190	48
Unclassified	1028	41

Source: Pembrokeshire County Council

Trunk roads in the County form strategic routes into Pembrokeshire from the east and north, and are the responsibility of the National Assembly with Carmarthenshire County Council acting as its agent, and Powys and Ceredigion County Councils. These routes in Pembrokeshire include:

- The A40(T) (from the County boundary at Whitland towards Fishguard);
- The A477(T) (from the County boundary east of Llanteg to Pembroke Dock);
- The A4076(T) (from Haverfordwest to Milford Haven);
- Part of the A487(T) (between Fishguard and Cardigan).

Source:

Advance Rural Development Plan 2007-2013, Part D

Trunk road agency websites (<http://www.midwales-tra.gov.uk/index.php?id=10&L=0> and <http://www.swtra.co.uk/>)

5. Social Fabric

Housing

Housing Stock

Table 40 and 41: Dwelling stock estimates by tenure in Pembrokeshire and Wales, 2004 and 2005

2004	Rented from local authorities	Rented from registered social landlords	Owner-occupied, privately rented and other tenures	Total
Pembrokeshire	5,980	1,932	46,127	54,039
% of total dwelling stock	11%	3.6%	85%	
Wales	162,276	64,295	1,069,229	1,295,800
% of total dwelling stock	12.5%	5%	82.5%	

2005	Rented from Local Authorities	Rented from registered social landlords	Owner occupied, privately rented and other tenures	Total
Pembrokeshire	5,881	2,002	46,592	54,475
% of total dwelling stock	10.8%	3.7%	85.5%	
Wales	157,516	65,009	1,083,132	1,305,657
% of total dwelling stock	12.1%	5.0%	83.0%	

Source:

National Assembly for Wales: Key Publications: Housing statistics in Wales

Stock breakdown

Table 42: Pembrokeshire's housing stock, by Travel to Work Area (TTWA)

	Privately owned or rented		Social housing	
	Quantity	Percentage of stock in TTWA	Quantity	Percentage of stock in TTWA
Fishguard & St Davids	5,112	86	855	14
Haverfordwest	18,495	80	4605	20
Pembroke & Tenby	13,129	82	2796	18
Cardigan	3,050	93	246	7
Pembrokeshire	39,786	82	8502	18

Data Gaps and Uncertainties

Previous year's data, rate of stock increase.

Source:

Pembrokeshire Draft Local Housing Market Assessment 2007

Table 43: Housing Condition

Tenure Key Attribute	Owner	Council Tenant	RSL Tenant	Private Tenant	All Tenures
Home in Good Condition	93%	75%	92%	73%	89%
Roof Insulated	86%	84%	93%	64%	85%
Heating Satisfactory	86%	57%	86%	62%	81%
Home with Damp or Condensation	32%	61%	34%	60%	38%
External Walls Insulated	35%	21%	64%	18%	33%
Floors Insulated	15%	4%	29%	9%	14%
Insulation works within the last 12 months	5%	8%	8%	3%	5%

Source:

Pembrokeshire County Council Draft Local Housing Market Assessment

Table 44: Housing Need All Pembrokeshire – Current Need

C: Current Need	
1. Existing households in need of alternative housing ⁵	3330
2. <i>Plus</i> Current non-households in need	198
3. <i>Minus</i> cases where they can afford to meet their needs in the market	Nil
4. TOTAL CURRENT HOUSING NEED	3528
A: Available Stock to Offset Need	
5. Current occupiers of Affordable Housing in Need	832
6. <i>Plus</i> surplus stock	Nil
7. <i>Plus</i> committed supply of new affordable housing units	129
8. <i>Minus</i> planned units to be taken out of management	97
9. <i>Equals</i> Total available stock to meet current need	864
10. TOTAL CURRENT NEED	2664
11. <i>Times</i> quota to progressively reduce levels of current need	5%
12. <i>Equals</i> ANNUAL NEED TO REDUCE LEVEL OF CURRENT NEED	133.2
N: Newly Arising Need	
13. New Household Formation (gross per annum)	446
14. <i>Times</i> proportion of households unable to buy or rent on the market	55.47%
15. <i>Plus existing households falling into need</i>	1376*
16. <i>Minus potential out- migrants unable to afford market housing</i>	Nil
17. <i>Plus in-migrants unable to afford market housing</i>	Nil
18. <i>Equals newly arising need</i>	1623*
S: Supply of Affordable Housing Units per year	
19. <i>Net Supply of social re-lets</i>	350
20. <i>Plus supply of intermediate housing available for re-let / resale at submarket levels</i>	Nil
21. <i>Equals Affordable Supply</i>	350
NET SHORTFALL OR SURPLUS	
22. <i>Overall shortfall or surplus</i>	1406

Source: Draft Local Housing Market Assessment

⁵ Includes 30 persons on the register not currently living in Pembrokeshire

House Prices

Table 45: Affordability of Housing (2005)

	Mean House Price	Mean Household Income	Affordability (house price/income)
Pembrokeshire	£152,986	£25,591	5.98
Rural Wales	£158,662	£26,803	5.92
Wales	£143,810	£27,328	5.26

The affordability ratio in Pembrokeshire has increased by 1.75 units, i.e. 29.33% from 2003 to 2005.

The number of second / holiday homes recorded in Pembrokeshire in the 2001 Census was 6.1% which had remained unchanged following the 1991 Census (this is for the whole County, what is this for the area excluding the national park).

Table 46: Lower Quartile Price for all Types and Sizes of Housing 2001-06

Year	2001	2002	2003	2004	2005	2006
TTWA						
Cardigan	£45,500	£58,000	£74,500	£100,000	£111,500	£125,000
Fishguard and St David's	£52,250	£64,000	£78,000	£97,500	£120,000	£134,000
Haverfordwest	£41,050	£50,063	£67,125	£92,000	£107,250	£120,000
Pembroke and Tenby	£43,375	£54,438	£73,250	£92,500	£110,000	£124,613

Table 47: Median price for all types and sizes of housing 2001 to 2006

Year	2001	2002	2003	2004	2005	2006
TTWA						
Cardigan	£60,000	£77,000	£115,000	£147,500	£145,500	£165,000
Fishguard and St David's	£79,950	£91,000	£121,250	£145,000	£166,250	£183,975
Haverford west	£54,000	£73,610	£90,500	£129,500	£137,500	£150,000
Pembroke and Tenby	£63,000	£85,000	£105,000	£137,500	£148,500	£160,000
Average	£64,237.50	£81,652.50	£107,937.50	£139,875.00	£149,437.50	£164,743.75

Table 48: Lower quartile prices by type in 2006

TTWA	Detached	Semi-detached	Terraced	Flat
Cardigan	£165,000 (228)	£118,250 (92)	£104,750 (80)	-
Fishguard and St David's	£181,875 (100)	£123,000 (69)	£122,750 (63)	-
Haverfordwest	£170,000 (370)	£119,963 (266)	£111,000 (284)	£77,000 (33)
Pembroke and Tenby	£172,000 (275)	£124,963 (166)	£110,000 (194)	£88,750 (83)

[Number of sales in brackets () - denotes fewer than 10 sales]

Table 49: Median prices by type in 2006

TTWA	Detached	Semi-detached	Terraced	Flat
Cardigan	£202,000 (228)	£137,500 (92)	£120,500 (80)	-
Fishguard and St David's	£234,000 (100)	£155,000 (69)	£145,000 (63)	-
Haverfordwest	£210,000 (370)	£137,250 (266)	£125,000 (284)	£85,000 (33)
Pembroke and Tenby	£210,000 (275)	£146,500 (166)	£130,000 (194)	£115,000 (83)

[Number of sales in brackets () - denotes fewer than 10 sales]

House Price to Income Ratio, Wales 2005

Table 50: The following figures relate to the 'typical' first time buyer market

Local Authority area	Income ¹	House price ²	Ratio
Pembrokeshire	£23,332	£136,807	5.86
Powys	£25,998	£144,459	5.56
Cardiff	£31,496	£158,322	5.03
Ceredigion	£28,705	£138,175	4.98
Denbighshire	£26,432	£129,903	4.91
Vale of Glamorgan	£26,432	£143,963	4.58
.....			
Merthyr Tydfil	£29,772	£83,111	2.79

Chartered Institute of Housing Cymru, 2005

¹ - earned income ratios for working households aged 20-39

² - average house prices for 2/3 bedroom dwellings

Trends

House prices both nationally and in Pembrokeshire are increasing, however the housing market in some areas of the UK is slowing down.

Pembrokeshire has a more expensive housing market than the national average.

Comparators

National Average House Price 2006 – £148,718

2003 – £98,186
2002 – £79,397

The national average increased by 23.66% between 2002 and 2003

Pembrokeshire was the second least affordable rural local authority in Wales at spring 2006 at 6.5 times the average earnings of the County (behind Powys at 6.9 times average earnings).

Data Gaps and Uncertainties

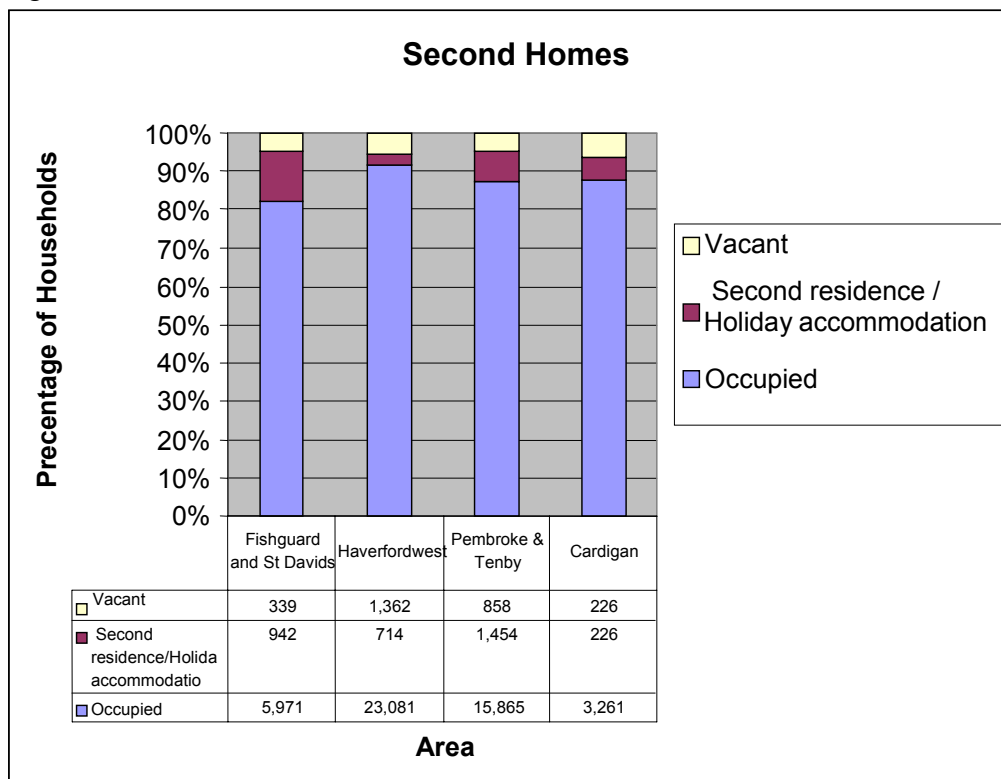
National Data for: House price by type pre-2002
House price by number of bedrooms

Sources:

Welsh Rural House Price Index Spring 2006
Pembrokeshire County Council Draft Local Housing Market Assessment
Pembrokeshire County Council Local Housing Strategy
National Assembly for Wales: Key Publications: Housing statistics in Wales
Chartered Institute for Housing Cymru – *Young, Working and STILL Homeless*.
Housing market affordability in Wales in 2005

Second and Holiday Homes/Number and proportion of Vacant Dwellings

Figure 20: Tenure at 2001



Data Gaps and Uncertainties

National data for proportions of vacant dwellings - second and holiday homes.

Previous years' data for second and holiday homes.

Source:

Pembrokeshire County Council Draft Local Housing Market Assessment

Table 51: Affordable Housing – Current Need

S: Supply of Affordable Housing Units per year	
23. Net Supply of social re-lets	350
24. Plus supply of intermediate housing	Nil
25. available for re-let / resale at submarket levels	
26. Equals Affordable Supply	350
NET SHORTFALL OR SURPLUS	
27. Overall shortfall or surplus	1406

The application of this formulaic approach to assessing housing shortfall surplus indicates the following shortfall of affordable housing over the four areas:

- All Pembrokeshire Shortfall of 1406 units per annum

Pembrokeshire County Council currently requires all large housing developments to provide 20% as affordable housing. Future aspirations aim to increase this percentage requirement to 30%, after failing to meet demand.

Table 52 shows how many properties will need to be delivered per annum factoring in a range of quotas for “All Pembrokeshire”.

Table 52: Annual Delivery of Units for Different Quotas

Step 11 Quota (%)	Number of years to address existing need	Number of dwellings to be provided
5	20	1406
10	10	1539
15	6.6	1672
20	5	1806
25	4	1939
30	3.3	2072
35	2.8	2205
40	2.5	2338
50	2	2605

Source: Draft Local Housing Market Assessment (2007)

This evidence of demand for affordable housing provided by the draft Local Housing Market Assessment for Pembrokeshire was produced following Welsh Assembly Government Guidance. This draft will be published as a final version later in 2008 and will be amended to take account of up to date population projections, therefore these figures should be treated with caution. Using housing waiting list data and following a prescribed methodology for identifying affordable housing need it identified a need for 1539 affordable houses a year over a 10 year period. This would meet both newly arising need and the backlog of existing need for the County including the Pembrokeshire Coast National Park area. This figure is extremely high, the bulk of which is made up of the backlog of need. Authorities across Wales are finding similarly extreme figures and there is some concern over the

methodology. Nevertheless affordable housing need is likely to be high because of a number of factors including the sale of council housing and rising house prices. However when deciding on the overall housing requirement, and the proportion that should be affordable, the capacity of infrastructure to accommodate development needs to be taken into account and the ability of the construction industry to deliver. The requirement must be achievable.

Using the lower quartile house price within each area a net annual income of between £31,000 and £35,000 is needed to purchase and incomes are predominantly below this.

Private rented properties can cost up to £650 per month with an income of £26,000 needed to support the monthly payments.

Second and holiday homes are an issue in certain parts of the area, mainly in coastal areas. The lowest percentages are shown in Haverfordwest and the highest in the Fishguard and St Davids areas. Within individual communities, percentages can be as high as 20% or more, particularly if the area is also a very attractive retirement location. (Pembrokeshire Health Care and Well-being Strategy 2008-2011 – Needs Assessment Report 2007).

Sheltered Housing

% Housing Stock: Social Rented = 14.7%
Privately Rented/Owned = 85.3%

Table 53: Social Rented Stock at January 2006 by Travel To Work Area

Travel to Work Area	Pembrokeshire County Council	Pembrokeshire Housing	Cymdeithas Tai Cantref	Cymdeithas Tai Dewi Sant	Total
Cardigan	105	0	74	0	179
Fishguard / St Davids	524	64	215	0	803
Haverfordwest	3294	721	5	122	4142
Pembroke / Tenby	1881	659	0	109	2649
Total Properties	5804	1444	294	231	7773

Pembrokeshire County Council = 74.7%
Pembrokeshire Housing Association = 18.6%
Dewi-Sant = 3.8%
Tai Cantref = 3.0%

Energy efficiency of housing

There is little detailed data on the efficiency of housing. The Welsh Assembly Government contributes to the Home Energy Efficiency Scheme (HEES) which provides grants to households which meet specific criteria.

Housing Land Availability

Table 54: Housing units with planning permission and allocated in 2007

Housing Units September 2007	With Planning Permission	Allocated	Total
Pembrokeshire	3461	4505	7966
Urban	1761	3385	5146
% Urban	50.8%	75.1%	64.6%

Urban Classification: Those permissions/allocations within the boundaries of the major settlements of:

Haverfordwest/Merlins Bridge
Milford Haven/Steynton
Fishguard/Goodwick
Pembroke, Pembroke Dock
Neyland
Narberth

Trends

The majority of housing land is located in the major settlements of Pembrokeshire.

Source: Pembrokeshire County Council

Table 55: Current allocations for housing

	Number of units*
A. Under construction	448
B. Not started	7233
C.= Total (A+B)	7681
D. Annual average completions	470
E. Completions 2007-2011(Dx4)	1880
F. Residual Commitments AT 2011 (C-E)	5801
G. Annual commitment to 2021 (F/10)	580.1

*This was based on a commitment report on 1st September 2008 which is based on partial inputting of the 2008 housing survey so actual commitments will be less than this.

Note: This table provides merely indicative numbers, at the time of publication of the LDP options paper the 2008 survey had not been completed. Figures are likely to be slightly lower than shown therefore.

The table above shows existing commitments (number of dwellings currently either allocated or given planning permission up to 2021).

Dwelling forecasts

A paper on Population and Housing was prepared for the evidence base of the LDP (Pembrokeshire County Council, 2008). To forecast dwelling requirements, estimates of second homes, holiday accommodation and vacant dwellings, together with shared accommodation were included as 'add-ons' to the household projections in order to derive the number of dwellings required for the 2006-2021 period. Demolitions have been set at zero as evidence suggests that dwellings demolished in the County are replaced. (A detailed explanation of this conversion process can be found under the relevant section of the report – The Method).

Table 56: Conversion of projected households to dwellings requirement 2006-2021

	Dwelling projections
PCC	4247
PCNPA	-1386
Outside the Park	5154

These projections do not take into account the issue of affordable housing.

Evidence of demand is provided by a draft Local Housing Market Assessment for Pembrokeshire which was produced following Welsh Assembly Government Guidance. This draft will be published as a final version later in the 2008 and will be amended to take account of up to date population projections, therefore these figures should be treated with caution. Using housing waiting list data and following a prescribed methodology for identifying affordable housing need it identified a need for 1539 affordable houses a year over a 10 year period. This would meet both newly arising need and the backlog of existing need for the County including the Pembrokeshire Coast National Park area. This figure is extremely high, the bulk of which is made up of the backlog of need. Authorities across Wales are finding similarly extreme figures and there is some concern over the methodology. Nevertheless affordable housing need is likely to be high because of a number of factors including the sale of council housing and rising house prices. However when deciding on the overall housing requirement, and the proportion that should be affordable, the capacity of infrastructure to accommodate development needs to be taken into account and the ability of the construction industry to deliver. The requirement must be achievable.

Homelessness

Table 57: Homelessness in 2004

2004 – Homelessness Type	Pembs	Pembs % all homeless Households	Wales	Wales % of all homeless Households
Ineligible Households	0	0%	72	0.3%
Eligible but not homeless	168	13.7%	6,347	27.6%
Eligible, homeless but not in priority need	434	35.4%	5,619	24.4%
Eligible, homeless and in priority need but intentionally so	86	7.0%	925	4%
Eligible, unintentionally homeless and in priority need	537	43.8%	10,040	43.6%
All Households	1,225	100%	23,003	100%
Eligible, unintentionally homeless and in priority need per 1000 population	4.6	--	3.4	

There were 266 people awaiting permanent accommodation at the end of April 2008 (Pembrokeshire County Council, 2008).

Table 58: Households found to be eligible for assistance, unintentionally homeless and in priority need

	Pembs	% Of Total	Wales	% Of Total
Household includes dependent child(ren)	261	48.6	4,042	40.3
Household member pregnant and no other dependent children	24	4.5	723	7.2
Vulnerable household member: old age	25	4.7	386	3.8
Vulnerable household member: Physical disability	46	8.6	434	4.3
Vulnerable household member: Mental illness/learning disability	34	6.3	679	0.0 6.8
Young person at risk: 18-20 yrs old	8	1.5	188	1.9
Young person at risk: 16-17 yrs old	65	12.1	985	9.8
Threat/Cases of domestic violence	27	5.0	1,310	13.0
Homeless after leaving armed forces	4	0.7	43	0.4
A former prisoner	32	6.0	785	7.8
Other	5	0.9	397	4.0
Household homeless in emergency	6	1.1	68	0.7
Total	537	100.0	10,040	100.0

Source: Stats Wales

Table 59: Homeless Reasons

	2002/3	2003/4	2004/5	2005/6
Rent Arrears – HA	0	0	0	0
Racial Violence / Harassment	2	1	0	0
Rent Arrears – LA	0	1	1	6
Rent Arrears – PRS	3	1	11	4
Mortgage Arrears	4	8	3	5
Other	10	5	5	2
Other Violence / Harassment	5	21	12	14
Leaving Institutional Care	20	20	33	55
Relationship Breakdown	78	107	105	103
Parents / Relatives / Friends no longer able to accommodate	117	193	173	136
Other Loss of Rented / Tied Accommodation	102	167	188	179
Total	341	524	531	504

Figure 21: Applications as Homeless

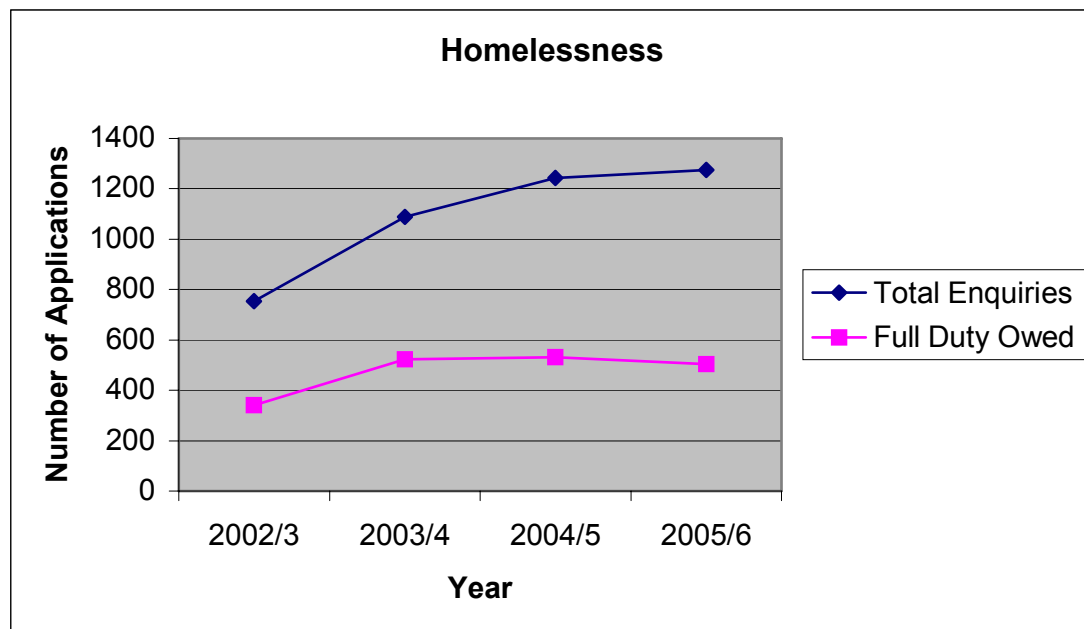
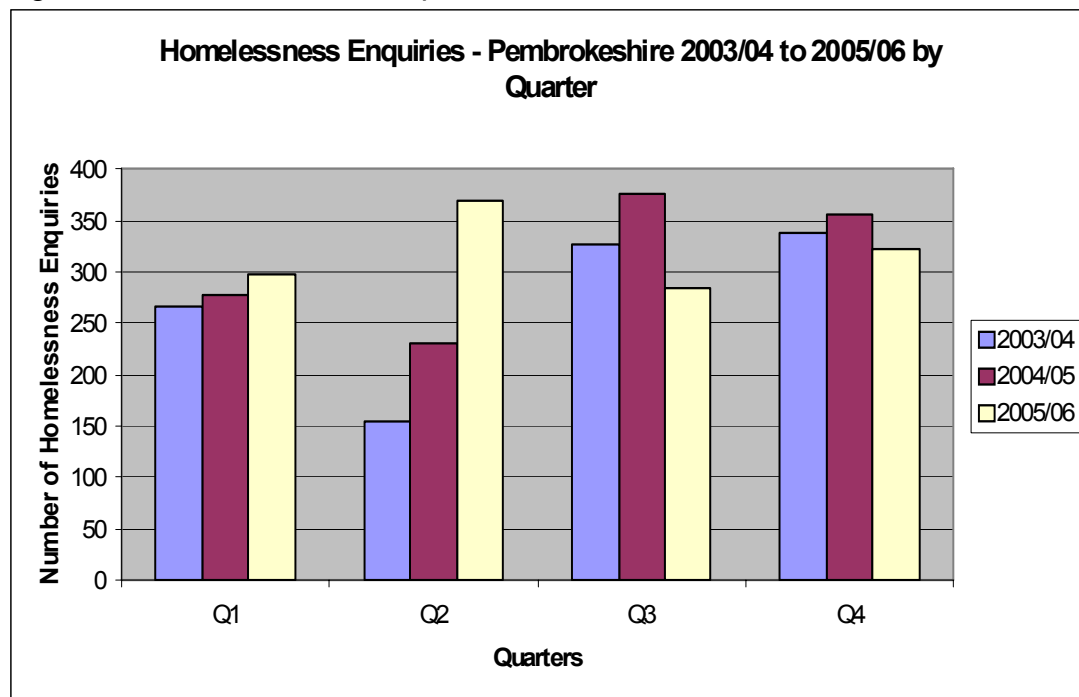


Figure 22: Homelessness enquiries



Data Gaps and Uncertainties

Data for previous years in “Homelessness type” and “Households found to be eligible for assistance, unintentionally homeless and in priority need”.

Following the introduction of new data recording, it is anticipated that more detailed analysis by area will be possible in future years.

Source:

Stats Wales

Pembrokeshire County Council Draft Local Housing Market Assessment

Access to services

Pembrokeshire County Council produced an Access to Services Report in April 2006 following a survey asking for residents’ perception of ease of access to a range of services.

This table summarises the perception of access to each of the services given in the survey. Every service is more accessible to the urban population with schools, open space and pharmacies the most accessible services to all. Civic amenity sites, on the other hand, are considered relatively hard to reach by all.

Table 60: Perception of access to services

Accessibility. Very easy or fairly easy	Low difference in rural/urban	High difference in rural/urban
90%+	Local Schools Park / open space Pharmacy	Shopping facilities GP
80% - 89%	Recycling facilities Place of work Sport or Leisure centre	Library Public transport
70% - 79%	Civic amenity site	Council Office Childcare Local Hospital Cultural facility

Source: Pembrokeshire County Council internal report - Access to Services Report 2006

Welsh Language

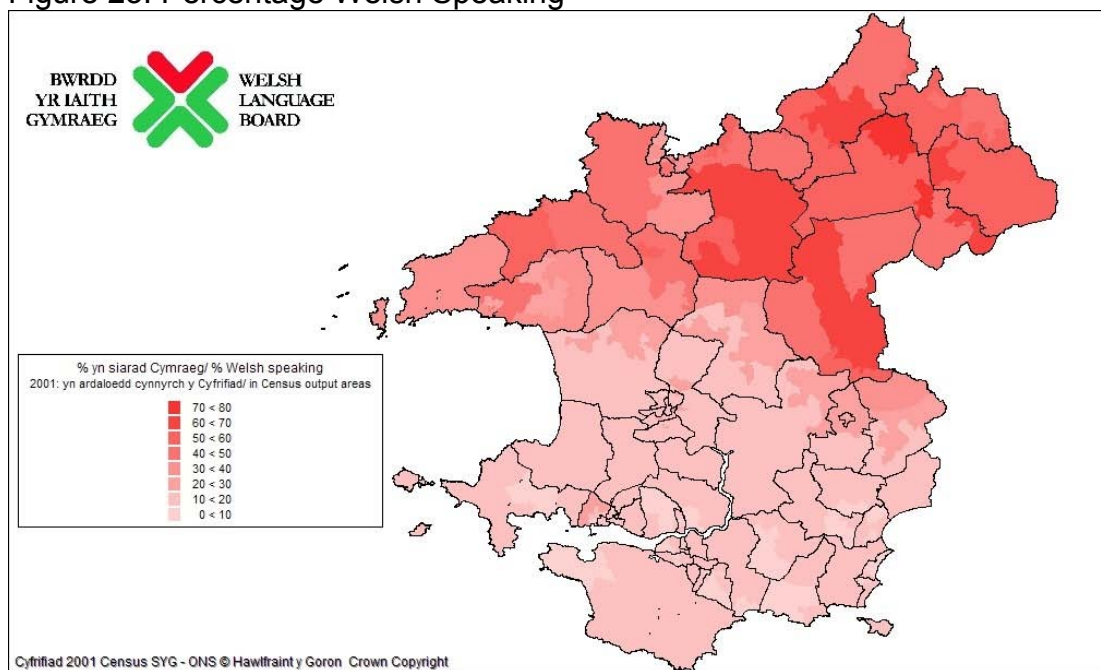
The 2001 Census asked the 110,182 residents aged over 3 years to describe their level of Welsh knowledge (Table 61).

Table 61: Level of Welsh knowledge

Level of ability	Pembrokeshire		Wales	
	Number of persons	Percentage of population	Number of persons	Percentage of population
Understands spoken Welsh	26,915	24.43%	661,526	23.58%
Speaks Welsh	23,967	21.75%	582,368	20.76%
Reads Welsh	22,006	19.97%	567,152	20.21%
Writes Welsh	19,360	17.57%	495,519	17.66%
Speaks, reads or writes Welsh	26,358	23.92%	659,301	23.50%

In the last decade, the County has moved up three places to become the 8th highest in Wales in terms of the percentage of Welsh speakers, and this reflects the growing interest in the language and culture within Pembrokeshire.

Figure 23: Percentage Welsh Speaking



Source: 2001 Census data

Bwrdd yr Iaith Gymraeg / Welsh Language Board:

<http://www.bwrdd-yr-iaith.org.uk/cynnwys.php?cID=&pID=109&nID=197&langID=2>

Crime - British Crime Survey

The Pembrokeshire Monthly Performance Monitoring Summary for April 2007 included the following table, summarising crime statistics throughout the County during the preceding 12 months.

Table 62: Crime statistics

Crime Type	Baseline 03/04	April 05 – March 06	April 06 – March 07	Change from baseline
BCS* Comparator Crime	4036	4448	4600	Up 14%
Criminal Damage	1840	2324	2289	Up 24%
Wounding (serious and other)	1108	1010	1003	Down 9%
Theft from a vehicle	323	309	405	Up 25%
Theft or unauthorised taking of a vehicle	97	134	122	Up 26%
Domestic Burglary	179	172	173	Down 3%
Common Assault (inc. PC)	372	362	478	Up 28%
Vehicle Interference	19	31	32	Up 68%
Theft or unauthorised taking of a Cycle	72	69	56	Down 22%
Theft from the person	17	27	27	Up 59%
Robbery of personal	9	10	15	Up 67%

property				
----------	--	--	--	--

*** BCS – British Crime Survey**

The BCS measures the amount of crime in England and Wales. This includes crimes which may not have been reported to the police, or recorded by them. It thus provides an important alternative to police recorded crime statistics. Without the BCS the government would have no information on these unreported crimes. The BCS also helps identify those most at risk of different types of crime. This is used in designing and informing crime prevention programmes. It is also used to assess people's attitudes to crime and towards the Criminal Justice System. It is one of the major sources of information about levels of crime, public attitudes to crime and other Home Office issues.

Fear of crime surveys:

% of Pembrokeshire residents who “feel safe living in Pembrokeshire”

2004/05 - 86% (Residents Survey based on the percentage of people disagreeing with the statement “I often do not feel safe living in this area”)

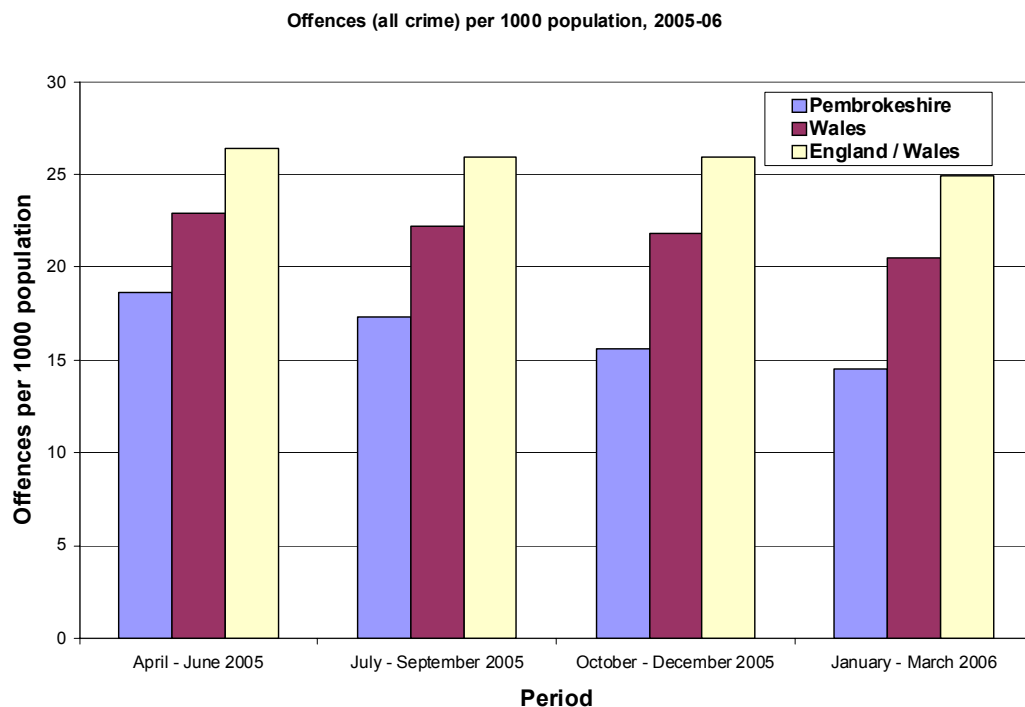
2005/06 - 94%

2006/07 - 94%

Source:

Pembrokeshire residents' survey and Citizens' panel

Figure 24: Offences per 1000 population in Pembrokeshire, Wales and England/Wales – All crime



Source: British Crime Survey, April 2005 – March 2006

<http://www.crimestatistics.org.uk/tool/Default.asp?region=5&force=16&cdrp=168&l1=0&l2=0&l3=0&sub=0&v=36>

Table 63: British Crime Survey results for various crimes (offences)

Crime	Pembrokeshire		Wales	
	Apr 05 – Mar 06	Apr 06 – Mar 07	Apr 05 – Mar 06	Apr 06 – Mar 07
Theft of a motor vehicle	135	120	11,695	11,312
Theft from a motor vehicle	318	403	26,115	25,307
Burglary in a dwelling	171	178	10,010	10,578
Violent against the person	1,897	2,045	52,595	53,667
Robbery	9	17	1,137	1,354
Criminal damage including arson	2,331	2,274	64,044	65,053

Source: ONS

<http://www.neighbourhood.statistics.gov.uk/dissemination/LeadTableView.do?adminCompAndTimeId=21471%3A256&a=3&b=276866&c=pembrokeshire&d=13&r=1&e=3&f=21467&o=171&g=415946&i=1001x1003x1004x1005&l=904&m=0&s=1209479855457&enc=1>)

Crime Reduction Targets

The Home Office wishes to see national crime levels reduce by 15% from 2003/2004 figures by 2008. Although the overall crime rate within Pembrokeshire is low, local reduction targets are being negotiated with the Welsh Assembly Government.

Pembrokeshire consistently records lower figures than the national average, though the range varies across periods more than at national level. Criminal damage, theft of and from vehicles and violence against persons constitute the highest proportion of criminal offences which is a similar picture at a national level.

Source: Home Office Crime Statistics -

<http://www.crimestatistics.org.uk/tool/Default.asp?region=5&force=16&cdrp=168&l1=0&l2=0&l3=0&sub=0&v=36> – accessed 14 January 2008

Pembrokeshire Voice survey on crime and disorder

Questions on crime and disorder were asked in the Pembrokeshire Voice survey:

- How do you think levels of crime and disorder in your area compare to the UK average?
47% of people said that they felt fairly safe walking alone in their area after dark, 26% felt very safe and 13% said they did not go out alone. 9% felt fairly unsafe, 3% said they were not sure and 2% felt very unsafe.
- How safe do you feel walking alone in your area after dark?
80% of people thought that the levels of crime and disorder in their area were lower or much lower than the UK average. 9% believed levels were about the same, 8% of people said they did not know and 3% felt they were higher or much higher.

Source: Pembrokeshire Voice, February 2007

Miscellaneous Crime Reference Sources:

PCC Corporate & Improvement Plan 2007/08

PCC Pembrokeshire Monthly Performance Monitoring Summary

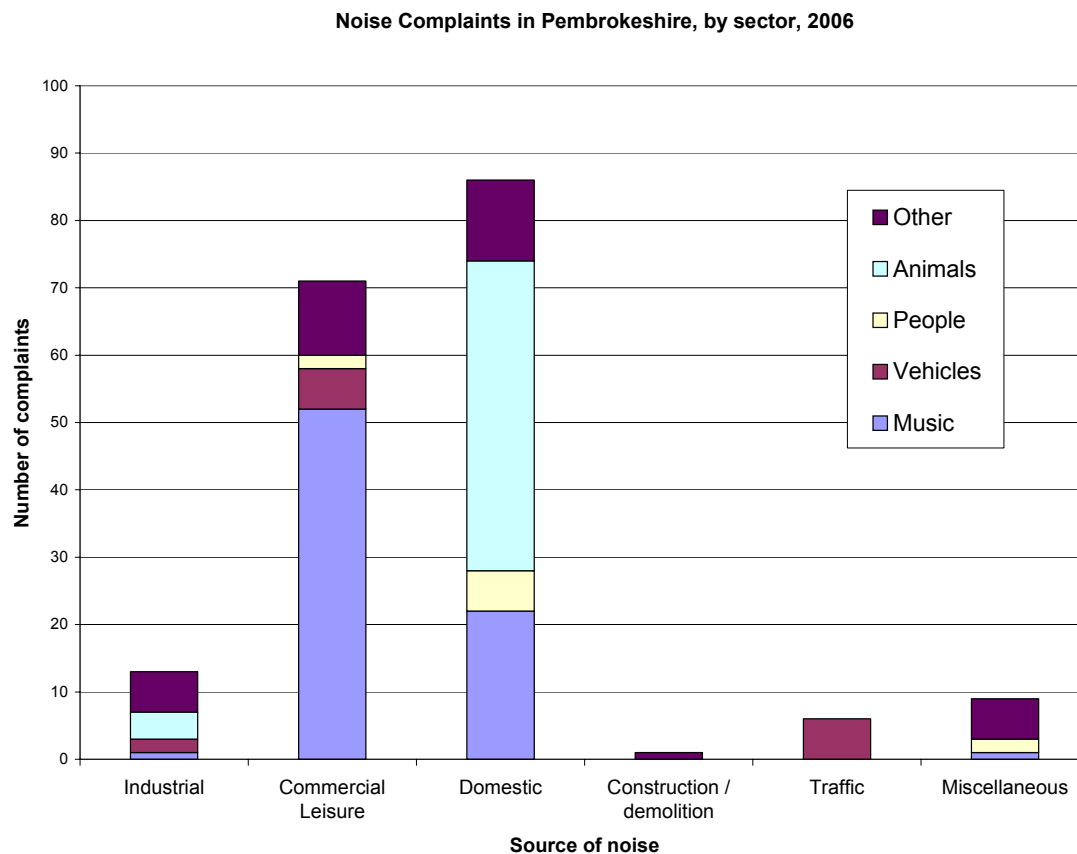
Home Office Crime Statistics -

<http://www.crimestatistics.org.uk/tool/Default.asp?region=5&force=16&cdrp=168&l1=0&l2=0&l3=0&sub=0&v=36> – accessed 14 January 2008

Noise

In 2006, Pembrokeshire County Council received 186 complaints regarding 181 incidents of excessive noise, all of which were resolved. The following chart shows that the vast majority of cases occurred in Commercial Leisure or Domestic sectors.

Figure 25: Noise complaints



Source:

Pembrokeshire County Council – Public Protection Division annual results 2006

6. Economy

A number of indicators of the economy and industry in Pembrokeshire are given in this section which relate to the **whole of the County** including the areas in the National Park.

Economic Activity

Table 64: Economic activity statistics for Pembrokeshire, 2005

2005	Pembrokeshire (numbers)	Pembrokeshire (% of population aged 16-64)	Wales (% of population aged 16-64)
All people			
Economically active	51,400	76.8	75.2
In employment	48,100	71.9	71.2
Employees	38,700	57.8	62.1
Self employed	9,100	13.6	8.5
Unemployed	3,300	6.5	5.3
Males			
Economically active	27,800	80.8	79.0
In employment	26,000	75.7	74.1
Employees	18,900	55.0	61.0
Self employed	7,000	20.3	12.6
Unemployed	1,800	6.4	6.1
Females			
Economically active	23,700	72.7	71.2
In employment	22,100	67.9	68.2
Employees	19,800	60.8	63.2
Self employed	2,100	6.6	4.3
Unemployed	1,600	6.6	4.3

Table 65: Economic activity statistics for Pembrokeshire, 2006

2006	Pembrokeshire (numbers)	Pembrokeshire (% of population aged 16-64)	Wales (% of population aged 16-64)
All people			
Economically active	54,900	77.3	75.1
In employment	51,800	72.8	71.1
Employees	42,300	60.6	62.0
Self employed	8,800	11.6	8.6
Unemployed	2,700	5.0	5.2
Males			
Economically active	30,000	83.2	78.9
In employment	28,400	78.6	74.3
Employees	21,600	61.1	61.2
Self employed	6,700	17.6	12.6
Unemployed	1,600	5.5	5.8
Females			
Economically active	24,900	71.0	71.2
In employment	23,400	66.5	67.8
Employees	20,800	60.2	62.8
Self employed	2,100	5.4	4.5
Unemployed	1,500	6.1	4.5

Table 66: Economic activity statistics for Pembrokeshire, July 2006 to June 2007

July 2006- June 2007	Pembrokeshire (numbers)	Pembrokeshire (% of population aged 16-64)	Wales (% of population aged 16-64)
All people			
Economically active	56,500	78.8	75.2
In employment	54,200	75.7	71.1
Employees	44,800	64.0	61.8
Self employed	8,900	11.3	8.7
Unemployed	2,300	4.1	5.4
Males			
Economically active	30,400	84.3	78.9
In employment	29,200	81.1	74.2
Employees	22,600	64.3	61.0
Self employed	6,500	16.7	12.5
Unemployed	1,200	4.0	5.9
Females			
Economically active	26,000	73.0	71.4
In employment	25,000	70.0	67.8
Employees	22,200	63.6	62.6
Self employed	2,400	5.6	4.6
Unemployed	1,000	4.0	4.9

Source:

Official Labour Market Statistics - www.nomisweb.co.uk based on ONS annual population surveys data. Last accessed December 2007.

Employee jobs

The following table provides details of employee jobs in Pembrokeshire by sector, with a comparison to the Welsh average in 2006. Employee jobs do not include self-employed workers, government-sponsored trainees or members of the Armed Forces.

Table 67: Employee jobs by sector

2006	Pembrokeshire (numbers)	Pembrokeshire (% of population aged 16-64)	Wales (% of population aged 16-64)
Total employee jobs	39,900	-	-
Full-time	24,300	60.9	68.9
Part-time	15,600	39.1	31.1
Employee jobs by industry			
Manufacturing	3,000	7.4	10.9
Construction	3,100	7.7	4.8
Services	33,400	83.6	82.9
- Distribution, hotels & restaurants	12,600	31.4	23.5
- Transport & communications	2,200	5.5	5.9
- Finance, IT, other business activities	3,600	9.0	21.2
- Public admin, education & health	12,700	31.7	26.9
- Other services	2,400	5.9	5.4
Tourism-related [†]	5,900	14.8	8.3

- Data unavailable

† Tourism consists of industries that are also part of the services industry

Notes: % is a proportion of total employee jobs

Employee jobs excludes self-employed, government-supported trainees and HM Forces

Source: ONS annual business inquiry employee analysis

Source:

Official Labour Market Statistics - last accessed 26 February 2008:

<https://www.nomisweb.co.uk/reports/lmp/la/2038432114/report.aspx#tabjobs>

Number of people working from home

Table 68: People working from home

	Pembrokeshire		Wales
	Number	%	%
All people [†]	44,897	-	-
Works mainly at or from home [#]	7,377	16.4	9.7

† All people aged 16 to 74, who were usually resident in the area at the time of the 2001 Census, and were in employment.

All people aged 16 to 74, who were usually resident in the area at the time of the 2001 Census, and worked mainly at or from home.

The percentage of people who work mainly at or from home (16.4%) is higher than the proportion in Wales (9.7%).

Source

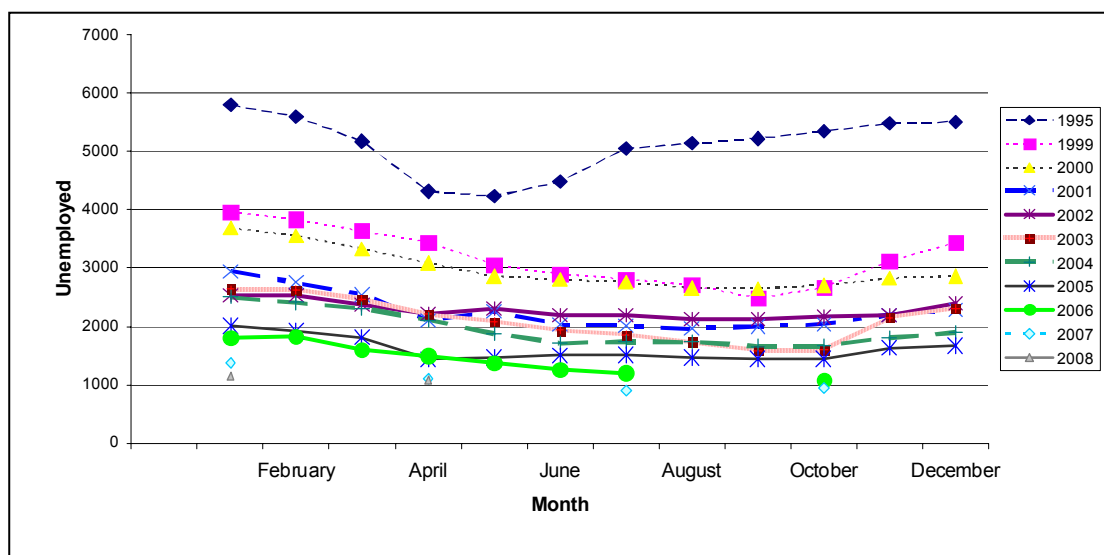
Census, ONS, Distance travelled to work (UV35), 2001

<http://www.neighbourhood.statistics.gov.uk/dissemination/LeadTableView.do?a=3&b=276866&c=pembrokeshire&d=13&e=9&g=415946&i=1001x1003x1004&m=0&r=1&s=1209135352187&enc=1&dsFamilyId=121>

Unemployment & economic inactivity

Number of unemployment claimants in Pembrokeshire, by month and year from 1995 to 2008 (note that only quarterly data available from January 2006):

Figure 26: Unemployment claimants



Source: Data extrapolated from Nomis:

https://www.nomisweb.co.uk/reports/lmp/la/2038432114/subreports/jsa_time_series/report.aspx

The diagram also illustrates that seasonal unemployment, previously a major factor in winter unemployment rates, has become less pronounced in recent years.

Economically inactive

Table 69: % of people of working age who are economically inactive in Pembrokeshire, 2006 and Jul 2006 – June 2007 (Nomis)

	Pembrokeshire (numbers)		Pembrokeshire (% of population aged 16-64)		Wales (% of population aged 16-64)	
	2006	2007	2006	2007	2006	2007
All people						
Economically inactive	15,200	14,300	22.7	21.2	24.9	24.8
Wanting a job	3,300	2,300	4.8	3.4	5.8	5.5
Not wanting a job	12,000	12,000	17.9	17.8	19.1	19.3
Males						
Economically inactive	5,800	5,500	16.8	15.7	21.1	21.1
Wanting a job	1,500	900	4.3	2.7	4.9	4.8
Not wanting a job	4,300	4,500	12.5	13.0	16.2	16.3
Females						
Economically inactive	9,500	8,800	29.0	27.0	28.8	28.6
Wanting a job	1,800	1,400	5.4	4.2	6.7	6.2
Not wanting a job	7,700	7,500	23.6	22.8	22.2	22.5

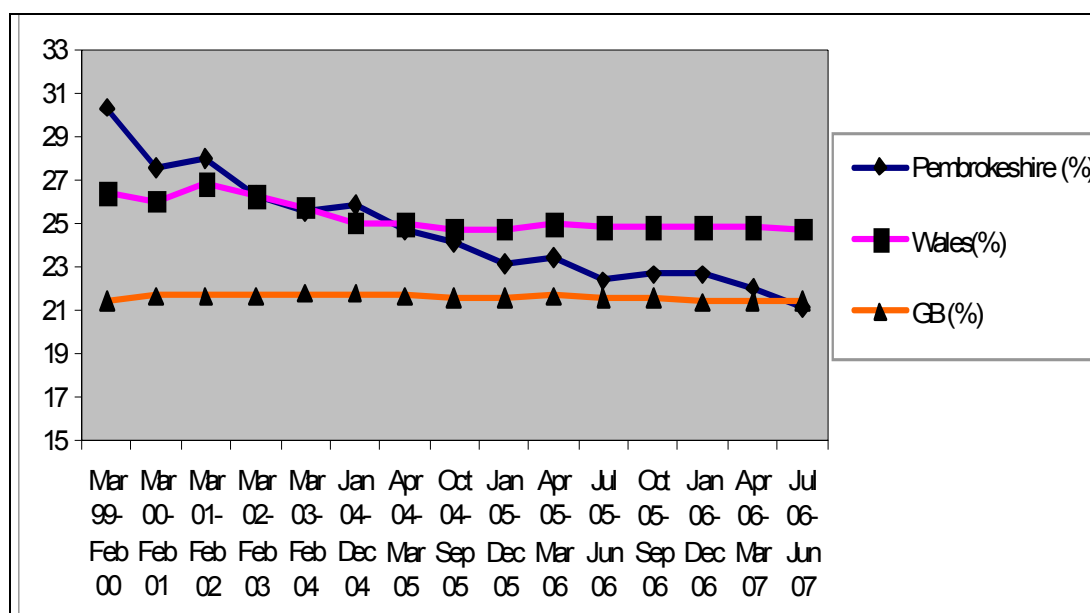
Notes: Numbers and % are for those of working age
% is a proportion of total working age population

Economically inactive: People who are neither in employment nor unemployed. This group includes, for example, all those who were looking after a home or retired.

Wanting a job: People not in employment who want a job but are not classed as unemployed because they have either not sought work in the last four weeks or are not available to start work.

Not wanting a job: People who are neither in employment nor unemployed and who do not want a job.

Figure 27: Percentage of population aged 16-64 economically inactive in Pembrokeshire, Wales and Great Britain, 1999/00 – 2006/07



Source: Extrapolated from Nomis

https://www.nomisweb.co.uk/reports/lmp/la/2038432114/subreports/einact_time_series/report.aspx

Other sources:

Pembrokeshire Advance – Rural Development Plan 2007-2013, Part D

Official Labour Market Statistics:

<https://www.nomisweb.co.uk/reports/lmp/la/2038432114/tabjobs>

Employment land availability

Table 70: Total area of employment land in Pembrokeshire, annually, by hectare

	Allocated	Not Allocated	Total
Total site area, 2000	771.85	529.72	1301.57
Total site area, 2003	727.96	517.36	1245.32
Total site area, 2005	718.98	556.42	1275.4

The slight increase in 'Not Allocated' land from 2003 to 2005 was caused largely by the recalculation of the size of the PetroPlus site, from 150.8 ha to 195.1 ha.

The JUDP (adopted 2006) allocated 525.49 ha of employment land. These were a mix of strategic and local sites. The sites include the Cleddau Bridge Business Park, Withybush Business Park, Pembroke Power Station Site, Esso Refinery Site and Trecwn (former RNAD). Existing employment sites are also listed in the JUDP. This is where proposals for new or extended employment uses will normally be permitted within the specified use classes.

In 2007 over 60% of the total employment land available in Pembrokeshire had been developed, leaving 555.47ha (38.25%) of undeveloped employment land.

Pembrokeshire has a number of extremely large employment sites, greater than 100ha in size, such as former oil refineries and power stations, which are attributed to Pembrokeshire's economic history. These very large strategic sites account for over 76% of the total area of employment land available in 2007.

There are no medium sized employment sites, of between 51-100ha, within the county in 2007, leaving just under a quarter of the total employment land on small sites (0-50 ha) in size, many of which are less than 10ha in size. Furthermore the 2007 results show that over 70% of undeveloped employment land lies on sites greater than 100ha in size, leaving just under 30% of undeveloped land on sites less than 50ha in size.

In terms of employment land in the main settlements in the County the 2007 employment land report clearly indicates that Pembroke Dock, Milford Haven and Haverfordwest (including Withybush) are the towns with the largest amount of allocated employment land available (82.59ha, 54.19ha and 55.07ha respectively), with Haverfordwest having the largest area of land undeveloped

Sources

Internal PCC Report - Employment Sites Report Comparison of 2000, 2003 and 2005 Survey Data. May 2006.

PCC Employment Sites Report, 2008.

Income

Table 71: Average gross hourly and weekly pay in Pembrokeshire and Wales by residence, in 2006 and 2007

YEAR	Earnings by residence	<u>Hourly pay</u>		<u>Gross weekly pay</u>	
		Pembrokeshire	Wales	Pembrokeshire	Wales
2006	Full time workers	£9.17	£10.10	£367.50	£404.20
	Male	£9.62	£10.80	£424.20	£447.30
	Female	£7.96	£9.29	£305.80	£350.10
2007	Full time workers	£9.08	£10.40	£369.70	£415.50
	Male	£9.13	£10.91	£380.90	£450.00
	Female	#	£9.78	£351.80	£362.10

Sample size too small for reliable estimate. Does not include self employed

Nomis

Time series data extrapolated from:

https://www.nomisweb.co.uk/reports/lmp/la/2038432114/subreports/asher_time_series/report.aspx

Sources:

Official Labour Market Statistics:

<https://www.nomisweb.co.uk/reports/lmp/la/2038432114/report.aspx#tabearn>

Pembrokeshire Advance - Rural Development Plan 2007 – 2013, Part D

Labour Demand

‘Jobs density’ is a ratio of total jobs available to population aged 16-64. Total jobs includes employees, self-employed workers, government-sponsored trainees and members of HM Armed Forces.

Table 72: Jobs density in Pembrokeshire, Wales and G.B.

	Pembrokeshire (density)	Wales (density)	Great Britain (density)
2005	0.79	0.78	0.84
2001	0.75	0.73	0.82

Source:

Official Labour Market Statistics, based on ONS Census and population survey data

Stock of VAT Registered Businesses

Table 73: The number of VAT registered businesses in Pembrokeshire at the beginning of recent years and the annual net loss / gain of registrations

	VAT Registered Business per Year			
	2004	2005	2006	2007
Stock at 1 January	4975	4895	5135	5165
Net loss / gain	N/A	-80	+ 240	+30

A breakdown of the sectoral structure of Pembrokeshire's VAT registered businesses is given below, for the year 2005, with percentage comparison to Wales.

Table 74: Sectoral structure of VAT registered businesses

Sector	Pembrokeshire		Wales
	Number	% of all VAT registered businesses	% of all VAT registered businesses
ALL	4,895	100.0	100.0
Agriculture, hunting, forestry & fishing	1,665	34.0	19.9
Mining, quarrying, and electricity, gas and water supply	10	0.2	0.1
Manufacturing	240	4.9	7.3
Construction	515	10.5	11.5
Wholesale, retail trades & motor trades	865	17.7	21.0
Hotels and restaurants	565	11.6	9.5
Transport, storage & communications	135	2.8	4.4
Financial intermediation	5	0.1	0.4
Real estate, renting & business activities	580	11.9	18.5
Public admin, defence, compulsory social security and other	265	5.4	6.0
Education, health and social work	45	0.9	1.4

Sources:

Pembrokeshire Advance - Rural Development Plan 2007-2013, Part D
StatsWales -

<http://www.statswales.wales.gov.uk/TableViewer/tableView.aspx?ReportId=111>

Industrial Structure

Table 75: Size of enterprises by quantity and percentage in Pembrokeshire and Wales, 2006

Size	Pembrokeshire		Wales	
	Number of enterprises	% of total enterprises	Number of enterprises	% of total enterprises
All Enterprises	11,865	100	190,420	100.0
Micro (0 – 9 employees)	11,220	94.5	179,855	94.5
Small (10 – 49 employees)	390	3.3	7,065	3.7
Medium (50 – 249 employees)	80	0.7	1,890	1.0
Large (250+ employees)	175	1.5	1,615	0.8

Source:

Stats Wales, last accessed 27th February 2008:

<http://www.statswales.wales.gov.uk/TableViewer/tableView.aspx?ReportId=1694>

Wealth Creation

Indicators for wealth creation specifically in Pembrokeshire are not available – Pembrokeshire is bracketed with Carmarthenshire and Ceredigion as South West Wales. Wealth creation is measured by Gross Value Added (GVA) per capita. GVA measures the contribution to the economy of each individual producer, industry or sector in the United Kingdom.

Table 76: Gross Value Added (GVA) per capita at current basic prices, 2002-2005 (£)

Year	South West Wales	Wales
2002	9,192	11,980
2003	9,601	12,633
2004	10,033	13,316
2005		13,813
2006		14,396

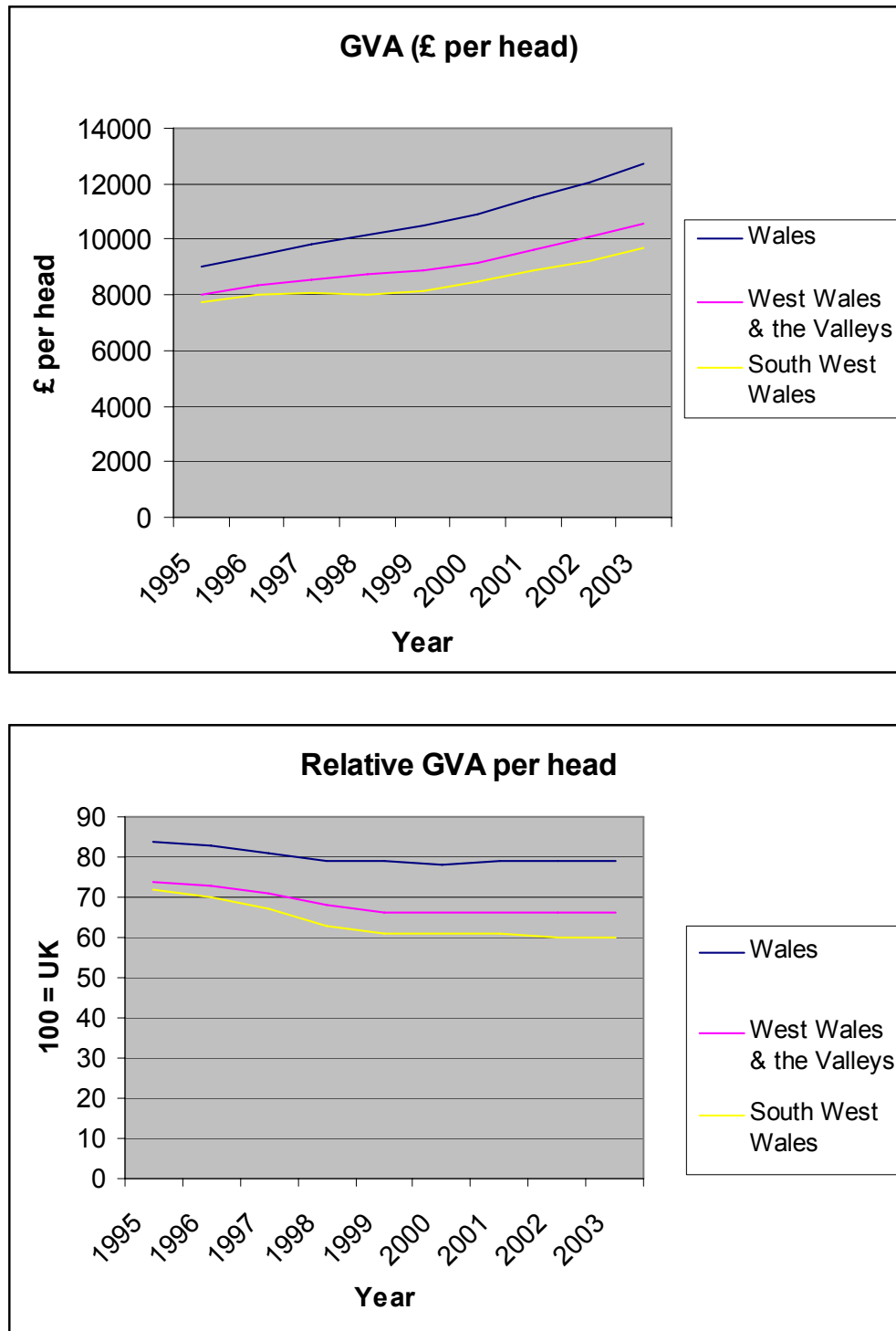
Table 77: WSP - ONS, Regional GVA December 2006

	Year	1999	2000	2001	2002	2003	2004
Measure	Area						
£ million	Wales	30595	31744	33416	35024	37115	39316
	West Wales and the Valleys	16545	17039	17823	18657	19716	20870
	East Wales	14050	14705	15593	16366	17399	18447
£ per head	Wales	10548	10920	11482	11980	12633	13316
	West Wales and the Valleys	8932	9195	9610	10029	10556	11126
	East Wales	13404	13954	14772	15397	16256	17133
Index (UK=100)	Wales	79	79	79	78	78	78
	West Wales and the Valleys	67	66	66	65	65	65
	East Wales	100	100	101	100	100	100

Source: [000300] Sub-regional Gross Value Added (GVA), by Welsh NUTS2 area (Welsh NUTS areas) NS ETES3, Welsh Assembly Government

As may be seen from the graphs below, whilst this is rising in absolute terms, it is declining in comparison to the UK average.

Figure 28: GVA per head 1995-2003 and relative GVA per head



The reasons behind these figures are highly complex and inter-related. In broad terms, however, low GDP per head in Pembrokeshire is the result of a combination of the following key factors:

- Ageing population structure

- 32% of all those aged 16+ are over retirement age (this compares with 25% for Wales as a whole)
- Low value added economy
 - Over-reliance on primary sectors
- Domination of micro-businesses in a small and peripheral economy
 - Over 94% of businesses employ fewer than 10 people, but have restricted scope for expansion due to limited local markets and Pembrokeshire's distance from other markets
- Pembrokeshire's peripheral location and distance from major markets mean that it is difficult for the County to benefit from the agglomeration effects associated with so-called "city regions".

Source: Pembrokeshire Advance - Rural Development Plan 2007-2013, Part D.

Data Gaps and Uncertainties

Pembrokeshire GVA data is unavailable.

Sources:

ONS, Regional GVA December 2006
Stats Wales

Agriculture

Land Area and Usage

Wales - Approximately 2 million hectares of land
Of which 81% is rural

Pembrokeshire - 170,000 hectares
125,752 hectares (74%) is rural
Of which 60% is permanent grassland and 26% is arable
3,591 agriculture holdings employ a labour force of 5,862 owners and employees, which has decreased from 11,000 in 1911.

Farms and farming related occupations provide 7,000 jobs in Pembrokeshire.

Employment Trends and Business Prospects

In the current economic climate, employment prospects within the land-based industries are poor. This lack of opportunity coupled with low incomes, has resulted in the younger generation migrating from rural areas in search of employment. As a consequence, the age structure of the rural population has deteriorated. The recent trend towards aggregation of farm holdings resulting in an increase in the number of large holdings and a decline in the availability of smaller holdings also makes it harder for young people to enter the industry. Unless these, and other, problems are resolved the sustainability of agriculture and the rural economy is in jeopardy. (The Road to Recovery for Rural Wales – the FUW Manifesto 2003). A demand for higher yields and greater profitability has fuelled the experimentation with genetic modification of crops and stock and raising public fears for the environmental implications.

Source: Pembrokeshire Coastal Forum – Topic Papers – Agriculture Rural Land Use (August 2003)

Agri-environment schemes

EU Common Agriculture Policy – Objective 1 programme for Wales
June 2003 – EC moved away from production related subsidy due to problems including over grazing, intensified use of fertilizers and increasing animal health risks.

A large proportion of Pembrokeshire is classified as a ESA (Environmentally Sensitive Area) which are designated under Section 18 of the Agriculture Act 1986. Its objective is to protect and enhance the environment through encouraging environmentally beneficial agricultural practices. Incentive payments are made under the Tir-Gofal scheme covering all of Wales.

Diversification of the rural economy occurs through the re-use of buildings for new houses. Schemes that currently operate are as follows:

- Tir-Mynydd – replaced Hill Livestock Compensatory Allowance as a method of supporting farmers in less favoured areas.
- Single Payment Scheme – introduced the 1st January 2005 it replaced most livestock and crop payment schemes, it breaks from traditional

production led payments. Recipients must show that they are keeping their land in good condition.

- Farm Improvement Grant (FIG) – Capital grant aimed at improving farm holdings, available through the Farming Connect Service.
- Farm Enterprise Grant (FEG) – Available for on farm diversification, available through the Farming Connect Service.
- Environmentally Sensitive Area (ESA) Scheme – helps farmers in ESA's whilst maintaining and protecting the landscape.
- Tir-Gofal – Encourage farmers to maintain the agricultural landscape and wildlife. The scheme also intends to improve public access to the working countryside and provide education and training opportunities.
- Tir-Cynnal – Entry level agri-environment scheme aiming to broaden opportunities for farmers wishing to take part in agri-environment schemes, also acts as a feeder for Tir-Gofal scheme.
- Habitat Scheme – Helps farmers protect and enhance the wildlife value of specifically important habitats in Wales.
- Organic Farming Scheme – Helping farmers convert to organic farming.
- Farm Woodland Premium Scheme – Payments for farmers who convert agricultural land to woodland.

Trends

The number of agri-environment schemes has increased over recent years enabling farmers to find alternate sources of incomes which help maintain the numbers in farming. Farms can be expected to continue taking part in these schemes as traditional farming practices become less profitable. Diversification levels and range are therefore likely to increase in the rural economy.

Source:

Welsh Agricultural Statistics 2006

Tourism

Table 78: Volume and value of tourism in Pembrokeshire – Summary

	CAMBRIDGE 2003	STEAM 2003	CAMBRIDGE 2004	STEAM 2004
Visitor trips				
Staying trips	1,153,000	*	1,209,000	
Tourism/leisure day trips	2,100,000	2,025,000	2,173,000	1,875,000
Total visitor nights	5,100,000	10,565,000	5,377,000	10,732,000
Total visitor days	7,200,000	12,590,000	7,550,000	12,607,000
Visitor spend				
Direct visitor spend	£262,000,000	*	£292,712,000	
Indirect and induced spend	£81,000,000	*	£70,091,000	
Total visitor spend	£343,000,000	£423,000,000	£362,803,000	£450,300,000
Employment				
Total FTE jobs supported by tourism	6,139	*	6415	16,105

2005 – STEAM Model (Scarborough Tourism Economic Activity Monitor)

Total tourism trips (staying and day visitors) - 4,140,000

Total tourism spending - £449,200,000

FTE jobs supported by tourism - 15,964

Data Gaps and Uncertainties

Data is derived from commercially run models which differ hugely in their outputs, despite having the same local inputs in terms of bedspace criteria, occupancy etc, and are at best indicative and in no way definitive. The reality is probably somewhere between the two. The most recent figures are for 2005 (from the STEAM model).

Source

PCC Tourism Strategy.

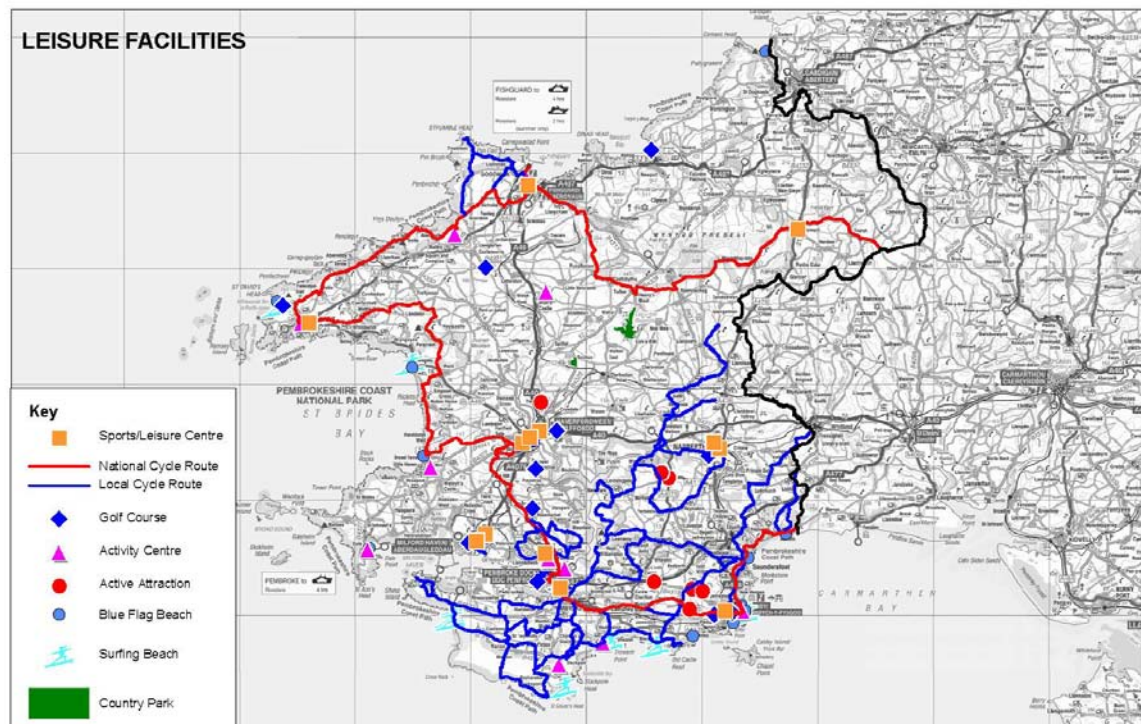
Recreation Facilities

Pembrokeshire County Council operate: 6 Multi Activity Leisure Facilities

3 Swimming Pools
5 Modern Fitness Suites
4 Artificial Turf Pitches
1 Indoor Bowls Hall
Outdoor Tennis Courts
Indoor Tennis Centre
Athletics Track

Plus other school and community based indoor and outdoor facilities (Figure 29).

Figure 29: Recreation facilities



Source: Health Care and Well-being Strategy 2008-2011 – Needs Assessment Report 2007

Table 79: Visitors using Leisure Centres

Year	Number
2004/05	984,000
2005/06	1,195,000
2006/07	1,318,000
2007/08 (Projected number)	1,357,000

Source: Health Care and Well-being Strategy 2008-2011 – Needs Assessment Report 2007

Sports Participation in the Community

Table 80: % of the Adult population (aged 18+) participating in moderately intense exercise for at least 30 minutes daily on 5 days of each week:

2004/05	2005/06	2006/07
42%	42%	42%

Source: Pembrokeshire County Council Corporate & Improvement Plan 07/08

Percentage of adults that are members of a sports club:

2003/04 – 17%

2004/05 – 17%

2005/06 – 17%

A target of 19% was set for 2006-07 (Pembrokeshire County Council C & I Plan 06/07).

Comparators

Wales: WAG has launched 'Climbing Higher' to increase sport participation rates, with dedicated schemes to increase community participation. Spending has grown 250% since 1999.

Sources:

PCC Corporate & Improvement Plan 2006/07

PCC Corporate & Improvement Plan 2007/08

Welsh Assembly Government - www.wales.gov.uk

Rights of way

When the figures from the WPI and Town and Community Council surveys between 2002 and 2005 were combined (and double entries removed) a total of 23% of the network had been surveyed. The table below summarizes the position at 2005.

Table 81

	Length of right of way (m)	% of paths surveyed
Paths open and signed	254,169	47%
Paths open but not signed	78,976	15%
Paths closed but signed	26,881	5%
Paths closed and not signed	177,957	33%
Total open	333,145	62%
Total closed	204,838	38%
Total surveyed	537,983	(100%)

The Pembrokeshire Coast National Park Authority surveyed the whole inland network in the National Park, checking which paths were open and met CCW criteria. The Pembrokeshire Coast Path itself was not included, but permissive paths were. The results are summarized below:

Table 82: Status of rights of way

	Length of right of way and permissive path (m)	% of paths surveyed
Open	878,106	83.5%
Closed	172,533	16.5%
Total surveyed	1050,639	(100%)

Source: Rights of Way Improvement Plan for Pembrokeshire (ROWIP) 2007-2017

In 2002, CCW commissioned a countrywide sample survey of rights of way, looking at a wide variety of issues, including the signing and ease of use performance indicators. Some of the results are summarised below:

Table 83: Signed and open rights of way

	Signed	Open
Pembrokeshire County Council	39.7%	23%
Pembrokeshire Coast National Park Authority	54.7%	55%
Wales	41.9%	46%

Source: Rights of Way Improvement Plan for Pembrokeshire (ROWIP) 2007-2017

Performance monitoring indicated that 63% of paths in the County were open in 2006/07.

Data Gaps and Uncertainties

Just 23% of network surveyed and represented in data for PCC.

Source:

Rights of Way Improvement Plan for Pembrokeshire (ROWIP) 2007-2017

Communications and Utilities

Water & Sewerage

Waste water – Dwr Cymru Welsh Water has numerous Waste Water Treatment Works within the County which are designed to treat foul effluent from residential and commercial/industrial premises. The discharges from each of the Works are licensed by the Environment Agency to meet European Directives. Dependant on the scale of development identified within your proposed Local Development Plan the associated sewerage catchments (sewer network & WWTW) and may need to be upgraded as required to accommodate future growth (Dwr Cymru Welsh Water).

Broadband, Digital Television and Radio Coverage

The area's ICT links are a key factor in its competitiveness and have the potential to reduce the need to travel. Although nearly all exchanges are now enabled for broadband, there are significant constraints on geographical coverage, capacity and cost. It is crucial to develop bandwidth and coverage, and to encourage competition between suppliers, so that the area has access to competitively priced, high specification broadband. Wireless broadband opportunities need to be exploited as part of this. More work is needed to increase take-up of ICT applications by local business and by the public more generally. A programme of action on ICT will be developed (WSP Pembroke-shire Haven, <http://new.wales.gov.uk/about/strategy/spatial/pembrokeshire/Pembsinterim/accessibility/?lang=en>).

Consultation on broadband and mobile telephone 'not spots' in Pembrokeshire is being undertaken between April and September 2008.

Digital radio is transmitted via the Preseli mast and should provide DAB radio to the majority of the County (<http://www.ukdigitalradio.com/home/default.asp>). Similarly, digital television is available throughout the County.

Mobile Communications

Groupe Speciale Mobile (GSM) are the world-leading mobile communications operator, providing a platform for over 700 networks including all the UK's leading providers (02, Orange, T-mobile and Vodafone).

For standard GSM 1800 connection, coverage by four operators is rated as 99.8% for all areas of the UK. In Pembrokeshire the only official weak spots are low, north-facing areas on the Coast on the 02 network. Ofcom has recently launched a Wales-wide investigation into quality levels of mobile phone coverage to determine the exact coverage levels.

Pembrokeshire lags behind much of the UK in terms of 3G coverage, which enables greater Internet use and video messaging. Only 32.3% of Wales is covered by four 3G operators, with the south-east and M4 corridor experiencing greatest coverage. In Pembrokeshire the networks have varying coverage:

02	No coverage
Orange	Haven area, Tenby & Fishguard areas only
T-mobile	Central Pembrokeshire only
Vodafone	Haven & Haverfordwest areas only

Sources:

<http://icwales.icnetwork.co.uk/news/wales-news/2008/01/05/disgrace-of-mobile-network-coverage-91466-20315617/> Accessed 9/1/08

http://www.gsmworld.com/roaming/gsminfo/cou_gb.shtml Accessed 9/1/08