Planning Pembrokeshire's Future
Local Development Plan

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Background Paper for Local Development Plan 2:

Retail and Commercial Centres

Pembrokeshire County Council

Development Plans

Updated July 2019

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Glossary of Terms

Class A1	Shops of all types including superstores and retail warehouses, also includes hairdressers, sandwich bars (except those selling hot food), travel agents, dry cleaners, and showrooms except car showrooms.
Class A2	Financial and Professional services to visiting members of the public, including banks, building societies, estate agents, betting offices.
Class A3	Food and drink outlets' including restaurants, pubs, wine bars, cafes and takeaways.
Class B1	Business use including offices (other than those falling in Class A2), research and development and industrial processes, provided the use could be carried out in any residential area without detriment to amenity by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.
Class B2	General industrial processes other than those falling within Class B1.
Class B8	Storage and distribution
Class C1	Hotels, boarding and guesthouses where no significant element of care is provided (excludes hostels)
Class C2	Residential Institutions including hospitals, nursing homes, residential schools and colleges
Class C2A[1]	Secure Residential institution prison, young offenders institution, detention centre, secure training centre, custody centre, short term holding centre, secure hospital, secure local authority accommodation or use as a military barracks.
Class C3(a),[2] C3(b), C3(c)	Dwelling houses
Class C4	Houses in multiple occupation
Class D1	Non-residential institutions including religious buildings, public halls, museums and medical services
Class D2	Assembly and Leisure including cinemas, bingo halls, casinos and indoor sports.
Sui Generis	Many uses do not fall within any Use Class and are described as Sui Generis – a class on their own. For example, theatres, amusement centres, car showrooms, petrol filling stations, launderettes, scrap yards and car hire offices are among uses which are specifically excluded from any of the defined Classes
Comparison goods	Retail items not bought on a frequent basis for example, Televisions and white goods (fridges, dishwashers etc).
Convenience goods	Everyday essential items such as food.
Bulky Goods	Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage and display.

[1] Town and Country Planning (Use Classes) (Amendment) (Wales) Order 2016
[2] Town and Country Planning (Use Classes) (Amendment) (Wales) Order 2016

Capacity (retail)	Potential spending by the public which could support existing and additional retail floorspace.
Leakage	Loss of trade (spend) to an area outside the retail centre
Services	Providing a service rather than a product to a customer, for example banks and estate agents.
Use Classes Order	The Town and Country Planning (Use Classes) Order 1987 as amended. The Use Classes order places the main uses of land and buildings into different categories. Planning permission is generally required for changes of use between classes and occasionally within a class.
Viability	Viability refers to the ability of the centre to attract and retain investment, not only to maintain the fabric, but also to allow for improvement and adaptation to changing needs.
Vitality	Vitality is a measure of how busy a centre is -
Wales Spatial Plan	'People, Places, Futures', The Wales Spatial Plan was adopted by the National Assembly for Wales in 2004 and updated in 2008. It sets a vision for how each part of Wales should develop economically, socially and environmentally over the next 20 years. It provides a strategic framework to guide future development. The Local Development Plan must have regard to the Wales Spatial Plan 2008. The Wales Spatial Plan will be replaced in due course by the National Development Framework for Wales.

1. Introduction

1.1 The review of the Local Development Plan 'Planning Pembrokeshire's Future' (adopted February 2013) commenced 5 May 2017. This background paper has been prepared to help inform the retail strategy of LDP2.

1.2 It draws on the Authority's evidence base contained within the 'Regional Retail Capacity Study', (February 2017) and the Authority's annual retail surveys of town centres within Pembrokeshire (excluding the Pembrokeshire Coast National Park). Where appropriate, these documents are cross referenced, rather than repeated.

1.3 The LDP2 retail strategy will also have regard to national policy requirements as set out in Planning Policy Wales (Edition 10) and Technical Advice Note 4 (Nov 2016) 'Retail and Commercial Development'. These documents provide guidance on the role of land use planning in retail and commercial development.

1.4 The issues facing different centres are summarised and potential future directions identified. Reference is made to relevant documents such as the Wales Spatial Plan Update 2008 and Masterplans (Strategic regeneration Frameworks) for Haverfordwest (2016), Pembroke (2018), Pembroke Dock (2018), Fishguard and Goodwick (2019). Milford Haven Regeneration Strategy remains a draft at the time of publication of this paper. [3]

1.5 The data within this paper will assist in identifying a locally defined retail hierarchy. Healthcheck information and primary data will help establish the appropriateness of primary and secondary frontages within centres, and strategy for centres which takes account of their existing and future roles.

1.6 Common issues across all of the centres to varying extents are, a need to upgrade the built environment, a limited range of shops and services, rising vacancy rates in most centres, seasonal opening, parking and congestion problems and changing retail and shopping patterns.

1.7 This paper should be considered in conjunction with the

- Retail Reports produced annually by Pembrokeshire County Council
- South West Wales Regional Retail Study (February 2017)

[3] A Strategic Regeneration Framework, February 2018 has been published for Tenby which is located within the Pembrokeshire Coast National Park.

2. National Planning Policy & Guidance

2.1 National Planning Policy for retail and commercial centres is provided within Planning Policy Wales, 'Active and Social Places' and Technical Advice Note 4 'Retail and Commercial Development' November 2016.

2.2 They set out Welsh Government's objectives for retail and commercial centres to-

- Promote viable urban and rural retail and commercial centres, as the most sustainable locations to live, work, shop, socialise and conduct business.
- Sustain and enhance retail and commercial centres vibrancy, viability and attractiveness; and
- Improve access to, and within, retail and commercial centres by all modes of transport, prioritising walking, cycling and public transport[4]

2.3 TAN6 'Planning for Sustainable Rural Communities', July 2010 provides development management advice in relation to farm shops, and a requirement for the inclusion of development plan policy on the retention of important village services including village shops, post offices and rural petrol stations.

Planning Policy Wales

2.4 Planning Policy Wales identifies that Development Plans should:

- establish a local retail hierarchy which identifies the nature, type and strategic role to be performed by retail and commercial centres;
- where appropriate, set out measures to reinvigorate particular centres, as appropriate, including linking to centre-wide strategies, masterplans and place plans;
- help achieve vibrant, attractive and viable retail and commercial centres;
- identify the boundaries of retail and commercial centres contained within the hierarchy on the proposals map;
- allocate sites for retail and commercial centre uses where there is assessed to be a quantitative or qualitative need and where size and scale are in accord with the retail strategy. Sites should be identified using the sequential approach and, where appropriate, assessed for their impact on other centres;
- include a criteria based policy against which proposals coming forward on unallocated sites can be judged;
- set out policies for primary and secondary areas;
- develop policies which deal flexibly with changes to help achieve a balance and range of uses and activity;
- include policies relating to future development on existing retail sites to protect them from inappropriate development and to control and manage the release of unwanted retail sites to other uses; and
- monitor the health of retail centres to assess the effectiveness of policies.

[4] PPWales Edition 10, Paragraph 4,3,3

Technical Advice Note 4 'Retail and Commercial Development'

2.5 TAN 4 provides additional guidance. There is specific information to assist in defining a local hierarchy of centres.

> "4.1 In guiding development to the most appropriate location, local planning authorities, in their development plans, should develop a local hierarchy to classify their various retail and commercial centres, and apply appropriate policies to those centres based on their characteristics. This locally-driven approach to defining higher and lower order centres is seen as most appropriate as urban and rural areas will have different scales and characteristics which cannot be defined consistently at the national level.
>
> 4.2 Higher order retail and commercial centres need to be accessible to a large number of people, and the scale and diverse range of uses present will reflect the needs of a population that is normally greater than the local community. Higher order centres are typically characterised by combinations of shops, offices, financial & professional services, food and drink establishments, hotels, education facilities, entertainment and leisure, non-residential institutions as well as residential.
>
> 4.3 Lower order centres are characterised by smaller scale provision and fewer uses with the intention of primarily serving the needs of a local community. Lower order centres will typically include shops, financial & professional services, food and drink, and non-residential institutions of an appropriate scale, but depending on the centre may include other uses.
>
> 4.4 In considering where centres may lie in relation to the retail hierarchy, local planning authorities should also take into account the likely future status of that centre. For example, if, as part of the retailing strategy a centre has been identified for growth and new sites allocated, then this should be reflected in the status of that centre. Likewise, if the strategy is to manage the decline of a centre, this should also be reflected in that centre's position in the hierarchy".

Primary Retail Frontages

2.6 National Planning Policy advice on Primary Retail Frontages (PRF) can be summarised as follows. PRF -

- can help promote and maintain an effective distribution and balance of uses within centres.
- are generally characterised by a high proportion of A1 shopping uses
- require a flexible approach when economic conditions create persistently high vacancy rates and the right balance of uses is not being achieved
- primary retail frontages in small declining centres can restrict investment and diversity and defining them may not be appropriate
- Local Planning Authorities should consider how non A1 uses may play a greater role in retail and commercial centres to increase diversity and reduce vacancy levels

2.7 Where the role and function of the centre has changed over time the development plan strategy and retail hierarchy should address this.

Secondary Retail Frontages

2.8 Secondary Retail Frontages are characterised by a broad range of commercial uses. Residential uses in secondary [as well as primary] retail frontages are unlikely to be suitable on the ground floor. (PPWales 4.3.37).

Wales Spatial Plan[5]

2.9 'People, Places, Futures' The Wales Spatial Plan 2008 update provides the current strategic context for the Local Development Plan Review[6]. The relevant area strategy is 'Pembrokeshire - The Haven'. The vision for Pembrokeshire is

> *'A network of strong communities supported by a robust, sustainable, diverse high value-adding economy underpinned by the Area's unique environment, maritime access and internationally important energy and tourism opportunities'*

2.10 A key strategic priority for achieving the vision is

- Developing the Area's three strategic hubs. Critical to this is the renewal of town centres, the development of complementary settlement roles within and between hubs, strengthening community, economic and social outreach and spreading benefit and growth to the wider hinterlands and smaller rural communities.

2.11 It identifies The Haven Towns as a strategic hub, comprising

- Haverfordwest (important centre for retailing but currently underperforming town centre)

[5] The Wales Spatial Plan update 2008 remains in place until replaced by the forthcoming National Development Framework, anticipated 2020~~.~~

- Milford Haven and Neyland (requires upgrading to provide a more attractive retail environment. There is potential to consolidate and upgrade much of the built fabric of the town centres, linked to development of the quayside and docks, and to the marina and marine leisure development)
- Pembroke and Pembroke Dock (investment in the local shopping and tourism assets is a priority to ensure that the towns are meeting their potential in terms of local service provision and tourism).

2.12 It also advocates that the towns need to develop roles and functions so that, collectively, they complement rather than compete with one another.

2.13 Carmarthen is identified as a regional centre for retailing and has an important role in West Wales. Fishguard and Goodwick are seen important drivers of the north Pembrokeshire economy. Narberth is identified as a medium sized settlement, and Crymych, Kilgetty, and Letterston as smaller settlements.

2.14 Regenerating the Area's key town centres is seen as crucial in order to attract a wider range of private sector services and employment opportunities.

2.15 Whilst the Wales Spatial Plan provides an important context for Pembrokeshire, it must be recognised that elements of the Spatial Plan pre-date the economic downturn, growth in online sales and out-of-town retail trends and consumer preferences.

3. Regional Context

Carmarthenshire

3.1 Carmarthenshire County Council published a Retail Study Update in 2015. The report provides an update of the County wide needs assessment for retail development in Carmarthenshire during the LDP period and supersedes that part of the recommendations set out in the Retail Study 2009. The report concludes that lower expenditure growth during the recession, lower forecast future growth in expenditure and proportionally higher expenditure via special forms of trading will affect the retail floorspace capacity. Carmarthen retains the largest retail offer of the West Wales centres.

Ceredigion

3.2 Ceredigion County Council, along with Pembrokeshire County Council and Pembrokeshire Coast National Park Authority was a commissioning Authority for the South West Wales Regional Retail Study, published February 2017. Cardigan forms a key retail centre in south Ceredigion and Aberystwyth the main retail location within Ceredigion. There are strong relationships with the retail centres to the north of Pembrokeshire.

3.3 Pembrokeshire Coast National Park retail centres are largely located within the settlements of Tenby, Saundersfoot, Newport, Solva and St Davids and serve both the local community and tourists.

3.4 The SW Wales Regional Retail Study examined the role and function of centres within the Authority areas of Pembrokeshire, Pembrokeshire Coast National Park and Ceredigion and taking account of the findings of the market share analysis, healthcheck assessment and capacity assessments, recommended the following retail hierarchy of centres. This hierarchy does not take account of the potential retail strategy for centres within Local Development Plans i.e. their future roles.

Level 1 – Sub-Regional Centres:	Aberystwyth and Haverfordwest
Level 2 – Primary Town Centres:	Cardigan, Lampeter, Pembroke, Pembroke Dock and Tenby
Level 3 – Secondary Town Centres:	Fishguard, Milford Haven and Narberth
Level 4 – Tertiary Town Centres:	Aberaeron, Saundersfoot and St Davids
Level 5 – Local Service Centres:	Llandysul, Newport and Tregaron

4. Pembrokeshire County Council Retail Centres

Masterplans and Regeneration Strategies

Masterplans and Regeneration Strategies have been published for the following town centres

Fishguard and Goodwick Strategic Regeneration Framework, April 2019

Pembroke Strategic Regeneration Framework, February 2018

Pembroke Dock Strategic Regeneration Framework, February 2018

Milford Haven DRAFT Strategic Regeneration Framework, July 2018

Haverfordwest, A Vision for the Future, Part A and Part B, August 2016

Tenby[7] Strategic Regeneration Framework, February 2018

4.1 They seek to galvanise positive change in town centres and environs over the next 5-10 years. They generally identify key assets, enhancement, movement,

[7] Tenby Strategic Regeneration Framework is published within the Council's Cabinet papers (item 17) held on 19th March 2018

heritage and tourism, employment and skills opportunities and Flagship projects. Action Plans help to focus on recommended actions.

Retail Data

4.7 A range of information is provided for each retail and commercial centre and significant out-of-centre locations within Pembrokeshire (outside of the National Park). This evidence provides the context for review of the retail strategy within LDP2, including a locally defined hierarchy of centres, the application of primary and secondary frontages, centre boundaries and where appropriate allocation of retail sites. The data will therefore influence both spatial definition and retail policy approach within LDP2.

Annual Retail Surveys

4.8 This report draws on the Annual Retail Survey's undertaken by the Authority to provide data for town centres including mix of uses, trends in occupancy, betting shop and charity shop numbers. Surveys are available for 2017 to 2019 and include limited historic trends.

Regional Retail Capacity Study, Feb 2017

4.9 In order to provide a robust evidence base, and in recognition of the cross-boundary nature of retail activity, this study covers the Authority planning areas of Pembrokeshire County Council, Pembrokeshire Coast National Park Authority and Ceredigion County Council.

4.10 The Regional Retail Study (February 2017) was prepared to inform the Local Development Plan review[8]. The Study includes information on existing shopping patterns, a Health Check of Town Centres, A Quantitative Needs Assessment for Convenience and Comparison (including Bulky Goods) retail floorspace upto 2036, and a suggested Retail Hierarchy.

4.11 Key findings for Pembrokeshire are -

Convenience Capacity. There is no forecast capacity for convenience floorspace within Pembrokeshire over the study period due to existing commitments.

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[8] Regional Retail Capacity Study, February 2017. Prepared by Carter Jonas on behalf of Pembrokeshire County Council, Ceredigion County Council and Pembrokeshire Coast National Park Authority

Comparison Capacity. For Comparison goods floorspace, the capacity based on constant market shares, is as follows

Included when need occurs and whether bulky goods

- Haverfordwest There is no comparison floorspace capacity in the medium term (upto 2026); in the longer term to 2036 capacity emerges for up to 2,916[9] sq m net new comparison goods floorspace, including bulky goods.
- Milford Haven. There is no capacity for new retail floorspace after taking account of pipeline development at Milford Haven Marina.
- Pembroke Dock and Pembroke Town. No capacity is identified in either centre for additional convenience floorspace as a result of low expenditure retention (Pembroke) or planned floorspace (Pembroke Dock). Forecast need for new comparison floorspace shows that some 217 sq m of net new floorspace is identified for Pembroke compared with 713 sq m net for Pembroke Dock by 2036.
- Fishguard Forecast need for new retail floorspace is largely confined to potential opportunities for new comparison goods floorspace. Forecast need for new comparison floorspace shows that some 273 sq m of net new floorspace is identified for Fishguard. There is a qualitative need to maintain/improve the retail offer and leisure offer in the town to ensure it remains attractive to the tourist trade and support the overall vibrancy, attractiveness and viability of the centre.
- Narberth No forecast need for new retail floorspace is identified for Narberth after taking account of planned development.

4.12 Sites with planning permission for retail development are identified within Appendix 3. This appendix will be updated when required.

Town Centre Health Check Assessments

4.13 The Health Check Assessments for Pembrokeshire town centres are published within the SWW Regional Retail Study at Local Development Plan 2 Evidence Base, Appendices 12-14. In summary the health checks find

- Haverfordwest The town centre is vulnerable to changes in the retail market and from the pressures of out of centre development and leakage to online shopping and competitor centres (e.g. Carmarthen). Investment in the town centre is essential to secure the centre's future. However, continued pressure for further out of centre retail and leisure development is likely to draw more expenditure away from the town centre and undermine investor confidence.

[9] The SWW Regional Retail Report Executive Summarise erroneously identifies this capacity as 4,059 sq m.

Identified capacity for new retail floorspace in Haverfordwest should be directed to the Haverfordwest Town Centre as a priority.

- Milford Haven Town Centre is struggling, particularly in terms of its retail function. Demand for new retail in Milford Haven is likely to be limited due to the proximity of Haverfordwest and it's out of centre shopping offer, as well as out of centre shopping facilities in Pembroke Dock. Investment in the centre is critical and while the Marina offers the potential to develop Milford Haven's tourism economy, potential opportunities to promote the town centre should be supported. This could involve diversifying the offer towards the leisure sector or seeking to develop a specialist, complementary retail offer.

- Pembroke and Pembroke Dock. Key differences between the two centres but the close proximity of the two means that their futures need to be considered together. The location of any further retail development needs to be reviewed in the context of the wider plans for the towns and the availability of sites. While both centres are identified as Primary Key Settlements in the WSP alongside Haverfordwest and Milford Haven, it is evident that Pembroke Town Centre under-performs in terms of its comparative shopping function.

- Fishguard. The town centre is generally healthy but is clearly continuing to experience difficult times with above average vacancies and a relatively high number of charity/community shops. It will be important to ensure that prominent vacant units are redeveloped/brought back into use (Primary school/Ship and Anchor site and Abergwaun Hotel) to maintain/increase investment confidence and secure the future health of the centre. The potential to further develop visitor trade may assist with this.

- Narberth is a healthy and attractive centre that has an established reputation for its retail and service offer. Low vacancies and a good range of shops and services appeal to residents and visitors alike. The lack of vacant space and popularity of the town suggest that there is likely to be demand for further retail provision in the town and the former school site remains a good development opportunity to increase the attractiveness of the centre.

4.14 Where appropriate and to ensure a comprehensive and accessible approach to key policy decisions, the Regional Capacity Study conclusions are replicated within in this background paper. The Capacity Study remains a published Evidence Paper for the review of the Local Development Plan.

5. LDP Town and Local Centres

5.1 Existing retail and commercial centres within Pembrokeshire are considered to retain a combination of uses and services which allow them to fall within a hierarchy of centres. These centres are at Haverfordwest, Milford Haven, Fishguard, Pembroke, Pembroke Dock, Narberth, Goodwick, Letterston, Kilgetty, Johnston, Crymych and Neyland.

Vacancy Rates within Town Centres

2014	2015	2016	2017	2018	2019
UK national vacancy rate 13.9% (Source: Local Data Company, December 2013)	UK national vacancy rate 13.2% (Source Local Data Company December 2014)	UK national vacancy rate 12.5% (Source: Local Data Company, January 2016)[10]	UK national vacancy rate 12.7% (Source Local data Company, December 2016)	UK national vacancy rate 12.2% (Source Local Data Company, 2nd Q 2017	UK national vacancy rate 12.4% (Source Local Data Company, November 2018
Haverfordwest 9%	Haverfordwest 17%	Haverfordwest 18%	Haverfordwest 25% (16%)[11]	Haverfordwest 17%	Haverfordwest 17%
Pembroke Dock 10%	Pembroke Dock 15%	Pembroke Dock 19%	Pembroke Dock 22%	Pembroke Dock 26%	Pembroke Dock 25%
Milford Haven 14%	Milford Haven 21%	Milford Haven 18%	Milford Haven 20%	Milford Haven 23%	Milford Haven 19%
Pembroke 9%	Pembroke 6%	Pembroke 7%	Pembroke 12%	Pembroke 10%	Pembroke 9%
Fishguard 10%	Fishguard 9%	Fishguard 16%	Fishguard 15%	Fishguard 20%	Fishguard 17%
Narberth 4%	Narberth 2%	Narberth 2%	Narberth 6%	Narberth 6%	Narberth 9%

Commercial Mix of Occupied Units

5.2 Within town centres, there is the potential for a range of uses to occupy commercial property. The balance of uses can be a reflection of planning policy, the role of the centre and its vibrancy and over time, can provide an indication of its future role. The following provides a breakdown of occupied A class units within town centres in 2019.

[10] LDC report that the reduced national vacancy rate is driven by a decrease in the number of units becoming vacant along with an above average number of units being removed from the overall stock.
[11] Vacancy rate inflated by redevelopment underway within the town centre

Centre	A1 use class No.	%	A2 use class No.	%	A3 use class No.	%	Total
Fishguard	45	59	10	13	22	29	77
Haverfordwest	120	65	39	21	25	14	184
Milford Haven[12]	46	57	14	17	20	26	102
Pembroke	57	59	18	19	22	23	97
Pembroke Dock	55	66	16	19	13	15	84
Narberth	52	63	10	13	20	25	82
Totals	375		107		122		626

**this does not include mixed use units*

5.3 Within occupied town centre units, the balance of commercial uses between A1, A2 and A3 uses varies considerably, with Haverfordwest demonstrating its role as the administrative centre (A2) of the county with 21% of it A use class units occupied by financial and professional services. There is however a relatively limited occupation (14%) by A3 uses including cafes, bars and restaurants at the ground floor at Haverfordwest. The spatial distribution of commercial uses, including vacancies, primary and secondary retail frontages within the Local Development Plan town centres are shown at Appendix 2.

Local centres

5.4 Local Retail Centres are identified within the Local Development Plan at Goodwick, Neyland, Crymych, Letterston, Johnston, and Kilgetty. These centres continue to provide for local shopping needs, and accord with the characteristics of lower order centres set out in TAN4 'Retail and Commercial Development' (Para 4.3).

5.5 A summary of the use classes and floorspace found at Local Centres in 2017 is at Appendix 1B. The 2017 survey confirms that the range and choice of services within these centres is largely limited to local needs and supports a local community. Several of the local centres do however serve a wider rural hinterland, or have a specific role in serving passing or destination trade in the case of Fishguard Ferry port. (Goodwick Local Centre)

[12] Includes Milford Marina town centre units

5.6 The retail and commercial provision at settlements not identified within the Local Development Plan retail hierarchy as Local Centres was also assessed. Langwm, Lamphey and Clunderwen were considered. These settlements are not included as local centres due to their limited range of commercial units and the limited floorspace which they occupy.

6. Out of Centre Retail Development and Retail Parks

6.1 Existing out of centre retail development in Pembrokeshire is generally limited to A1 shops uses, including bulky goods retailing with ancillary A3 coffee shops located within several stores. Current trends include drive-thru coffee shops and redevelopment at petrol filling stations, has introduced a greater range of retail and food for sale.

6.2 Appendix 3 provides a summary of the main out-of-centre retail developments and retail commitments within Pembrokeshire at 2019. The range of uses at out-of-centre locations and retail parks is limited and does not support their inclusion within a retail and commercial centre hierarchy.

7. Candidate Sites

The following candidate sites have been submitted to the Council during the call for sites, or submitted as an additional candidate site during the Preferred Strategy consultation issued as part of the Local Development Plan review. The submissions will be assessed against national planning policy, including the retail and commercial development test of sequential test, compatibility with the LDP2 evidence base, including the South West Wales Regional Retail Study 2017 and town centre Regeneration Plans endorsed by the Authority.

Sites which suggest an element of retail or commercial development as part of their proposals are as follows -

Candidate site Ref	Site Name	Nearest Settlement	Proposed Use	Area hectares
024	Asda supermarket /	Pembroke Dock / Doc Penfro	Retail	0.35
076	North of former night club	Penally **/ P**enalun	Mixed Use - Hotel, Restaurant, Food and Drink, Retail /	2.61
102	North of Hayston View	Johnston	Mixed Use - Housing, Community building,	5.5

Candidate site Ref	Site Name	Nearest Settlement	Proposed Use	Area hectares
			Retail/Commercial Park, Offices /	
137	Land at Freemans Way /	Haverfordwest / Hwlffordd	Mixed Use - Housing, Food and Drink, Retail	7.72
154	North of Park House Court	New Hedges	Mixed Use - Housing, Hospital Expansion, Hotel, Food Retail/Pub /	2.44
204	Land at Glanafon Farm	Haverfordwest / Hwlffordd	Mixed Use - Housing, Retail, Professional Services, Food and Drink, Offices /	7.79
329	Adjoining A40, Tregroes	Fishguard / Abergwaun	Mixed Use - Housing, Retail, Commercial /	8.7
262	Former Library Dew Street - option 1	Haverfordwest / Hwlffordd	Mixed use - Housing, Retail, Food & Drink, Offices, Leisure /	1.36
334	Land at Castle Pill	Milford Haven / Aberdaugleddau	Mixed Use - Housing, Employment, Retail, Boat Yard, Leisure	2.74
337	Land at Criterion Way	Pembroke Dock / Doc Penfro	Mixed Use - Employment, leisure, retail, food and drink	1.68
342	Land at Kingswood, south of London Road	Pembroke Dock / Doc Penfro	Mixed Use - Provision for Non B Class Uses, including Retailing, Food and Drink and a Care Facility	2.33
281	Land at Eastgate Centre	Pembroke / Penfro	Mixed Use - Housing, Employment and Retail	0.22
284	Former Fishguard Primary School	Fishguard / Abergwaun	Mixed Use - Housing, Employment, Retail/Food and Drink, Community	1.61
288	Former Narberth School	Narberth / Arberth	Mixed Use - Housing, Employment, Retail/Food and Drink, Community	0.24
307	West of The Market, Merrick Owen Way	Pembroke Dock / Doc Penfro	Mixed Use - Housing, Employment, Retail/Food and Drink, Leisure	0.71
308	South Quay	Pembroke / Penfro	Mixed Use - Housing, Employment, Retail/Food and Drink, Leisure, Civic	0.5
445	Land at Western Way & Criterion Way	Pembroke Dock / Doc Penfro	Mixed Use - Housing, Employment, Retail/Food and Drink, Leisure	3.81

8. Summary and Conclusions

The changing role and nature of retail has impacted upon town and local centres within Pembrokeshire . When and how people shop has changed. Online shopping and competition from out-of-centre stores has significantly impacted on the attractiveness of town centres.

Centres within the County must adapt in order to remain hubs of social and economic activity and the focal point for a diverse range of other services supporting the needs of local communities and their wider catchments (Planning Policy Wales page 45). In some cases, centres will continue to decline and this must be managed in a way which retains essential local services for residents and supports sustainable transport options to access alternative centres.

The review of the Local Development Plan will need to consider

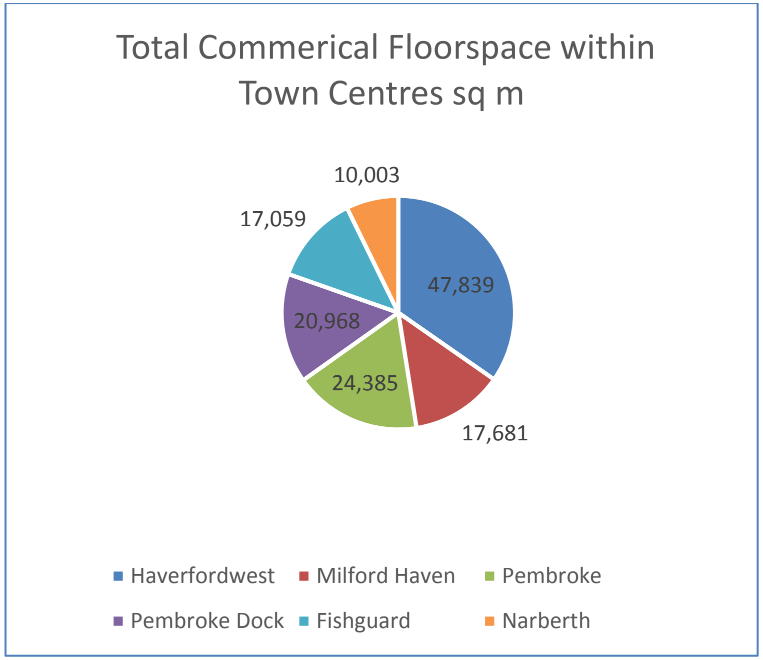
- Town centre boundaries
- The extent and location of primary and secondary retail frontages
- Positive policy approach to reduce long term vacancies
- Implementation of national policy to ensure proper consideration of out-of-centre proposals
- Support and enhancement of centres as identified within regeneration strategies endorsed by the Authority.

Appendices

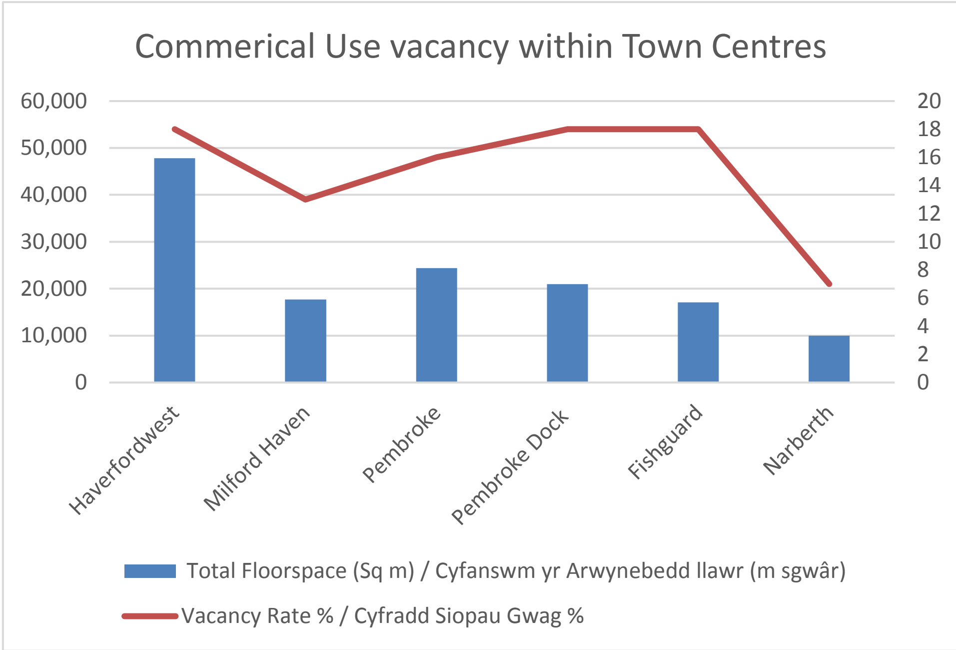
Appendix 1A : Summary of Commercial Use Classes within Town Centres[13] (March 2019 Retail Survey)

Town Centre	Haverfordwest	Milford Haven	Pembroke	Pembroke Dock	Fishguard	Narberth
Use Class[14]	Square metres (gross)					
Shops (A1) Use Class	25,010	6,707	9,789	13083	8,295	5,014
Financial & Professional Services (A2)	6,822	3,071	3,138	3041	1,405	1,155
Food and Drink (A3)	5,092	3,381	4,373	1868	3,936	2,573
Hotels (C1)[15]	1,404	1,185	1,056	0	398	348
Non residential institutions, Entertainment and Leisure, (D1, D2)	5,818	558	4294	2,748	2,608	863
Residential (C3)[16]	258	2 18	150	154	58	48
Sui Generis	2,881	2,174	1183	71	211	0
Unknown	809	0	268	0	0	0
Vacancy (% of floorspace)	8,922 18%	2,358 13%	3811 16%	3,617 18%	3,174 18%	708 7%
Total Floorspace	47,839	17,681	24385	20,968	17,059	10,003

[13] Excludes B class uses
[14] Occupied and vacant floorspace within the use class
[15] Surveys do not capture bed and breakfast or self catering establishments
[16] Residential uses generally not recorded within centre boundaries



Total Commerical Floorspace within Town Centres sq m
10,003
17,059
47,839
20,968
24,385
17,681
Haverfordwest
Milford Haven
Pembroke
Pembroke Dock
Fishguard
Narberth



Commerical Use vacancy within Town Centres
60,000
50,000
40,000
30,000
20,000
10,000
0
20
18
16
14
12
10
8
6
4
2
0
Haverfordwest
Milford Haven
Pembroke
Pembroke Dock
Fishguard
Narberth
Total Floorspace (Sq m) / Cyfanswm yr Arwynebedd llawr (m sgwâr)
Vacancy Rate % / Cyfradd Siopau Gwag %

Appendix 1B: LDP 1 Local Centre Uses 2017

Local Centre[17]	Letterston	Johnston	Neyland	Kilgetty	Crymych	Goodwick
Use Class[18]	Sq metres					
Shops (A1) Use Class	569	461	967	2273[19]	1423	496
Financial & Professional Services (A2)	150	0	303	0	190	74
Food and Drink (A3)	380	292	465	336	1101	696
Hotels (C1)	0	0	0	0	0	300
Non residential institutions, Entertainment and Leisure, (D1, D2)	0	0	939	0	455	0
Residential (C3) [20]	0	0	0	0	0	0
Sui Generis	0	2522[21]	69	2765	0	67
Unknown	0	0	0	0	0	0
Vacant (% of all floorspace)	0	90 3%	230 8%	50 1%	132 4%	0 0%
Total	1,099	3,275	2,744	5,424	3,228	2,513

[17] Units included where they have a cohesive relationship with the commercial hub of the local centre. Isolated uses, lacking a visual or interconnecting relationship with the core of the commercial area are excluded.

[18] Occupied and vacant floorspace within the use class, B use class excluded

[19] Floorspace enhanced by existing foodstore. Kilgetty does not however contain a range of services which would support its inclusion as a higher order centre.

[20] Residential uses generally not recorded within centres

[21] Includes large outdoor car showroom


A Use Classes within Small Retail Centres
3000
2500
2000
1500
1000
500
0
Square metres
Letterston
Johnston
Neyland
Kilgetty
Crymych
Goodwick
Retail Centres
Shops (A1)
Financial & Professional Services (A2)
Food and Drink (A3)

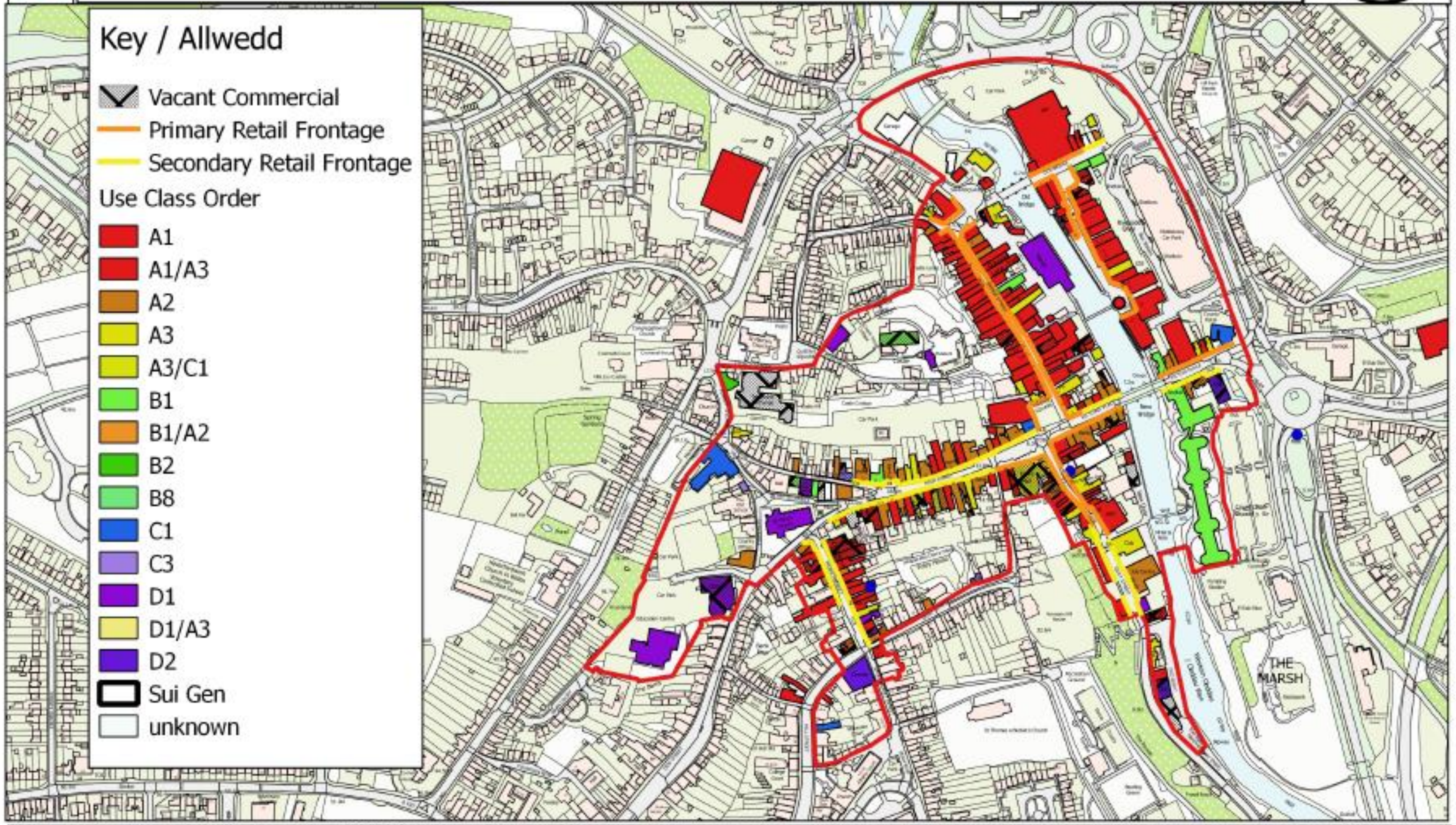
Appendix 2 Primary Retail Frontages (LDP1) at 2019

Haverfordwest

	Haverfordwest	**2019**		
PRF Ref	*Primary Frontage*	2019 PRF (m)	Non A1 (m)	non % A1
1	2-12 Old Bridge	50.9	0	0%
2	1-3 Old Bridge and 23-27 Riverside Quay	89.32	0	0%
3	2-21 Riverside Quay	165.31	14.33	8.6%
4	45 Swan Square	46.5	0	0%
5	Castle Hotel, 3 Castle Square and 2-44 Bridge Street	225	33.9	15%
6	2 Victoria Place, 5-7 Castle Square and 3-41 Bridge Street	210	53.9	25%
7	2a&b Quay Street and 1 - 17 Victoria Place	92.3	55.77	60%
8	2-20 Picton Place	70.69	46.87	66%
9	4 to Former Post Office, Quay Street	69.8	51	73%
10	Shire Hall & 45 High Street and 1-17 Quay St	119	66.01	55%

Haverfordwest / Hwllffordd 2019

Primary Retail Frontage / Blaen Adwerthu Eilradd

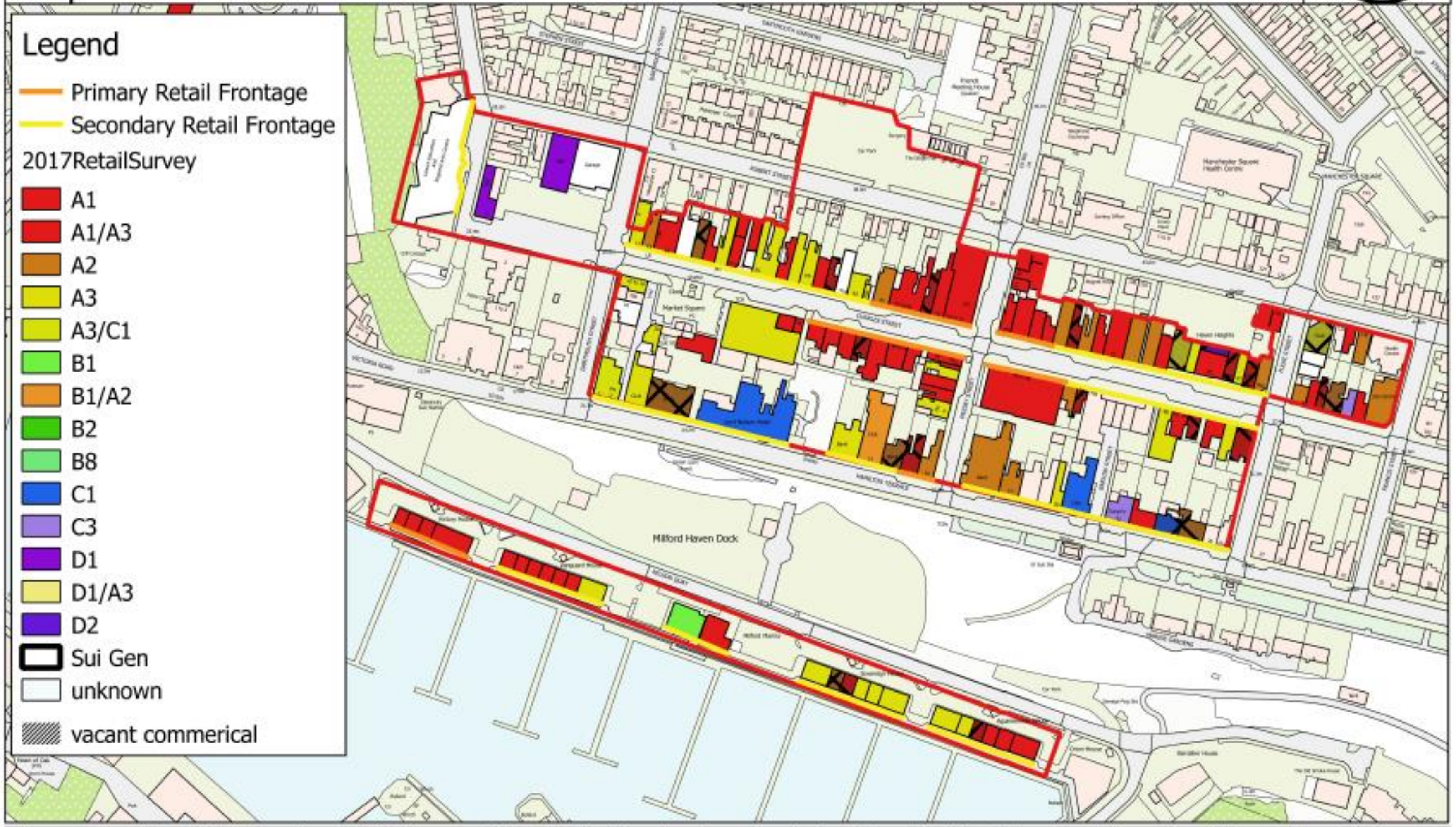


Milford Haven

	Milford Haven and Milford Marina	**2019**		
PRF Ref	*Primary Frontage*	2019 PRF (m)	Non A1 (m)	non % A1
11	13 & 14 Hamilton Terrace	16.22	7.76	47%
12	38-56 Charles Street	72.4	0	0%
13	~~47~~- 45-57 Charles Street	48	7.9	16%
14	58-66 Charles Street	36.2	0	0%
15	59-61 Charles Street	29.38	0	0%
16	Victory House Nelson Quay	39	0	0%

Milford Haven / Aberdaugleddau 2017

Primary Retail Frontage / Blaen Adwerthu Eilradd Nos. 11 - 16

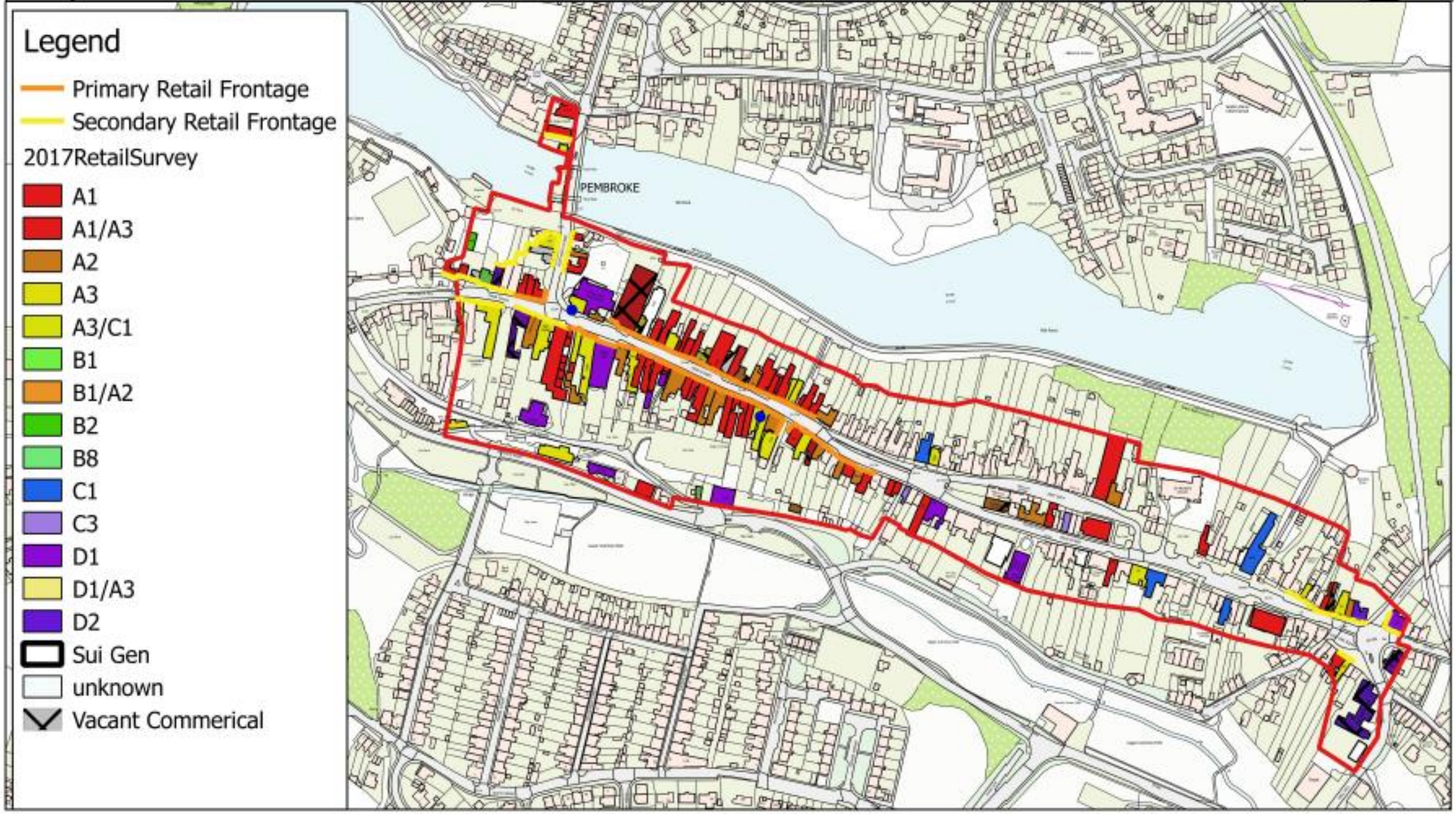


Pembroke

	Pembroke	**2019**		
PRF Ref	*Primary Frontage*	2019 PRF (m)	Non A1 (m)	non % A1
17	1-3 Castle Terrace	32.1	0	0%
18	6-10 Main St to 56 Main Street	174	68.9	40%
19	49-67 Main Street	88.2	44.49	50%
20	11-47 Main Street	204	128	62%

Pembroke / Penfro 2019

Primary Retail Frontage / Blaen Adwerthu Eilradd Nos. 17 - 20

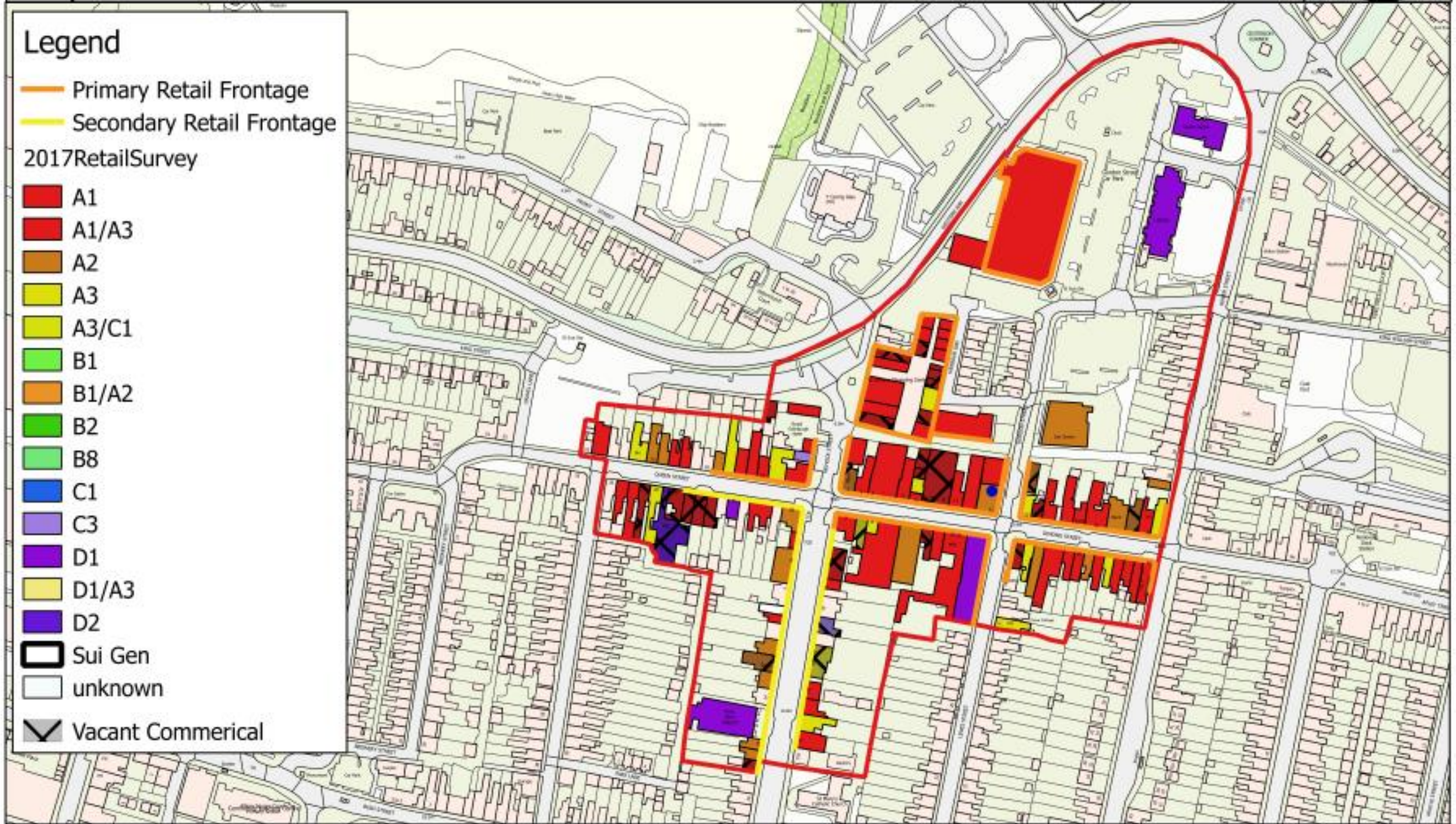


Pembroke Dock

	Pembroke Dock	**2019**		
PRF Ref	*Primary Frontage*	2019 PRF (m)	Non A1 (m)	non % A1
21	ASDA	215.7	0	0
22	St Govans Centre	251.8	12.5	5%
23	85-95 Queen Street & Part Meyrick St	85.88	30.91	36%
24	1-21 Dimond Street	147.7	50.83	34%
25	23-39 Dimond Street	120	75	62%
26	24-48 Dimond Street (50 Diamond St)	116	22.1	18%
27	2-22 Dimond Street	141.6	85.6	60%
27a	Gordon Street			0%

Pembroke Dock / Doc Penfro 2019

Primary Retail Frontage / Blaen Adwerthu Eilradd Nos. 21 - 27



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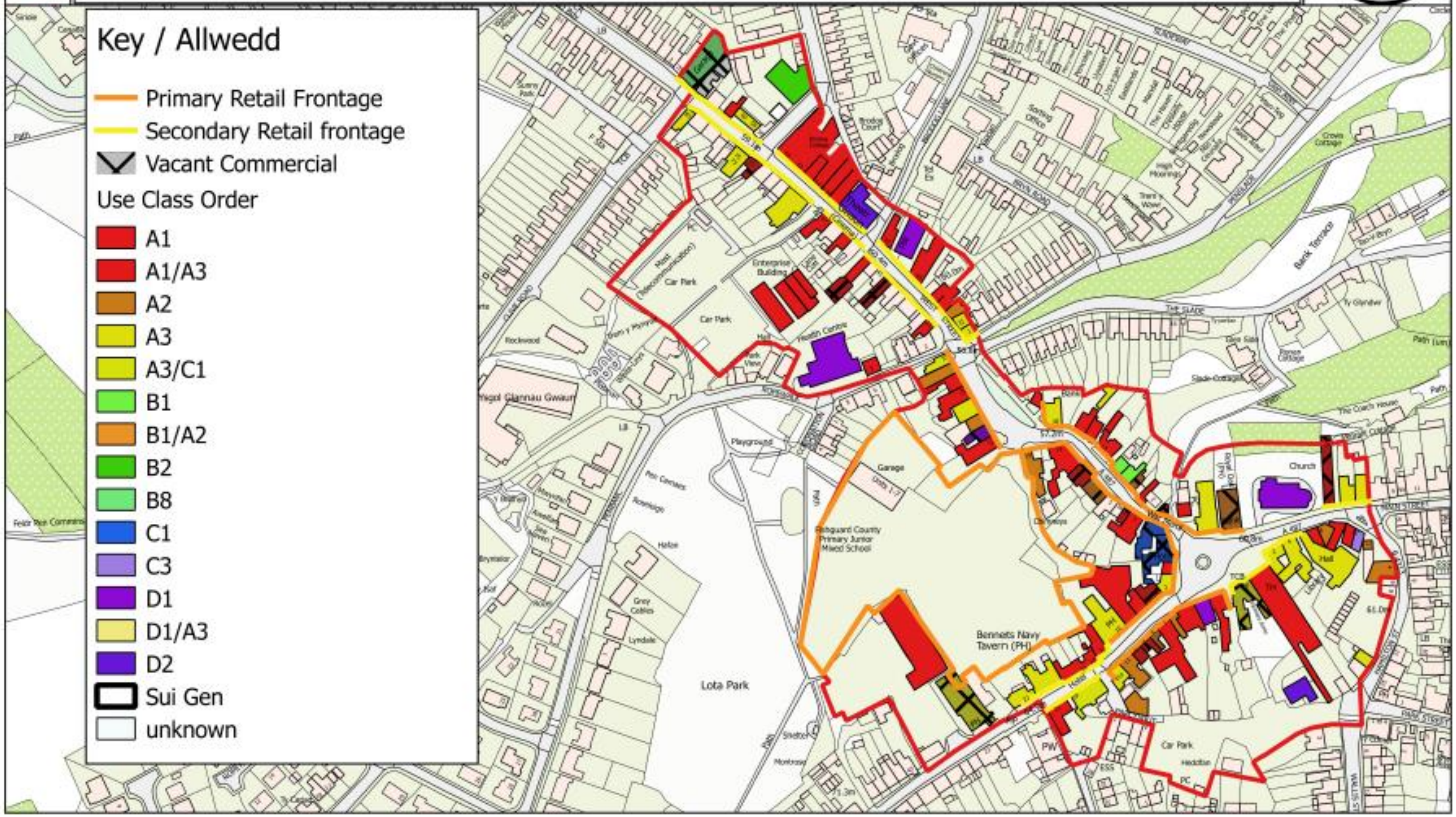
Fishguard

	Fishguard	**2019**		
PRF Ref	*Primary Frontage*	2019 PRF (m)	Non A1 (m)	non % A1
28	2-10 High Street, Abergwaun Hotel and 1-15 West Street	151[22]	77.9	51%
29	Castle & Victoria House(s), Market Square and 1-11a High Street	93.9	41	43%
30	2-18 West Street and Royal Oak & Barclays Bank, Market Square	111.2[23]	65	58%
31	17-31 West Street	59.7	35	58%

[22] Excludes residential uses and gaps in the frontage.

Fishguard / Abergwaun 2019

Town Centre Survey / Arolwg Canol Tref



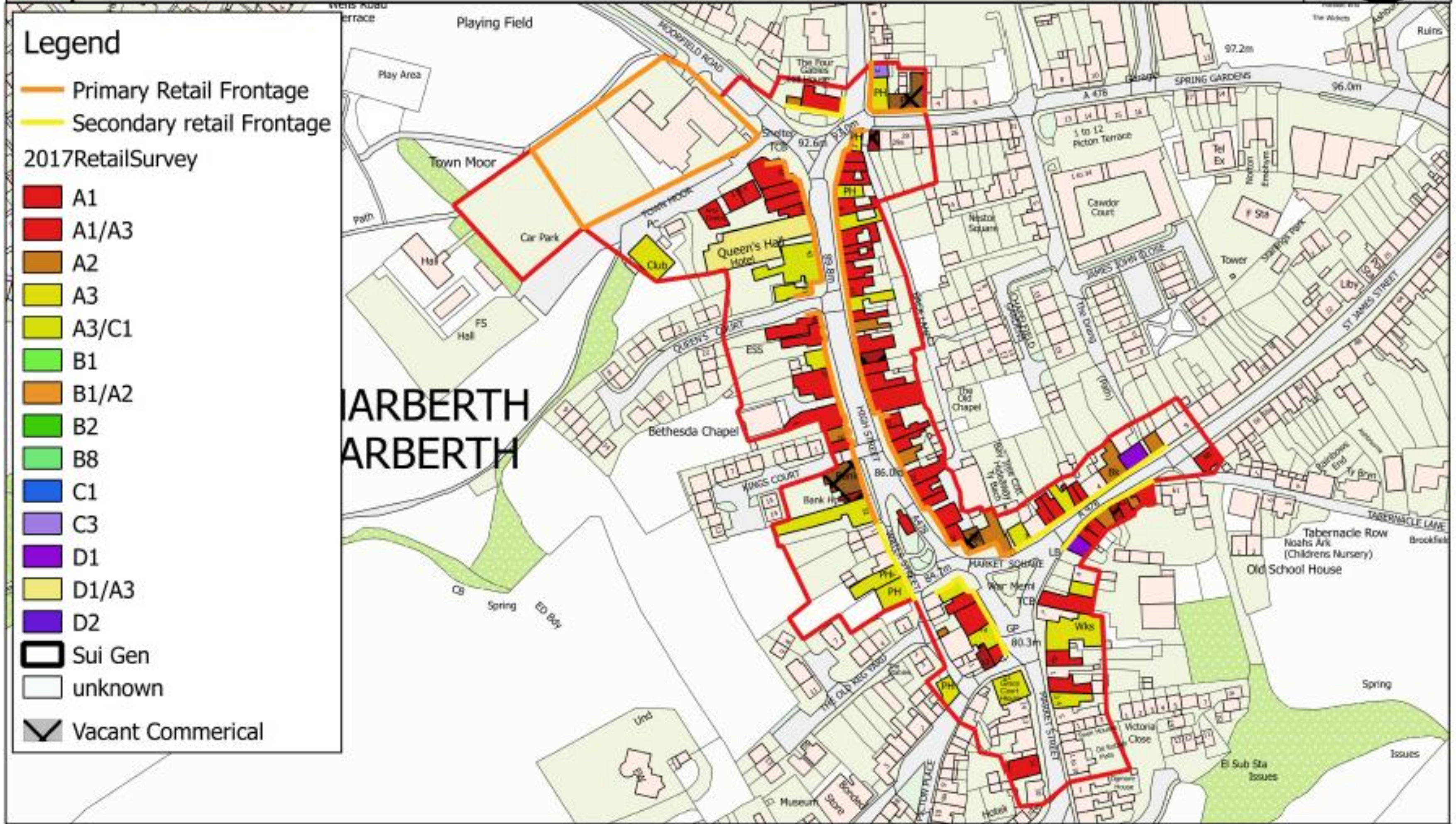
Narberth

	Narberth	**2019**		
PRF Ref	*Primary Frontage*	2019 PRF (m)	Non A1 (m)	non % A1
32	41-47 High Street	81.7	50.8	58%
33	32-40 High Street	101	42.49	41%
34	1 Northfield & 2-3 Spring Gardens	46.6	46.6[23]	100%
35	1-20 High Street	136	37.5	28%
36	21-29 High Street and 1-2 Market Square	102.6	38.2	37%

[23] Includes former A1 use now in use as residential

Narberth / Arberth 2019

Primary Retail Frontage / Blaen Adwerthu Eilradd Nos. 32 - 36



Appendix 3: Out of Centre Retail Development and Commitments (June 2019)

Out of Centre retail development, commitments, applications. Gross floorspace of 400 sq m has been taken as a minimum threshold for inclusion in this schedule. A1 UCO only.

Existing

STORE / LOCATION	Gross (sq M)[24]
Haverfordwest	
Tesco Extra	7581(g) + 646 mezzanine
Lidl	2339
Aldi	1,621
Bridge Meadow	
Halfords	775 (g) + 300 mezzanine
Vacant	1277
Allied Carpets	740
Morrisons foodstore	5825
Withybush Retail Park	
Unit 1 Marks and Spencers	2637 (g) 2500 mezzanine
Unit 2 Boots	982
Unit 3 Next	1252 incl. mezzanine
Unit 4 Laura Ashley	652
Unit 5 Oak Furniture Land	1102 incl. mezzanine
Unit 6 TK Maxx	1751 incl. mezzanine
Unit 7 Debenhams	2320 incl. mezzanine
Unit 8 Sports Direct	1021

[24] not gross internal floorspace

STORE / LOCATION	**Gross (sq M)**[24]
Springfield Retail Park	
Homebase	3717
Wickes	2500 (incl. Mezz area)
Carpetright	620
Topps Tiles	741
Pets at Home	747+238 mezzanine
DFS	989
Currys / PC World	1506
Fishguard Road	
Vincent Davies	4400 (grd floor) + 3000 mezzanine +200 ext.under 17/0175/PA
Merlin's Bridge	
City Plumbing	495
Jewson	1417
Screwfix	323
Tile and Bath Co	843
Ability Power	589
Snowdrop Lane	
Paul Sartori Stores	1,229
The Original Factory Shop	1,411
Snowdrop Lane Care & Mobility	486
Milford Haven	
Havens Head Retail Park	
Tesco	4283
Boots	331
Peacocks	963
Card World	265
vacant	550

STORE / LOCATION	Gross (sq M)[24]
Iceland Food Warehouse	942
Home Bargains	1,483
Pembroke Dock	
Tesco	6341
Lidl	1,490
Wilkinsons	1,600
Vacant - former Brantano	615
Argos	971
Peacocks	1,185
B&M Stores	3,039
Poundstretcher	928
Aldi	1,804
London Road Shopping Mall	2,362
Narberth	
CK Nisa foodstore	878
Goodwick / Fishguard	
Tesco Express – The Parrog Goodwick	450

Commitments

STORE / LOCATION	Planning Appn Ref	Consent	Net (sq m)	Gross (sq M) A1	Notes
Haverfordwest					
Slade Lane					
Foodstore and PFS	12/0830/PA, 12/0829/PA	31 Jan 2014	5,580 (no more than 2,230 sq m comparison)		Sainsbury's no longer named operator. See 16/0858/PA

STORE / LOCATION	Planning Appn Ref	Consent	Net (sq m)	Gross (sq M) A1	Notes
Milford Haven Marina					
Mixed Use Development up to 21,904 sq m	14/0158/PA	*resolution to approve awaiting Sec 106 to be signed Revised plans submitted 2018.		3,530	Demolition of a number of existing buildings and the mixed use redevelopment of Milford Waterfront comprising up to 26,266 sq m of commercial, hotel, leisure, retail and fishery related floorspace (Class A1, A2, A3, B1, B2, C1 and D2), up to 190 residential properties (Class C3), up to 70 additional marina berths, replacement boat yards, landscaping, public realm enhancements, access and ancillary works (all matters reserved other than primary access)
Pembroke Dock					
Former Development Centre London Road	16/0582/PA	16 Dec 16	827		Bulky goods