



Pembrokeshire County Council

Retail Survey Data

March 2017 survey

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1. Introduction and Summary

2. This document includes survey data and maps from a Pembrokeshire Town Centre Survey conducted in March 2017. The following Town Centres were surveyed:

- Fishguard
- Haverfordwest
- Milford Haven
- Narberth
- Pembroke
- Pembroke Dock

Please note that Pembrokeshire Coast National Park Authority (PCNPA) conducted the survey for town centres in their planning jurisdiction area. These have been added to this report and highlighted in grey. The PCNPA survey was conducted in July 2016.

3. The survey focused on those properties within the identified Pembrokeshire Local Development Plan (LDP) Town Centre boundary for these Town Centres. These boundaries are shown in the maps in section 2 of this report.
4. **For each property the following information was collected:**
 - Whether the ground floor was a commercial or residential property
 - Whether the ground floor was occupied or vacant
 - The use class of the ground floor using the Town and County Planning (Use Classes) Order 1987 (as amended).
5. Desk top analysis of maps has provided a gross floorspace for all retail units.
6. For vacant properties subsequent searches of historic planning files and previous surveys were used to determine the last known use class.
7. The tables in the analysis section include information on:

A Class use classes:

8. The numbers of properties that were identified as being A1, A2 or A3 within the use classes order. A1 uses are Shops of all types including supermarkets and retail warehouses. A1 uses also include hairdressers and sandwich bars (except those selling hot food) and show rooms.
9. A2 uses are those offering financial and professional services to visiting members of the public, including banks, building societies, estate agents and betting offices.

10. A3 uses are those food and drink outlets including restaurants, bars, pubs and take-aways.¹

Type of Class A property:

11. Disaggregating those units in A1, A2 and A3 use classes helps to provide a clearer picture of the type of service that that unit is providing. A1 units are generally comparison or convenience in nature, however some A1 uses offer services (such as a hairdresser or post office). A2 and A3 use classes are generally of a service nature. The types of unit are divided into the following:
- Comparison unit: Those units selling products of a durable nature to the general public. These are products such as clothing, electronics, music or books.
 - Convenience unit: Those units selling products of a non-durable nature to the general public. These are products such as food or toiletries.
 - Service unit: Those units offering a service to the general public. These are services such as hairdressers, betting shop or estate agent.

Summary of survey data

12. The percentage of vacant A class units have increased since January 2016 in six Town Centres - Haverfordwest, Milford Haven, Narberth, Pembroke and Pembroke Dock and at Milford Marina. The vacancy of A class uses has fallen within Fishguard town centre, but is still above the UK national average.
13. Vacancy at Haverfordwest is influenced by the Riverside Market which is currently being redeveloped. Excluding these units reduces the vacancy of A units at Haverfordwest town centre less than 2016 levels but still above the national average.
14. As in 2016 vacancy rates in Haverfordwest, Pembroke Dock, Milford Haven and Fishguard are above the National Average, and for the first time vacancy rates in Pembroke are also above the UK National Average. Centres which have a tourism role continue to perform well, particularly those in the National Park. Levels of betting shops are broadly consistent with levels in 2014 and 2016, with a slight reduction in betting shops in some centres. The number of charity shops has remained consistent since 2016 survey following a decline from 2014 levels.

¹ Please note the A3 use class has been further amended in England, however this amendment does not apply in Wales.

15. As in previous surveys many Pembrokeshire Town Centres have a larger proportion of service based units than the national average. In some instances this reflects the importance of tourism to a centre and indicates high levels of cafes and restaurants. In other cases it is indicative of a struggling town centre with low levels of comparison goods shopping provision.
16. The Regional Retail Study (2017) provided analysis of the relative strengths and weaknesses of Pembrokeshire's town centres, based on the 20016 retail survey, consultant's visits to the centres and a household telephone survey. The survey suggests that this analysis of the relative strengths and weaknesses of Pembrokeshire's Town Centres continues to be relevant, however Milford Haven, Pembroke Dock, Haverfordwest, Pembroke, Narberth and Milford Marina centres have all seen an increase in vacant units since 2016.

2.Data for Town Centres 2017

2.1 Number of Class A units

Town	A1 (occupied)	A2 (occupied)	A3 (occupied)	Mixed A class	Vacant A class	Total A class	% vacant (A class)	Total units vacant (all uses excluding residential)
Fishguard	46	14	21	2	15	98	15	20
Haverfordwest	116 ²	40	27	1	62/40 ³	246	25 /16 ⁴	78
Milford Haven	45	16	19	2	20	102	20	24
Milford Marina ⁵	13	1	3	0	4	21	19	4
Narberth	49	13	21	1	5	84	6	5
Pembroke	55	17	25	2	13	112	12	23
Pembroke Dock	59	15	12	0	24	110	22	24
Tenby	No break down available				7	182	4	No breakdown available
Saundersfoot					4	67	6	
St Davids					2	60	3	
Solva					0	13	0	
Newport					0	30	0	

17. The Riverside Market at Haverfordwest is currently undergoing redevelopment. It will form a library, art gallery and cafe when complete. Currently, however it accounts for a large number of vacancies within the town centre. Two vacancy percentage figures are shown which take into account vacant units at the Riverside Market and separately excluding the Riverside Market. This is to ensure appropriate trends can be established with previous surveys.

Note: Data is for ground floor units only.

UK Town Centre Vacancy rate: 11.5% in December 2016 (Source Local Data Company). Wales' vacancy rate for Town Centres was 14.6%.

² The Riverside Market is currently being redeveloped and accounts for a reduction in the number of occupied units within the town centre.

³ Vacancy Nos. including Riverside Market units / vacancy Nos. excluding Riverside Market units

⁴ % Vacancy rate including Riverside Market units / % Vacancy Rate excluding Riverside Market units

2.2 Class A units Ground Floor floorspace (gross m sq)

Floorspace	A1 (occupied) floorspace	A2 (occupied) floorspace	A3 (occupied) floorspace	Mixed A class (occupied)	Vacant A class	Grand Total
Fishguard	7347	1662	2998	404	2142	14553
Haverfordwest	21512	5685	3955	141	5853	37146
Milford Haven	5692	2775	2998	603	1964	14032
Milford Marina	1019	59	358	0	302	1738
Narberth	4242	1156	2962	686	395	9441
Pembroke	8487	2638	4376	360	1668	17529
Pembroke Dock	10014	2526	1511	0	3891	17942
Tenby	Data not available				853	21196
Saundersfoot					274	7009
St Davids					110	7387
Solva					0	1586
Newport					0	3910

2.3 2017 Type of Class A Units

A. Unit numbers

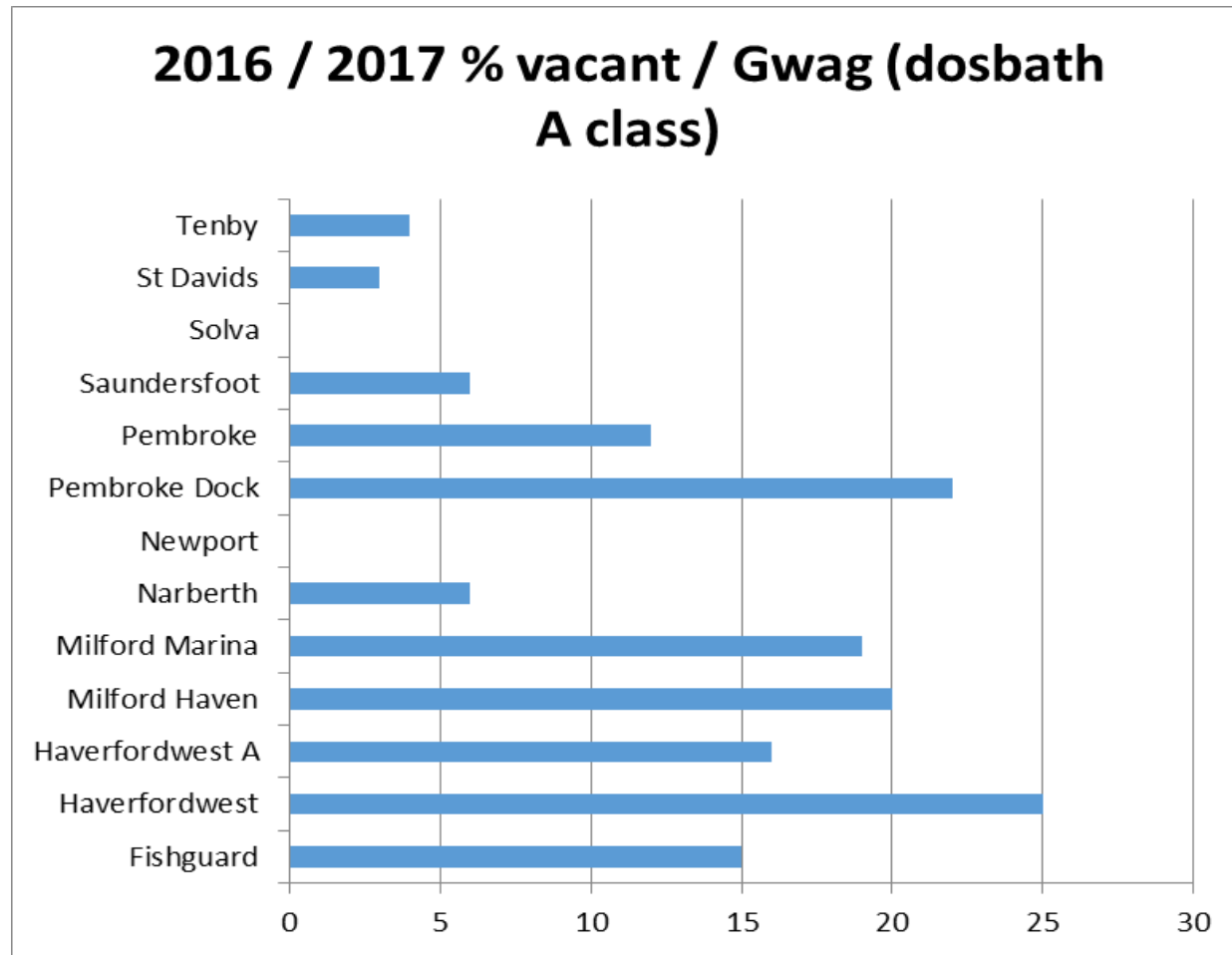
	Fishguard	Haverfordwest	Milford Haven	Milford Marina	Narberth	Pembroke	Pembroke Dock
2014 Comparison (occupied)	39	94	30	8	42	34	48
2016 Comparison (occupied)	35	103	30	9	40	35	45
2017 Comparison (occupied)	33	88	31	9	38	33	40
2014 Convenience (occupied)	4	2	3	0	4	4	1
2016 Convenience (occupied)	4	2	3	0	4	3	1
2017 Convenience (occupied)	4	4	3	0	4	5	5
2014 Service (occupied)	43	106	47	11	42	63	45
2016 Service (occupied)	45	100	49	9	43	65	44
2017 Service (occupied)	45	92	47	8	41	59	41
2014 Comparison/Service (occupied)	0	0	0	0	1	2	0
2016 Comparison/Service (occupied)	0	0	1	0	1	1	0
2017 Comparison / Service (occupied)	0		1	0	1	1	0
2016 Unknown (occupied)	0	0	0	0	0	1	0
2017 Unknown (occupied)	0	0	0	0	0	0	0
2014 Vacant	9	42	21	0	2	7	17
2016 Vacant	16	45	18	1	2	8	21
2017 Vacant	15	62 ⁶	18	4	5	13	24
2014 Total A class	95	244	101	19	91	109	111
2016 Total A class	100	250	101	19	90	113	111
2017 Total A class	98	246	102	22	89	110	110

⁶ Includes Riverside Market units

B. Floorspace

Town	Comparison Floorspace (occupied)	Convenience Floorspace (occupied)	Service Floorspace (occupied)	Comparison/Service Floorspace (occupied)	Unknown	Vacant	Total
Fishguard	5152	1629	5360	0	0	2142	14929
Haverfordwest	17881	1133	12279	0	0	5852	37145
Milford Haven	3696	985	7357	29	0	1964	14070
Milford Marina	775	0	662	0	0	303	1740
Narberth	3147	627	4585	685	0	395	9440
Pembroke	4494	1581	9621	164	0	1857	17717
Pembroke Dock	4712	3860	5479	0	0	3891	17942

2.4 Graph illustrating A Class Vacancy Rates for 2016/17



Haverfordwest A provides a vacancy rate excluding the Riverside Market units.

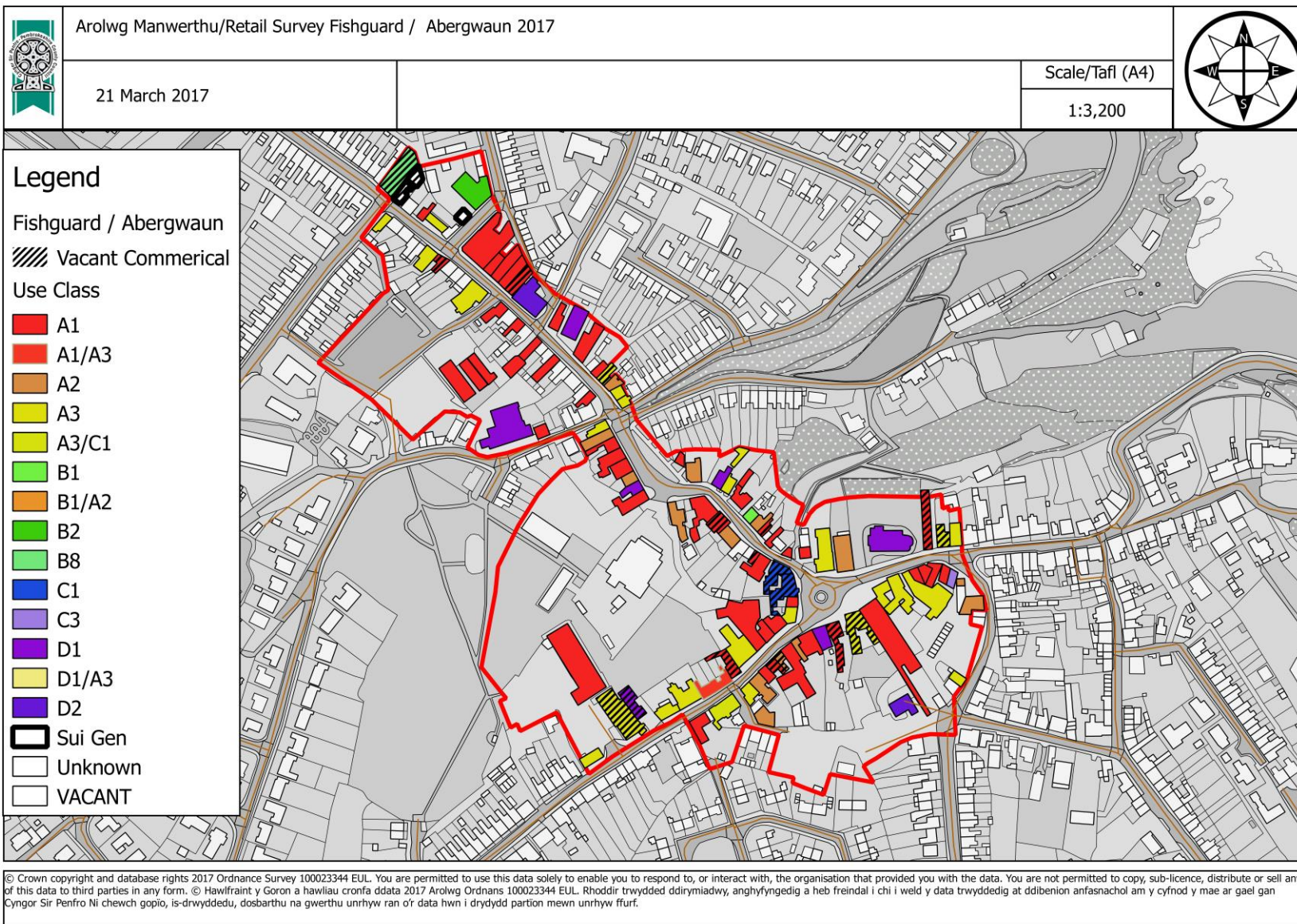
2.5 Changes in betting shops between 2009 and 2017 (only occupied units shown)

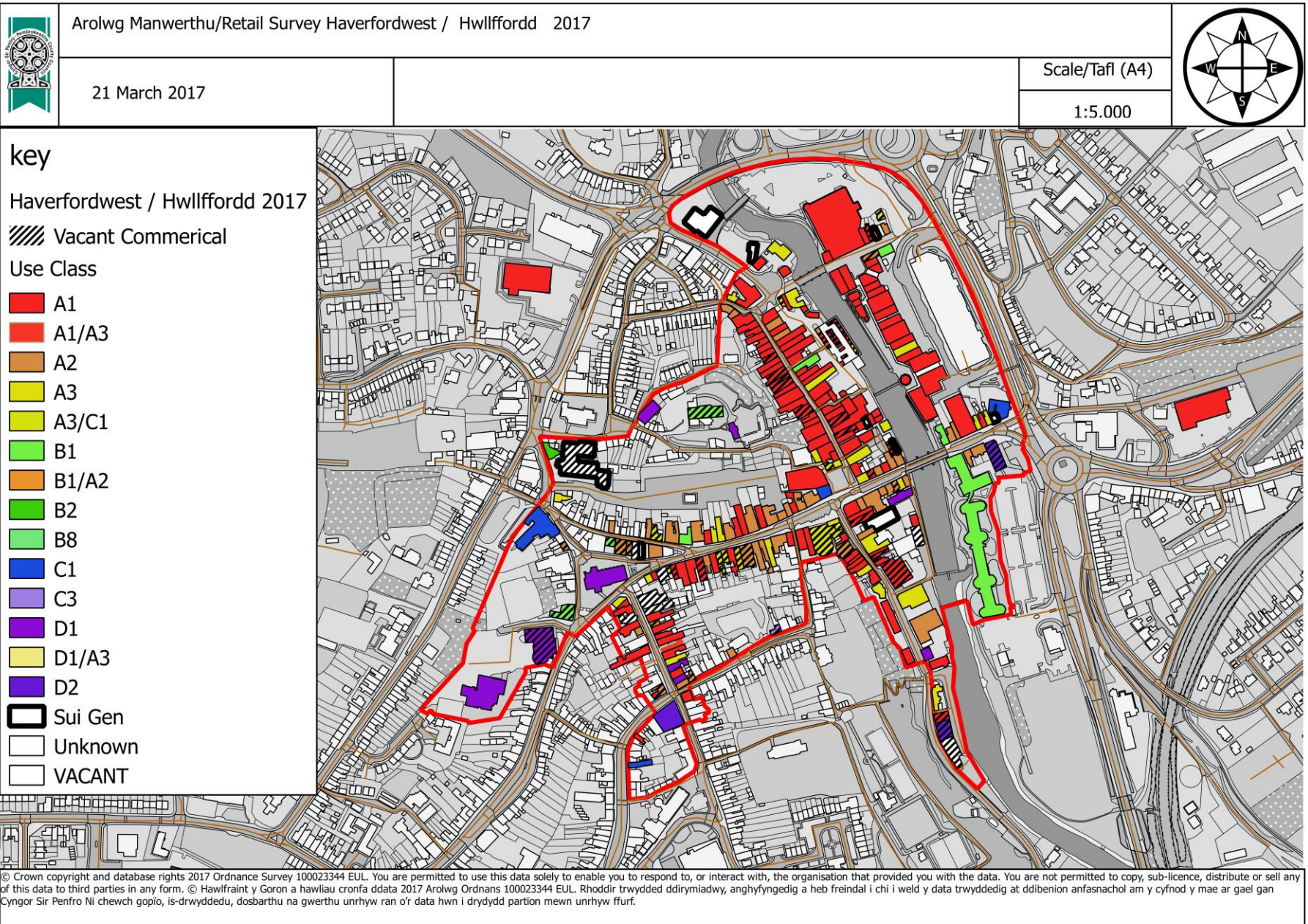
Betting shops Total Numbers							
Town	2009	2011	2012	2013	2014	2016	2017
Fishguard	1	1	1	1	1	1	1
Haverfordwest	2	2	2	2	2	3	3
Milford Haven	2	2	3	3	3	3	3
Narberth	0	0	1	2	1	1	1
Pembroke	1	1	1	2	2	2	1
Pembroke Dock	0	1	1	2	2	3	2
Total	6	7	9	12	11	13	11
Newport	0	0	0	0	0	0	0
Saundersfoot	0	-	0	0	0	0	0
Solva	0	-	-	0	0	0	0
St Davids	0	-	0	0	0	0	0
Tenby	2	2	2	3	3	2	2
Total	2	2	2	3	3	2	2
Grand Total	8	9	11	15	14	15	13

2.6 Changes in charity shops between 2009 and 2017 (only occupied units shown)

Charity shops							
Town	2009	2011	2012	2013	2014	2016	2017
Fishguard	1	2	3	3	3	2	4
Haverfordwest	8	9	9	11	12	11	11
Milford Haven	3	3	3	4	4	3	3
Narberth	0	3	3	3	3	3	2
Pembroke	4	4	4	4	4	4	4
Pembroke Dock	1	0	1	7	7	5	5
Total	17	21	23	32	33	28	29
Newport	-	-	0	0	0	0	0
Saundersfoot	0	-	0	0	0	0	0
Solva	-	-	-	0	0	0	0
St Davids	1	1	1	1	1	1	1
Tenby	5	6	6	4	4	4	3
Total	6	7	7	5	5	5	4
Grand Total	23	28	30	37	38	33	33

3. Town Centre Maps (see Appendices)



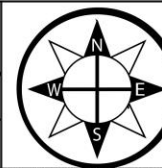




22 March 2017

Scale/Tafll (A4)

1:2,750



Key

/// Vacant Commerical

Use Class

- A1
- A1/A3
- A2
- A3
- A3/C1
- B1/A2
- C1
- C3
- D1
- D1/A3
- D2
- Sui Gen



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