



Pembrokeshire County Council

# Retail Survey Data

January 2016 survey

# Contents Page

<b>1. Introduction and Summary</b>	<b>3</b>
<b>2. Data for Town Centres</b>	<b>5</b>
<b>3. Maps</b>	<b>9</b>

# 1. Introduction and Summary

2. This document includes survey data and maps from a Pembrokeshire Town Centre Survey conducted in January 2016. 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 2015.*

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.<sup>1</sup>

**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 December 2014 in three Town Centres – Haverfordwest, Pembroke Dock and Fishguard. The rate in Milford Haven Town Centre has fallen slightly since December 2014, but is still above the National Average. As in 2014 vacancy rates in Haverfordwest, Pembroke Dock and Milford Haven are above the National Average, for the first time vacancy rates in Fishguard are also above the National Average. Centres which have a tourism role continue to perform well, particularly those in the National Park. Levels of charity and betting shops are broadly consistent with levels in 2013 and 2014, a slight reduction in charity shops in some centres has resulted in vacant units (Haverfordwest and Pembroke Dock).
13. 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.
14. The County Wide Retail Capacity Study (2010) provided analysis of the relative strengths and weaknesses of Pembrokeshire's town

---

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

centres, based on the 2009 retail survey and a household phone survey. The 2014 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 and Haverfordwest centres have all seen an increase in vacant units since that period.

## 2.Data for Town Centres 2016

### 2.1 Number of Class A units

Town	A1 (occupied)	A2 (occupied)	A3 (occupied)	Mixed A class	Va can t A cla ss	Total A class	%vacant (A class)	Total units vacant (all uses excluding residential)
Fishguard	47	14	21	2	16	100	16	19
Haverfordwest	134	43	27	1	45	250	18	63
Milford Haven	47	14	20	2	18	101	18	25
Milford Marina	13	2	3	0	1	19	5	2
Narberth	52	13	21	2	2	90	2	2
Pembroke	56	20	27	2	8	113	7	16
Pembroke Dock	63	17	10	0	21	111	19	24
Tenby	No break down available					182	3	6
Saundersfoot						65	8	5
St Davids						58	3	2
Solva						12	0	0
Newport						31	0	0

Note: Data is for ground floor units only.

UK Vacancy rate: 12.5% in January 2016 (Source: Local Data Company, January 2016)

### 2.2 Class A units Ground Floor floor space (gross m sq)

Floorspace	A1 (occupied) floorspace	A2 (occupied) floorspace	A3 (occupied) floorspace	Mixed A class (occupied)	Vacant A class	Grand Total
Fishguard	7577	1699	2843	406	2404	14929
Haverfordwest	23694	5921	3924	141	5943	39623
Milford Haven	5848	2412	3083	605	2122	14070
Milford Marina	1142	122	363	0	121	1748
Narberth	4455	1161	2972	839	72	9499
Pembroke	9187	3055	4609	360	666	17877
Pembroke Dock	10888	2665	1243	0	3315	18111
Tenby	Data not available				730	20850
Saundersfoot					408	6593
St Davids					229	7438
Solva					0	1460
Newport					32	3920

## 2.3 2016 Type of Class A Units

### A. Unit numbers

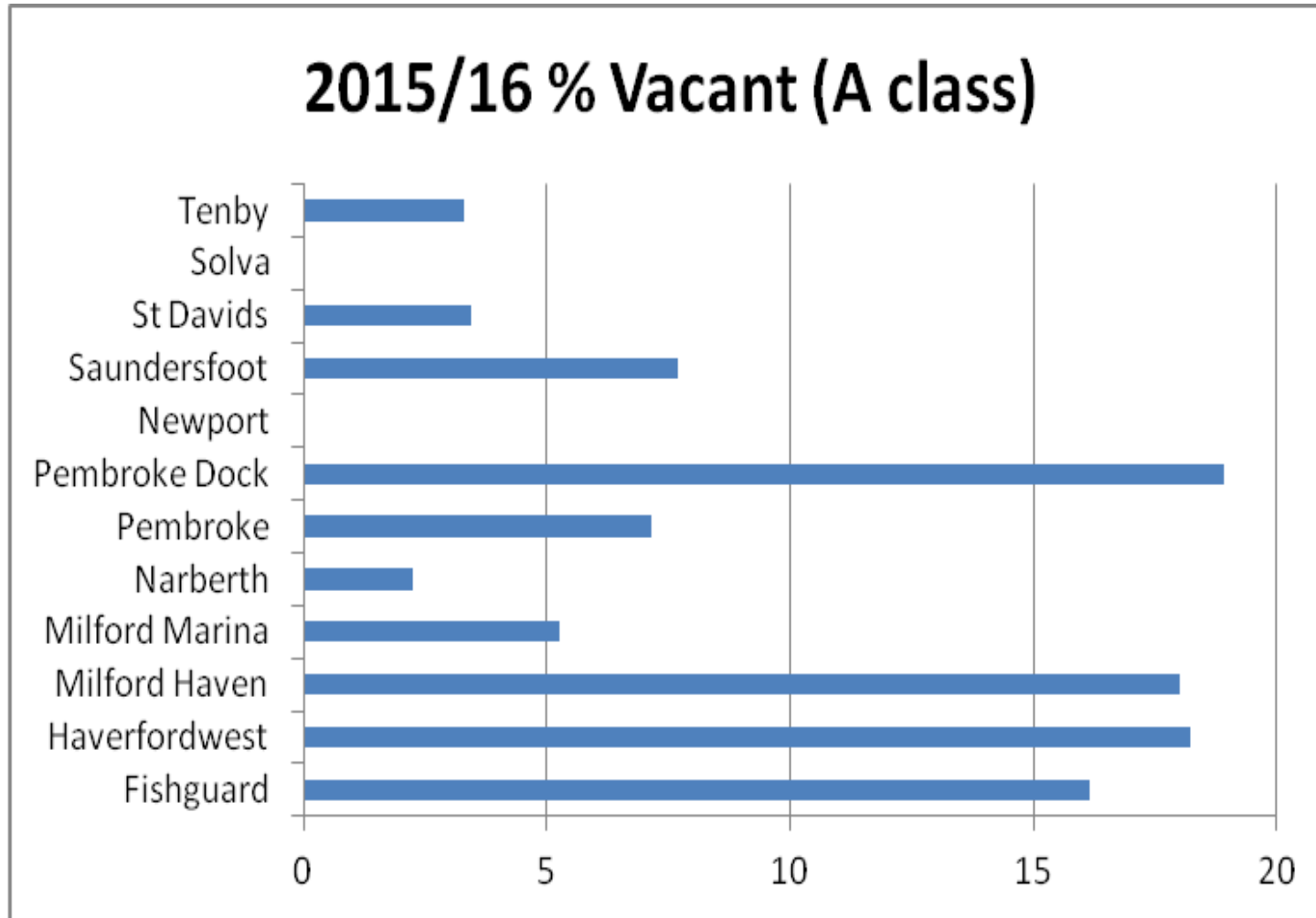
	Fishguard	Haverfordwest	Milford Haven	Milford Marina	Narberth	Pembroke	Pembroke Dock
<b>2014 Comparison (occupied)</b>	39	94	30	8	42	34	48
<b>2016 Comparison (occupied)</b>	35	103	30	9	40	35	45
<b>2014 Convenience (occupied)</b>	4	2	3	0	4	4	1
<b>2016 Convenience (occupied)</b>	4	2	3		4	3	1
<b>2014 Service (occupied)</b>	43	106	47	11	42	63	45
<b>2016 Service (occupied)</b>	45	100	49	9	43	65	44
<b>2014 Comparison/Service (occupied)</b>	0	0	0	0	1	1	0
<b>2016 Comparison/Service (occupied)</b>	0	0	1	0	1	1	0
<b>2016 Unknown (occupied)</b>	0	0	0	0	0	1	0
<b>2014 Vacant</b>	9	42	21	0	2	7	17
<b>2016 Vacant</b>	16	45	18	1	2	8	21
<b>2014 Total A class</b>	95	244	101	19	91	109	111
<b>2016 Total A class</b>	100	250	101	19	90	113	111

## B. Floorspace

Town	Comparison Floorspace (occupied)	Convenience Floorspace (occupied)	Service Floorspace (occupied)	Comparison/Service Floorspace (occupied)	Unkown	Vacant	Total
Fishguard	5428	1612	5485			2404	14929
Haverfordw est	19816	814	13050			5943	39623
Milford Haven	3607	989	7323	29		2122	14070
Milford Marina	897		730			121	1748
Narberth	3303	630	5343	151		72	9499
Pembroke	5445	1364	10100	165	137	666	17877
Pembroke Dock	6089	2857	5850			3315	18111



## 2.4 Graph illustrating A Class Vacancy Rates for 2015/16



## 2.5 Changes in betting shops between 2009 and 2016 (only occupied units shown)

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

## 2.6 Changes in charity shops between 2009 and 2016 (only occupied units shown)

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

### **3. Town Centre Maps (see Appendices)**





# Fishguard - Retail Survey 2016

Map produced on: 09 May 2016

Scale (A4 Print)

1:3.537

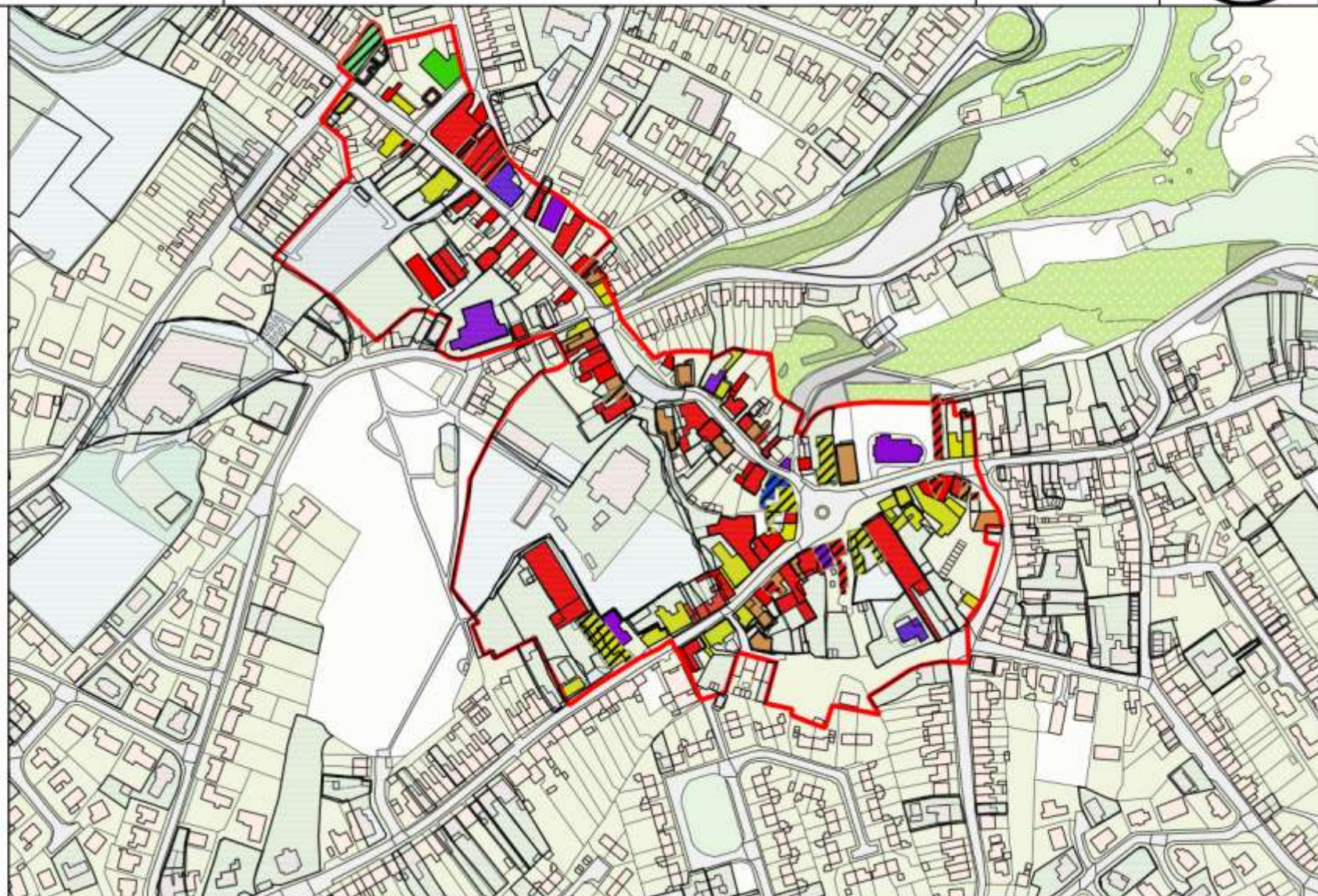


## Legend

### Vacant Properties

True  
2016RetailSurvey

- A1
- A1/A3
- A2
- A3
- A3/C1
- B2
- B8
- C1
- D1
- D2
- Sui Gen







# Haverfordwest - Retail Survey 2016

Map produced on: 09 May 2016

Scale (A4 Print)

1:5,012

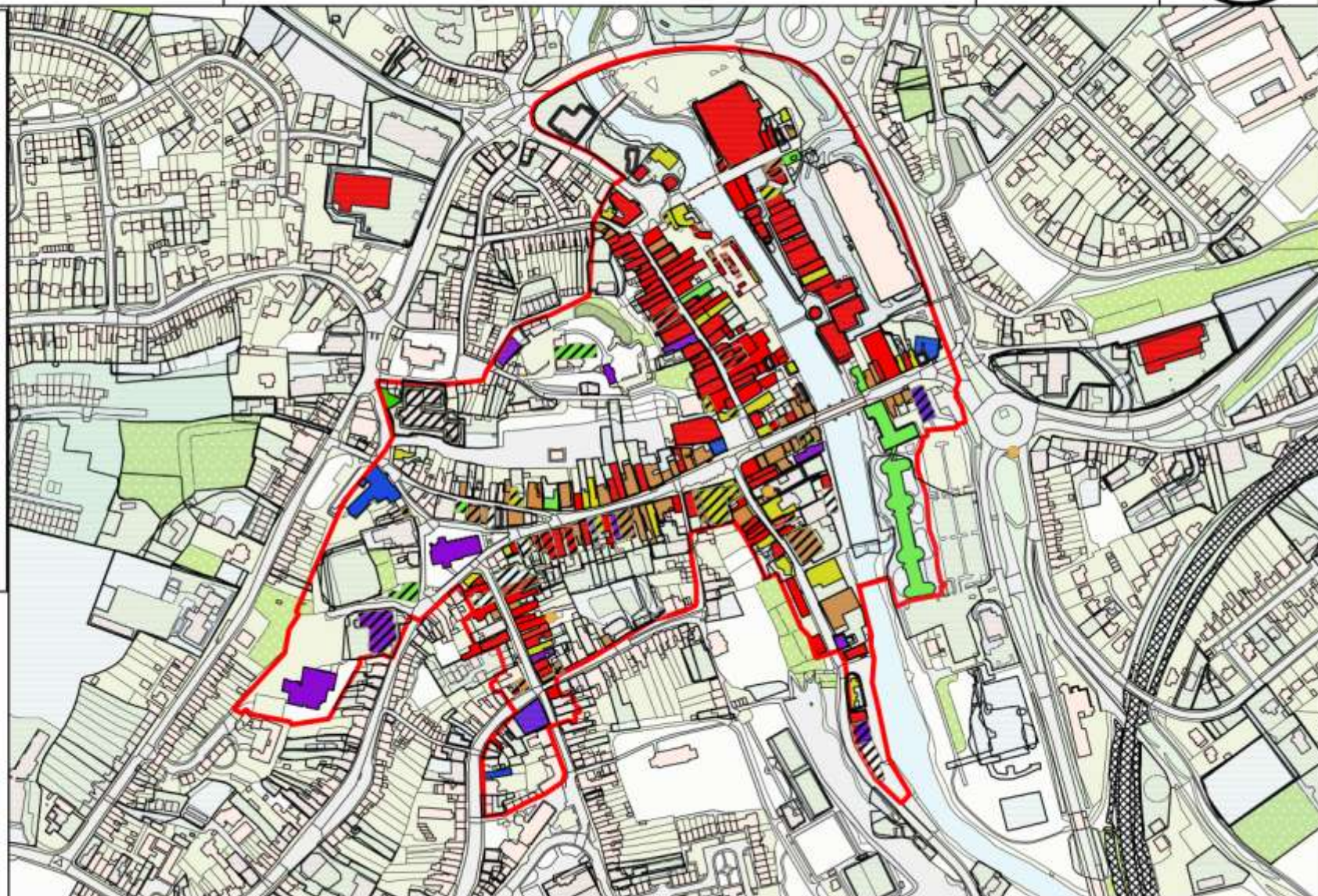


## Legend

### Vacant Properties

True  
2016RetailSurvey

- A1
- A1/A3
- A2
- A3
- B1
- B2
- C1
- C3
- D1
- D2
- Sui Gen
- Unknown
- VACANT







# Milford Haven - Retail Survey 2016

Map produced on: 09 May 2016

Scale (A4 Print)

1:3.616

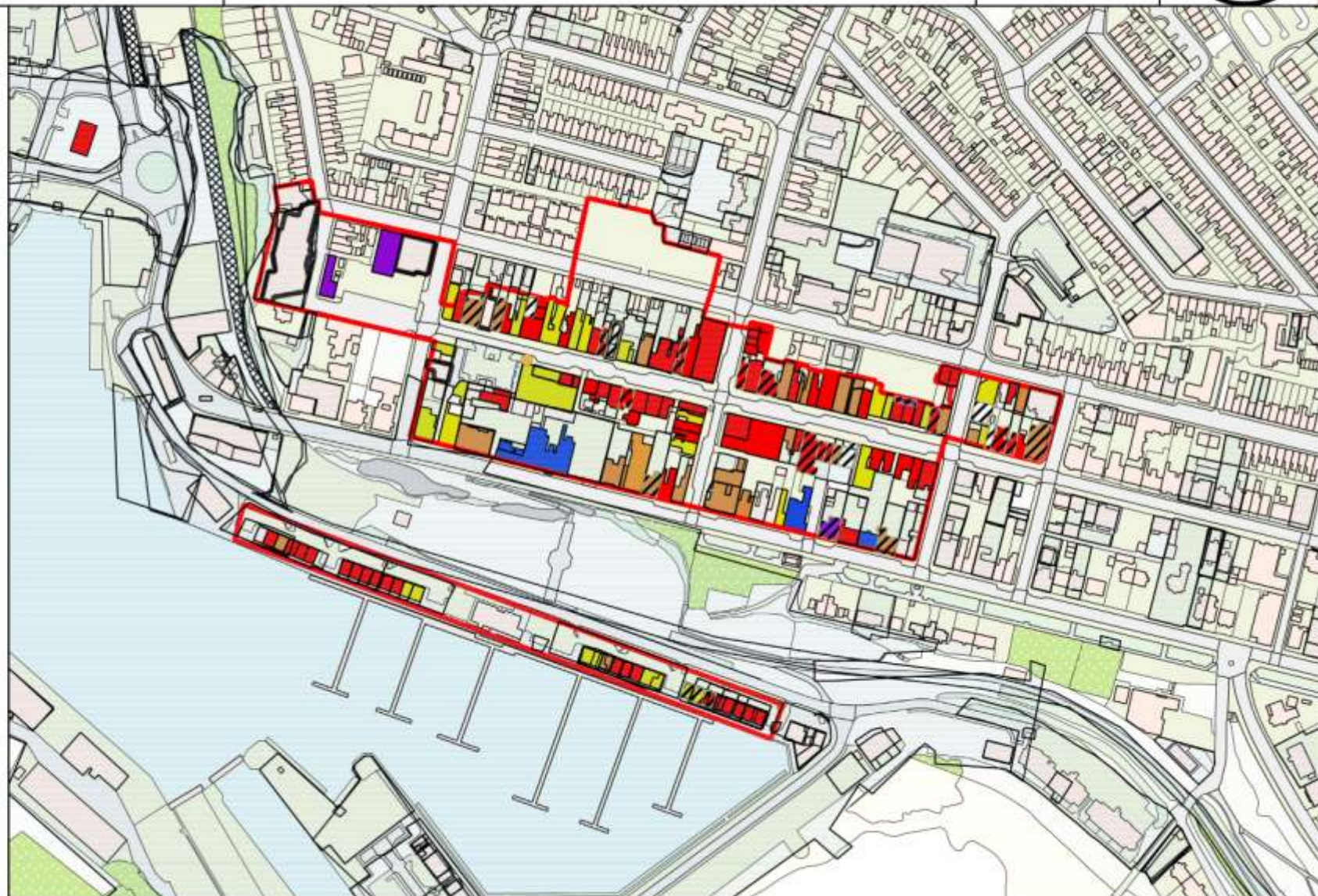


## Legend

### Vacant Properties

True  
2016RetailSurvey

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







# Narberth - Retail Survey 2016

Map produced on: 09 May 2016

Scale (A4 Print)

1:3.252

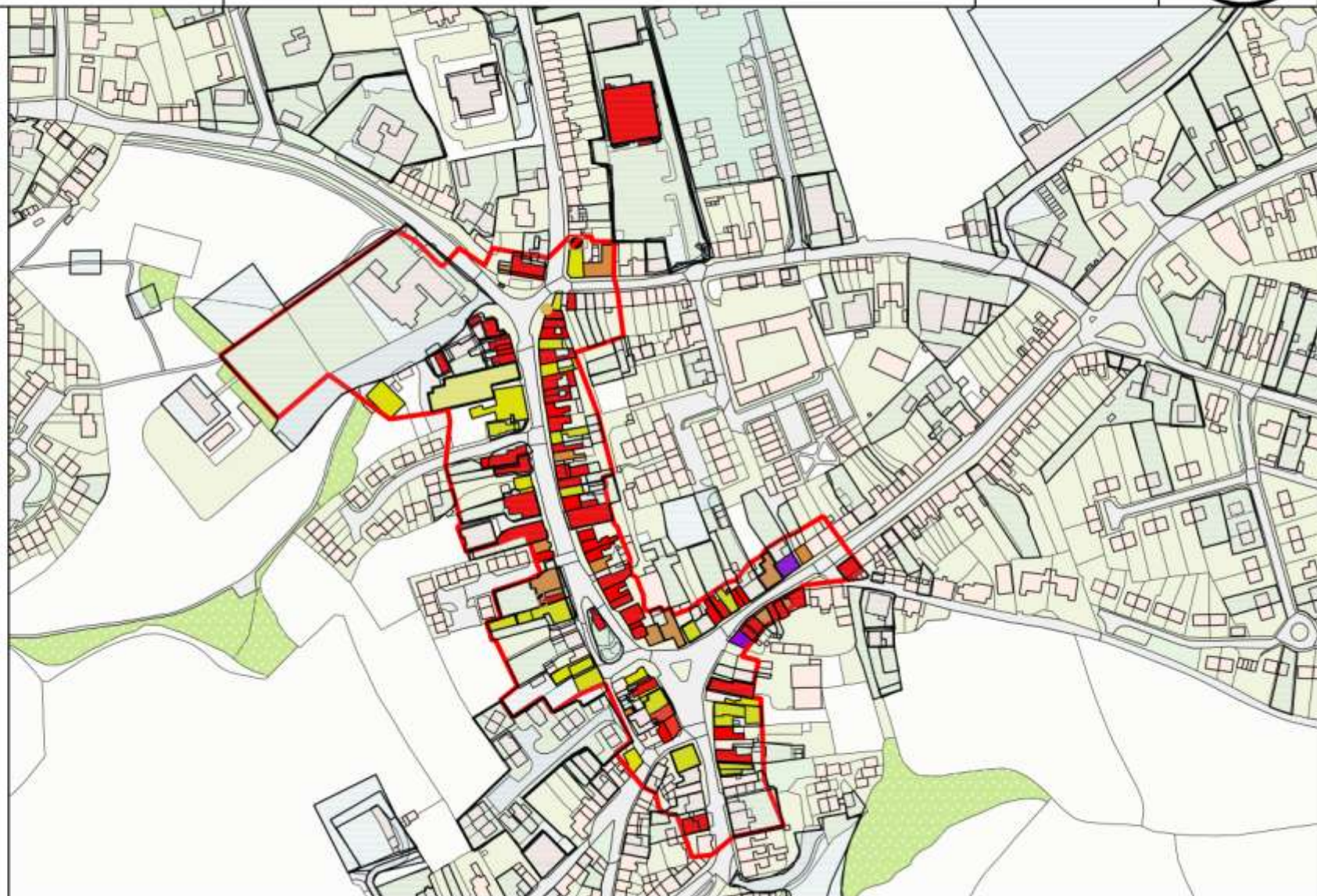


## Legend

### Vacant Properties

True  
2016RetailSurvey

- A1
- A1/A3
- A2
- A3
- D1
- D1/A3







# Pembroke Dock - Retail Survey 2016

Map produced on: 09 May 2016

Scale (A4 Print)

1:3.544

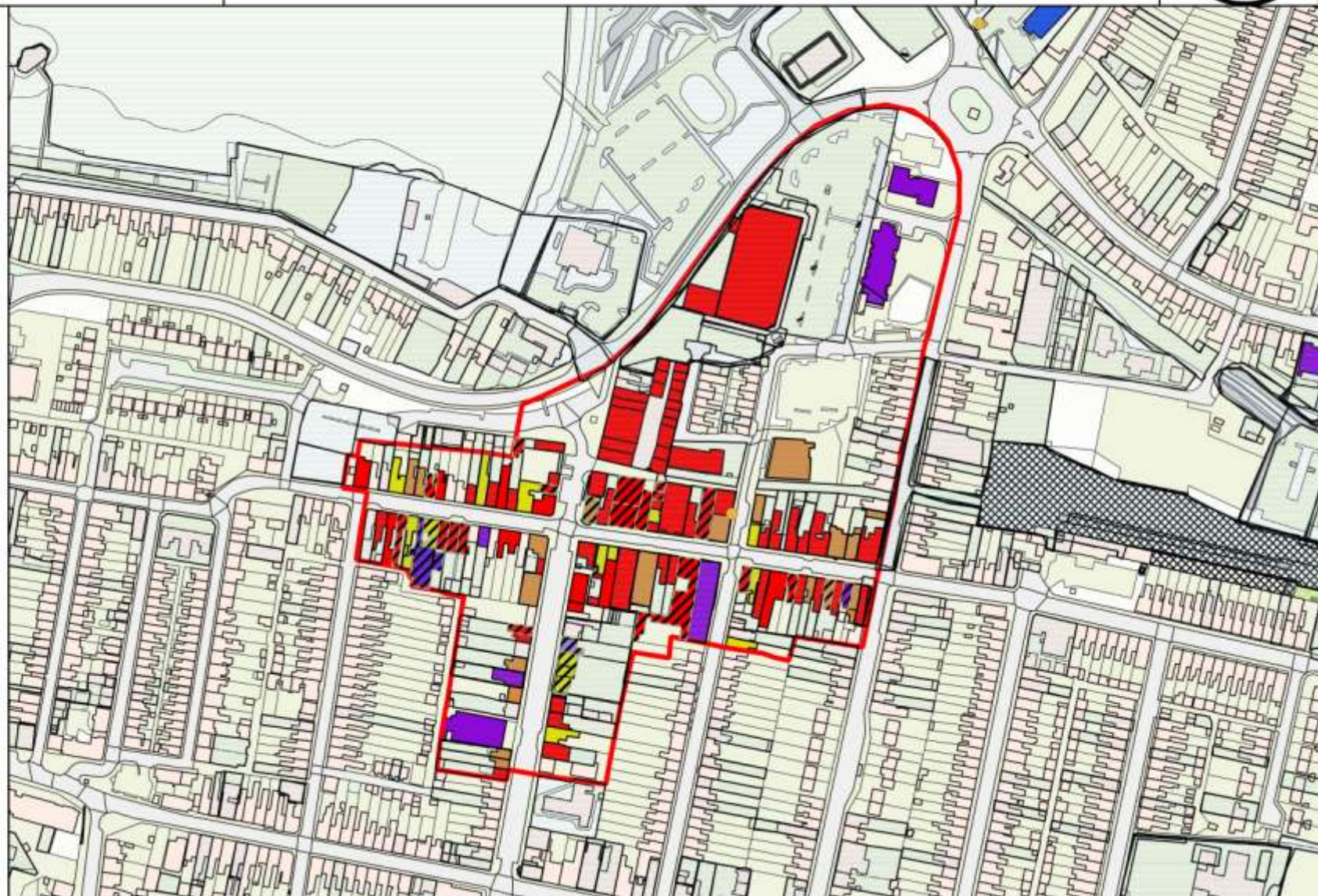


## Legend

Vacant Properties

True  
2016RetailSurvey

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







# Pembroke - Retail Survey 2016

Map produced on: 09 May 2016

Scale (A4 Print)

1:5.841

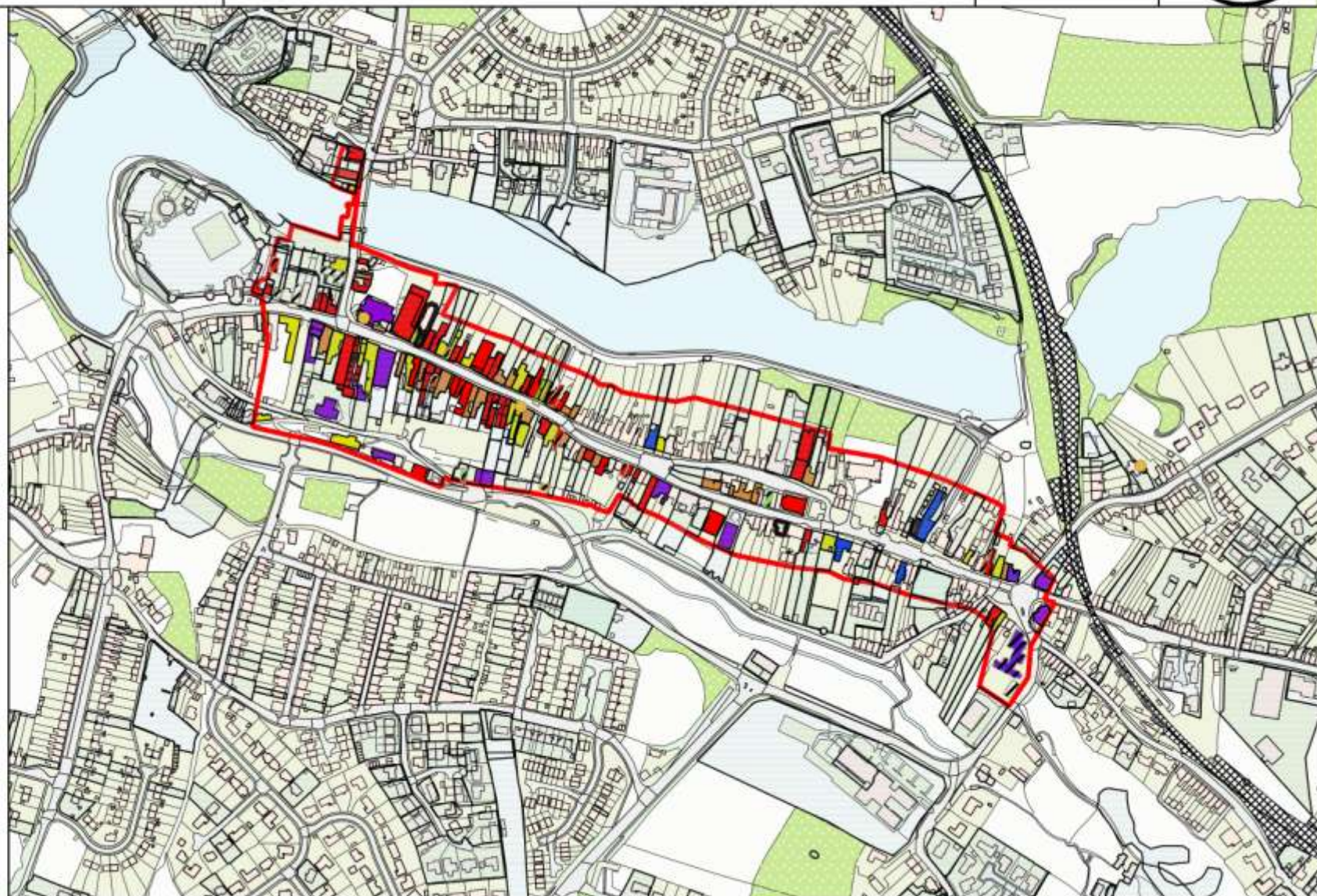


## Legend

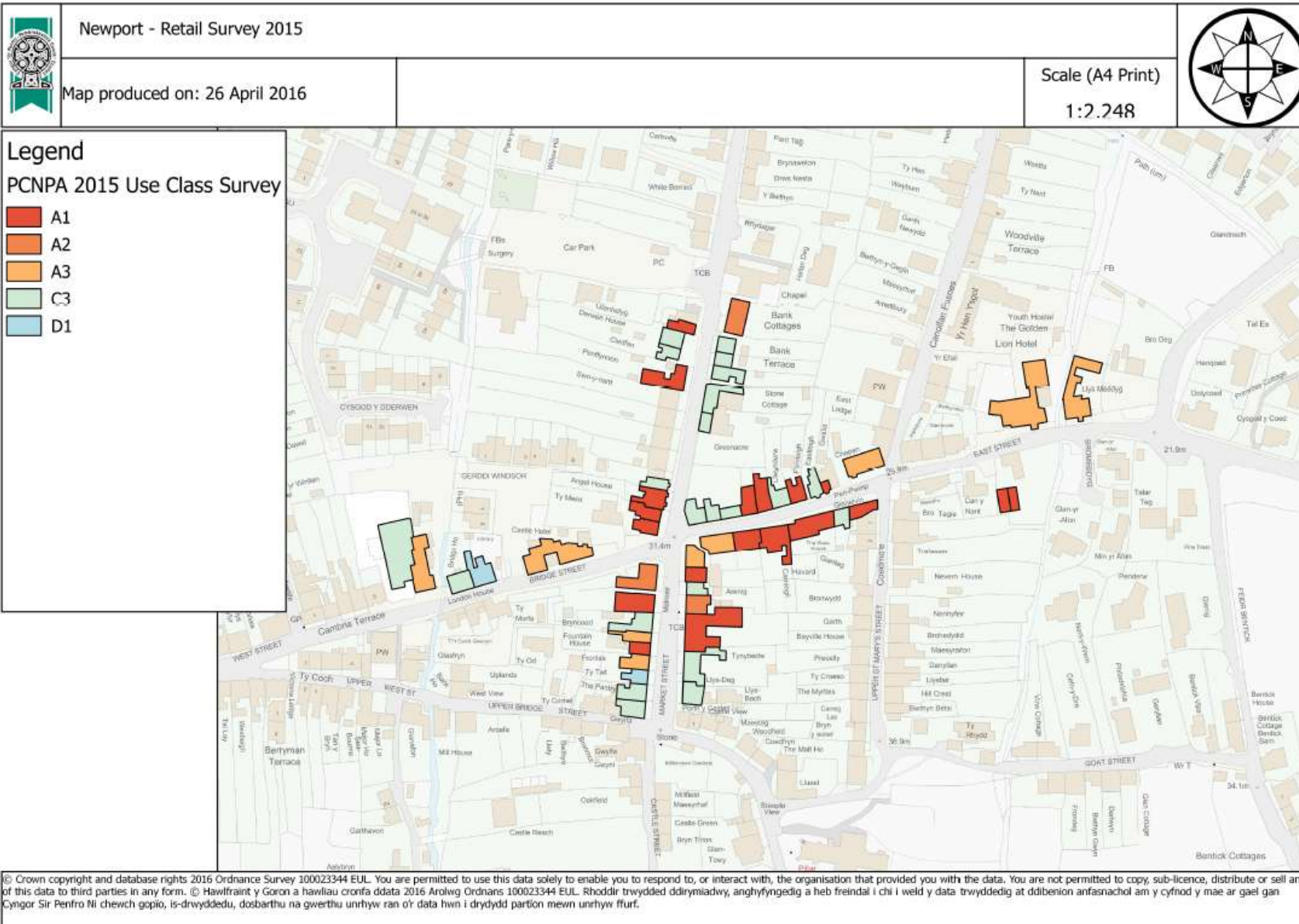
### Vacant Properties

True  
2016RetailSurvey

- A1
- A1/A3
- A2
- A3
- A3/C1
- B1
- C1
- D1
- D2
- Sui Gen
- Unknown
- VACANT







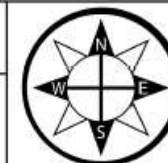


# Saundersfoot - Retail Survey 2015

Map produced on: 26 April 2016

Scale (A4 Print)

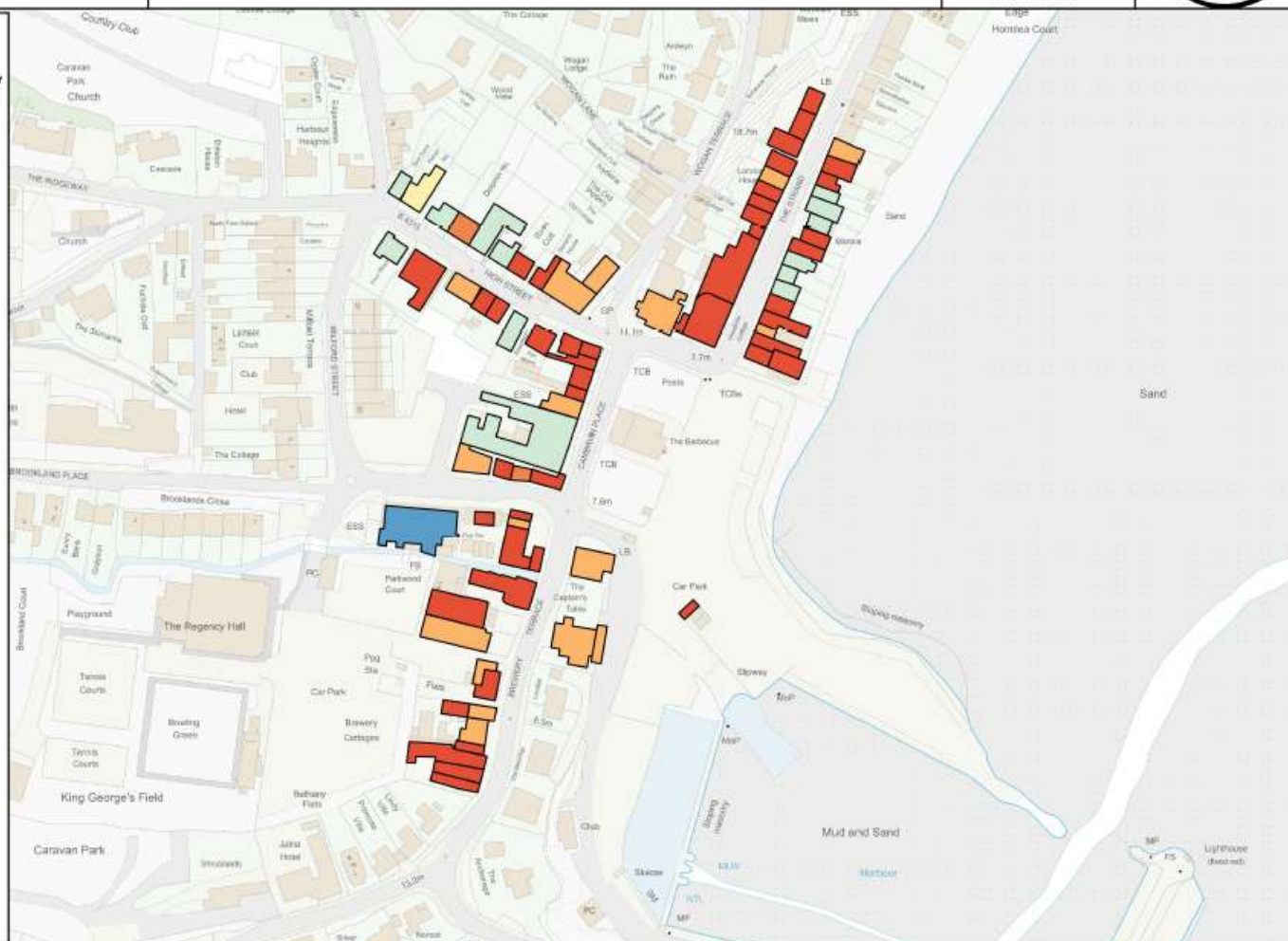
1:2.561



## Legend

### PCNPA 2015 Use Class Survey

- A1
- A2
- A3
- C1
- C3
- SG



© Crown copyright and database rights 2016 Ordnance Survey 100023344 EUL. You are permitted to use this data solely to enable you to respond to, or interact with, the organisation that provided you with the data. You are not permitted to copy, sub-licence, distribute or sell any of this data to third parties in any form. © Hawlfraint y Goron a hawliau cronfa ddata 2016 Arolwg Ordnans 100023344 EUL. Rhoddir trwydded ddiriymadwy, anghyfyngedig a heb freindal i chi i weld y data trwyddedig at ddibenion anfasnachol am y cyfnod y mae ar gael gan Cyngor Sir Penfro Ni chewch gopïo, is-drwyddedu, dosbarthu na gwerthu unrhyw ran o'r data hwn i drydydd partion mewn unrhyw ffurf.



Solva - Retail Survey 2015

Map produced on: 26 April 2016

Scale (A4 Print)

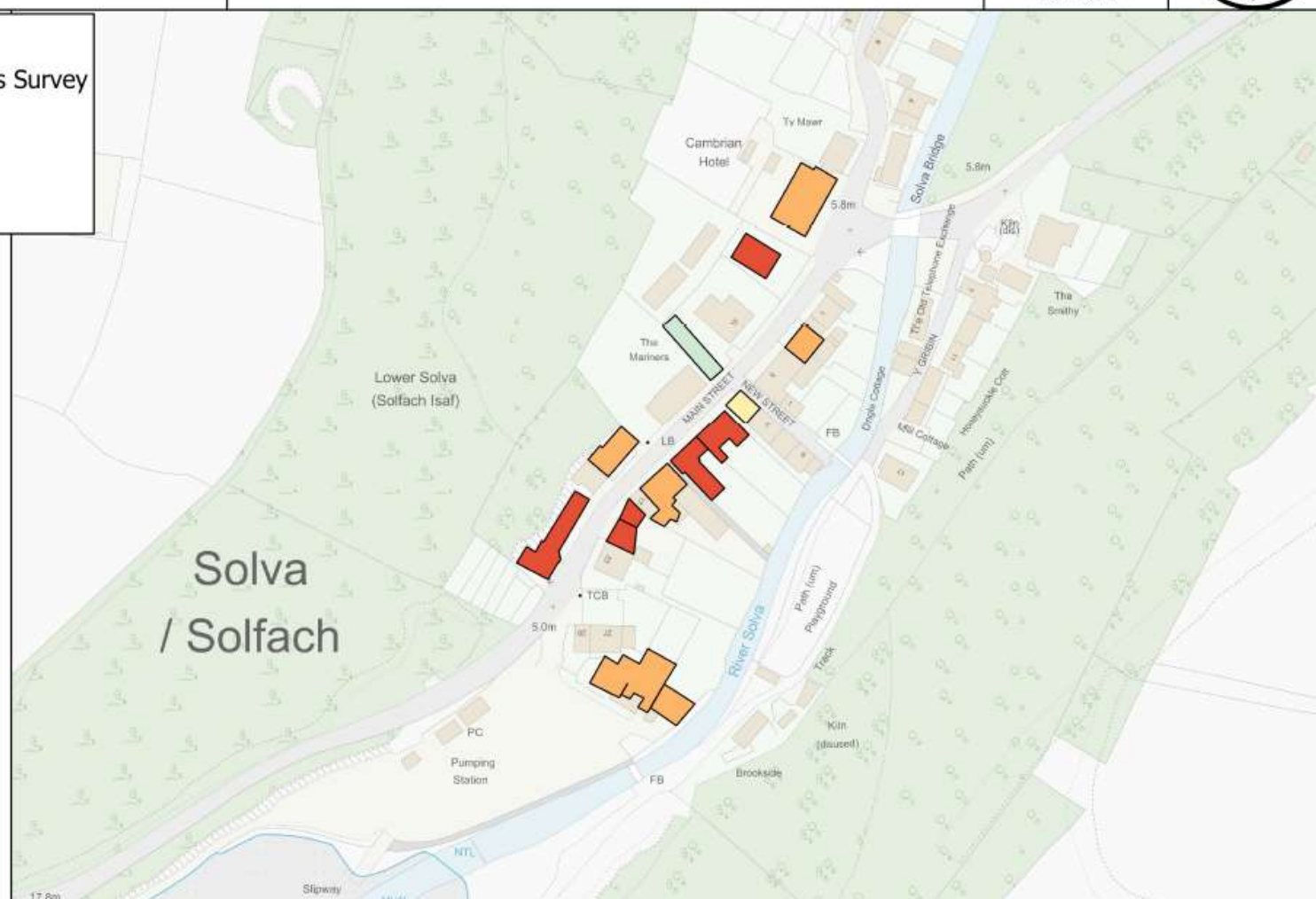
1:1.920



## Legend

PCNPA 2015 Use Class Survey

- A1
- A3
- C1
- C3



© Crown copyright and database rights 2016 Ordnance Survey 100023344 EUL. You are permitted to use this data solely to enable you to respond to, or interact with, the organisation that provided you with the data. You are not permitted to copy, sub-licence, distribute or sell any of this data to third parties in any form. © Hawlfraint y Goron a hawliau cronfa ddata 2016 Arolwg Ordians 100023344 EUL. Rhoddir trwydded ddirymiadwy, anghyfyngedig a heb freindal i chi i weld y data trwyddedig at ddibenion anfasnachol am y cyfnod y mae ar gael gan Cymgor Sir Penfro Ni chewch gopio, is-drwyddedu, dosbarthu na gwerthu unrhyw ran o'r data hwn i drydydd partion mewn unrhyw ffurf.





# St Davids - Retail Survey 2015

Map produced on: 26 April 2016

Scale (A4 Print)

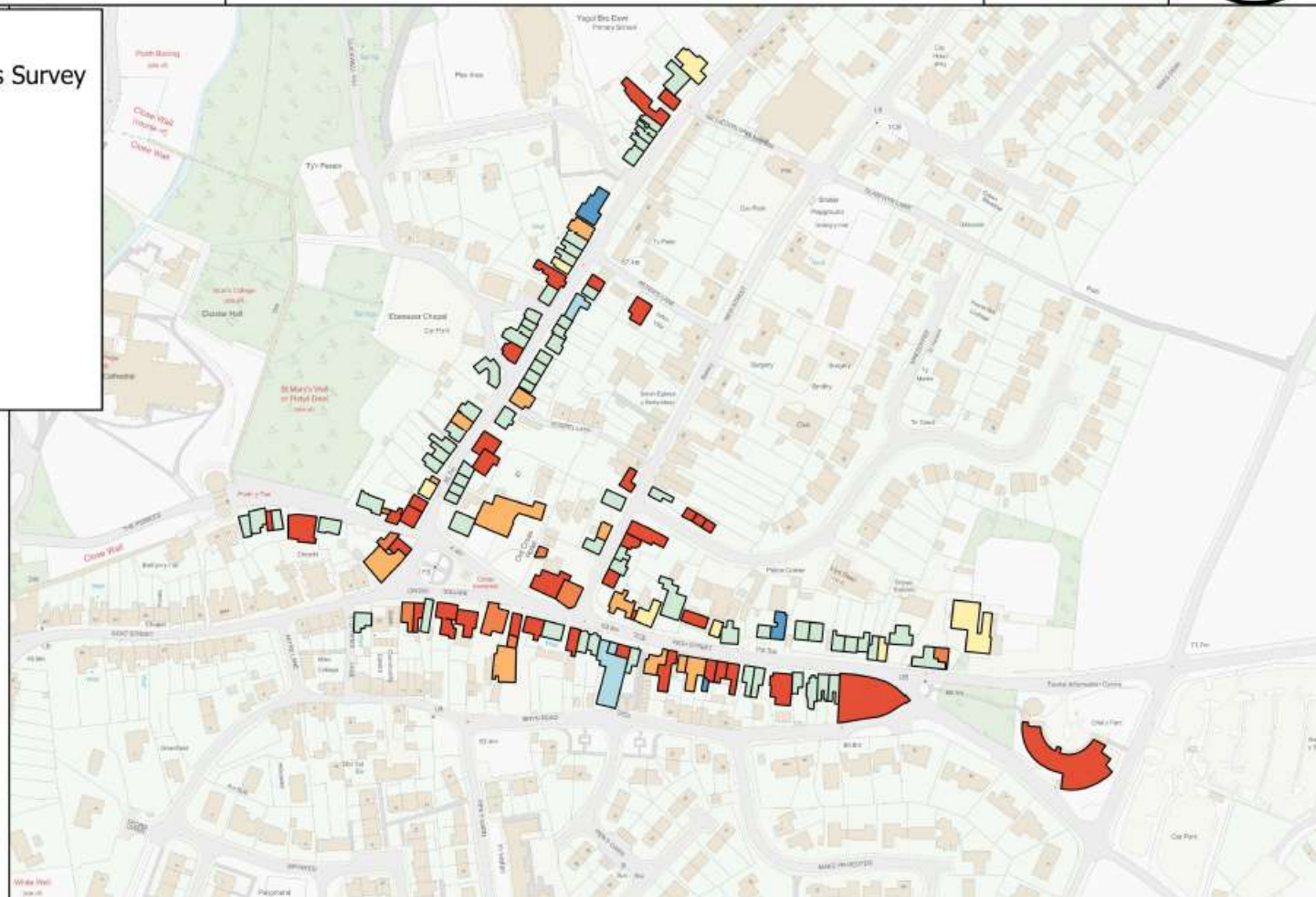
1:3,332



## Legend

### PCNPA 2015 Use Class Survey

- A1
- A2
- A3
- C1
- C3
- D1
- SG



© Crown copyright and database rights 2016 Ordnance Survey 100023344 EUL. You are permitted to use this data solely to enable you to respond to, or interact with, the organisation that provided you with the data. You are not permitted to copy, sub-licence, distribute or sell any of this data to third parties in any form. © Hawlfraint y Goron a hawliau cronfa ddata 2016 Arolwg Ordans 100023344 EUL. Rhoddir trwydded ddirymiadwy, anghyfyngedig a heb freindal i chi i weld y data trwyddedig at ddibenion anfasnachol am y cyfnod y mae ar gael gan Cyngor Sir Penfro. Ni chewch gopio, is-drwyddedu, dosbarthu na gwerthu unrhyw ran o'r data hwn i drydydd partion mewn unrhyw ffurf.

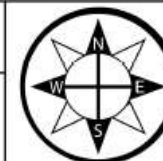


# Tenby - Retail Survey 2015

Map produced on: 26 April 2016

Scale (A4 Print)

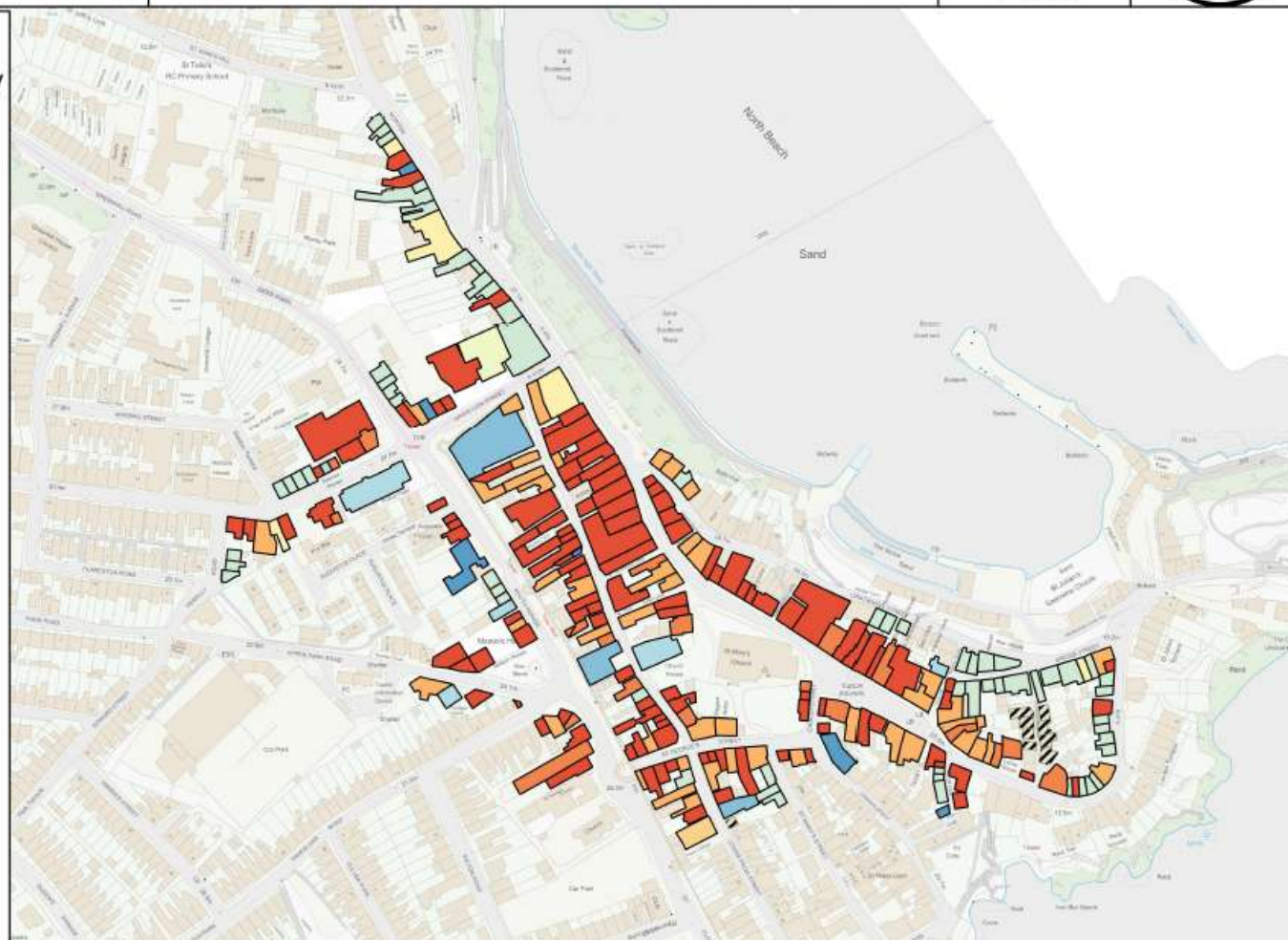
1:3.566



## Legend

### PCNPA 2015 Use Class Survey

- A1
- A2
- A3
- B2
- C1
- C2
- C3
- D1
- D2
- SG
- Vacant



© Crown copyright and database rights 2016 Ordnance Survey 100023344 EUL. You are permitted to use this data solely to enable you to respond to, or interact with, the organisation that provided you with the data. You are not permitted to copy, sub-licence, distribute or sell any of this data to third parties in any form. © Hawlfraint y Goron a hawliau cronfa ddata 2016 Arolwg Ordians 100023344 EUL. Rhoddir trwydded ddrymiadwy, anghyfngedig a heb freindal i chi i weld y data trwyddedig at ddibenion anfasnachol am y cyfnod y mae ar gael gan Cyngor Sir Penfro Ni cheirh gopio, is-drwyddedu, dosbarthu na gwerthu unrhyw ran o'r data hwn i drydydd partion mewn unrhyw ffurf.