



# Nathaniel Lichfield and Partners

Planning Design Economics

## **MAIN REPORT**

### **PEMBROKESHIRE – THE HAVEN SPATIAL PLAN AREA COMPLEMENTARITY STUDY**

Welsh Assembly Government in  
association with Pembrokeshire  
County Council, Pembrokeshire  
Coastal National Park Authority and

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1.0

## Introduction

1.1

Nathaniel Lichfield and Partners has been commissioned by the Welsh Assembly Government in conjunction with Carmarthenshire County Council, Pembrokeshire County Council and Pembrokeshire Coastal National Park Authority to prepare a complementarity study of the Pembrokeshire – The Haven Spatial Plan Area.

1.2

The purpose of the study is to consider the existing role and function of, and the relationship between, the hubs and settlements within the Spatial Plan Area and to advise on the ways in which these might be enhanced. In so doing, it will provide recommendations that will facilitate greater levels of sustainability, an improvement in the viability and economic wellbeing of the area, better levels of service provision and delivery and the establishment of a greater quality of life for those that live and work in and those that visit the area. It will also provide a policy basis for the delivery of the Wales Spatial Plan's vision and aspirations for the area and will form part of the evidence base for the emerging Local Development Plans (LDPs) for Carmarthenshire County Council, Pembrokeshire County Council and Pembrokeshire Coast National Park Authority.

1.3

By way of background, it is useful to understand the current position of each Authority in respect of the preparation of its LDP:

- a The draft Carmarthenshire LDP is presently under preparation and is expected to be published for consultation late in 2009 or early 2010.
- b Consultation on the Pembrokeshire Preferred Strategy ended in May 2009. The draft LDP is presently under preparation and is expected to be published for consultation in Spring 2010.
- c Consultation on the Pembrokeshire Coast National Park Deposit LDP was completed in April 2009, Consultation on alternative sites was completed in July 2009.

### Context

1.4

The overarching objectives of the Wales Spatial Plan are defined as including:

- a Promoting a sustainable economy;
- b Building sustainable communities;
- c Valuing the environment;
- d Achieving sustainable accessibility; and,
- e Respecting distinctiveness.

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- 1.5 These challenges are common to all parts of Wales but are to be addressed on a local level in each of the six Spatial Plan Areas. The vision for the Pembrokeshire – The Haven Spatial Plan Area, which has been established in response to these considerations, is for:
- “A network of strong communities supported by a robust, sustainable, diverse high value-added economy underpinned by the Area’s unique environment, maritime access and internationally important energy and tourism opportunities.”*
- 1.6 This vision sets a clear basis for action and is supported by a number of strategic priorities. Building upon an understanding of the local context, this study will consider the ways in which the economic, social and environmental aspirations for the area might be delivered through the specific enhancement of individual settlements and the relationships between them.
- 1.7 Although we consider specific aspects of the Spatial Plan Area (relating to population, housing, employment, tourism, retail, leisure and public services) in detail in the separate evidence report, an appreciation of the broad nature of Pembrokeshire – The Haven Spatial Plan Area represents an essential starting point for the understanding of existing complementarity and the identification of recommendations relating to the improvement of complementarity between settlements.
- 1.8 The Pembrokeshire – The Haven Spatial Plan Area occupies a peripheral location in the far west of Wales. It enjoys a very high quality coastline and countryside which is punctuated by a number of distinct yet interdependent market towns and villages. A large proportion of the Spatial Plan Area’s population is concentrated around the Milford Haven waterway although is second only to the Central Wales Spatial Plan Area in respect of its low population density. None of the towns within the Spatial Plan Area have a population of more than 20,000 people and very large parts of the area are sparsely populated.
- 1.9 The quality of the environment throughout the Spatial Plan Area and the strong sense of community are attractive and appealing to residents and visitors alike and are important in contributing towards the strong sense of place that exists. Going forwards, it will be important to ensure that these qualities can be maintained in the face of increasing pressure for development.
- 1.10 As a consequence of its location, rurality and very low population density, the main settlements are expected to perform a role and function in respect of the provision of employment and service functions that would normally be associated with larger centres. In this context, the key challenge is to ensure that the full range of services and facilities that are required by the local communities can be adequately and appropriately delivered.
- 1.11 Against this background, it is important to achieve a clear understanding of the ways in which the settlements relate to one another and the extent to which

their varied roles contribute towards meeting the needs of those living and working in and visiting the local area. This report is intended to provide a basis by which action might be taken to enhance the efficiency of the settlements, both individually and collectively, and to improve their contribution to the sustainability and viability of the wider area.

1.12

The Wales Spatial Plan 2008 Update has established a settlement hierarchy for the Pembrokeshire – The Haven area and this will form the basis for the analysis and recommendations that are contained within this report. As detailed below, this includes six Primary Key Settlements, six Key Settlements and nine Local Centres as well as three Settlement Hubs:

Tier	Towns within Tier
Tier 1: Primary Key Settlements	Carmarthen Haverfordwest Milford Haven and Neyland (linked settlements) Pembroke and Pembroke Dock (linked settlements)
Tier 2: Key Settlements	Fishguard and Goodwick (linked settlements) Narberth St Clears Tenby Whitland
Tier 3: Local Centres	Crymych Kilgetty Laugharne Letterston Newcastle Emlyn Newport Pendine Saundersfoot St Davids

Table 1 Pembrokeshire - The Haven Settlement Hierarchy

Hub	Settlements within Hub
Carmarthen	Carmarthen
Fishguard	Fishguard

	Goodwick
Haven Towns	Haverfordwest Neyland Milford Haven Pembroke Dock Pembroke

Table 2 Pembrokeshire - The Haven Settlement Hubs

1.13

The distribution of these centres is illustrated below:

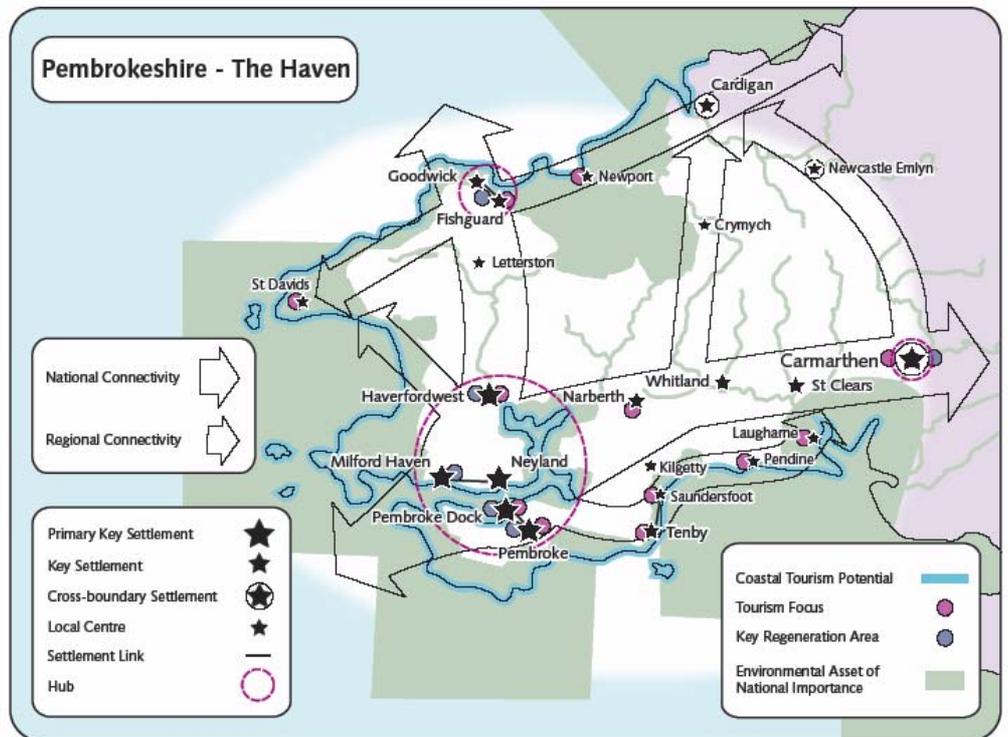


Fig 1 Pembrokeshire - The Haven Spatial Plan Area

1.14

These settlements exist within the context of the wider Spatial Plan Area which is characterised by a very high quality countryside and coastal environment, strong local communities and a high quality of life. These are important benefits which should be protected and enhanced for their own sake and purposes. However, they area also factors that might serve to constrain the potential for further development and growth in the future. In seeking to deliver the vision for the Spatial Plan Area, it will be important to ensure that complementarity is achieved between the development of a diverse and robust

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economy, the adequate provision of appropriate services and facilities and the maintenance of the character, quality and attractiveness of the area.

- 1.15 These factors must be set against a number of further challenges that exist such as the relatively high levels of deprivation that characterise certain parts of the Spatial Plan Area – both within individual settlements and in the surrounding countryside, the relatively narrow economic base and associated low wage levels for many workers, and the changing demographic profile of the local area. These matters will all have a bearing upon the nature of the local needs that exist and the ways in which these can best be met. As such, they will impact upon the role of the different settlements and the ways in which they might relate to one another.

### **Complementarity**

- 1.16 Settlements do not exist in isolation. Rather they exist within the context of a defined network and hierarchy of other centres. In many cases, the settlements may perform different roles and functions and their distinctiveness can be important in contributing towards – and sustaining – a sense of place within the local area.

- 1.17 Complementarity relates to the way in which these settlements might relate to one another and the extent to which they can individually and collectively contribute towards the achievement of the established vision for the area. This can be in respect of the relative location and function of the different settlements:

- a **Locational complementarity:** This refers to the way in which settlements (usually of the same hierarchical tier) can serve a very similar role in different areas (e.g. as a major employment, retail or residential area). The relationships between such settlements might not be mutually beneficial in terms of the way that success in one settlement will necessarily assist the other centre. However, their relationships need not be disadvantageous as there might be scope to sustain a number of strong centres serving similar roles within the Spatial Plan Area. Whilst an element of competition between settlements can be positive in encouraging necessary improvements, this type of relationship would militate against any adverse and disadvantageous forms of competition.
- b **Functional complementarity:** This refers to the relationship between settlements that might be located relatively close to one another. It relates to the way in which settlements might perform different roles (i.e. one as a retail centre and one as a tourism centre) or a different scale of function (i.e. one as a major retail area and one as a niche centre or local shopping area). Such relationships can encourage the various centres to achieve their full potential in terms of the type and scale of functions and can thereby be beneficial for all of the settlements within the Spatial Plan Area. For example, this approach can provide a basis for some centres to focus upon

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a particular key role (or roles) rather than seeking to serve all functions for which there might not be sufficient critical mass. As such, it can help to ensure a balanced distribution of services and facilities across the Spatial Plan area.

- 1.18 The relationships between the different settlements are likely to be complex. An individual settlement might have both locational and functional connections with other centre. If these relationships are to be maximised and are to be mutually beneficial, it is important that each centre should support a strong community and contribute to a robust and sustainable local economy in a manner that is proportionate to its scale and function. This, together with the existence of good quality connections, can provide a firm basis for complementarity and will provide a clear foundation for enhancement strategies which build upon existing strengths and contribute towards the delivery of the vision for the wider area.
- 1.19 On this basis, complementarity can be viewed as a function of sustainability and as providing a basis for sustainability in its four dimensions. The establishment of complementary relationships between different settlements will enable them to work together in order to move forwards towards a more sustainable future, an ambition that lies at the heart of much of the Welsh Assembly Government's work.
- 1.20 A recognition of the role of the settlements within the Pembrokeshire – The Haven Spatial Plan Area is therefore central to an understanding of the extent to which they are complementary. In particular, a consideration of their existing function – and the extent to which their potential is being achieved – provides a basis by which the relationship of centres might be understood and the extent to which complementarity (or competition) exists can be gauged. This can then inform the need for and the nature of enhancement strategies.
- 1.21 The reality may be that the existing roles of settlements might be less easy to define and the basis for improvement might not be so obvious. However, the following considerations will help to inform our analysis of the current context and our understanding of the potential complementarity:
- a The main strengths and weaknesses of the settlement;
  - b The identified opportunities for development – what has worked and what has not worked in the past;
  - c The barriers to improvement;
  - d The extent to which the settlement enjoys a clear sense of place;
  - e The scale of the settlement and their position within the settlement hierarchy;

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- f The physical and functional relationships of the settlement to surrounding centres;
- g The accessibility of the settlement and the ease of access to other settlements in the Spatial Plan Area; and,
- h The capacity of the settlement to contribute towards the vision of the Pembrokeshire – The Haven Spatial Plan Area.
- 1.22 In short, the objective must be for a series of distinctive, yet inter-connected settlements, each of which support strong communities and contribute towards a robust and sustainable economy. In seeking to achieve these aims, particular consideration must also be given to the need to protect, preserve and enhance the very high quality environmental setting of the Spatial Plan Area.
- 1.23 The achievement of complementarity within the Pembrokeshire – The Haven Spatial Plan Area will depend both upon the promotion of strong relationships between the various settlements (at each level and in all locations) and also between different types of activity. For example, retail and leisure functions are potentially complementary, as are tourism and community facilities. However, the potential for conflict might exist within these relationships – for example, between tourism and heavier forms of industry such as the energy production facilities that are located along the Milford Haven Waterway. In seeking to deliver the vision for the Spatial Plan Area, consideration must therefore be given to the ways in which any potential conflicts might be minimised and options for the enhancement of positive functional relationships within and between settlements might be identified.
- 1.24 In considering these important issues, this study will facilitate the delivery of the Wales Spatial Plan and will inform the detailed strategy that is to be included within the emerging Local Development Plans that are currently being prepared by each of the three local planning authorities. It will provide the basis by which potentially difficult policy choices might be made and intervention strategies might be established and, in so doing, will provide an important building block in the achievement of a more sustainable, equitable and vibrant Pembrokeshire – The Haven Spatial Plan Area.

## **Structure**

- 1.25 This report is principally intended to consider the role of the main centres within the Spatial Plan Area whilst also considering the role of smaller centres in supporting and contributing towards complementarity. It recognises the complementarity that exists between different tiers and within individual tiers – including low order tiers for which there is scope for groups of settlements to work with one another as hubs in order to provide services and functions to the local community in a collective manner.
- 1.26 This report is structured as follows:

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- a The Vision for Complementarity (Chapter 2);
  - b The Future Shape of Complementarity (Chapter 3);
  - c The Future Role of the Main Settlements (Chapter 4);
  - d Achieving the Future Role (Chapter 5);
  - e Complementarity with adjoining Spatial Plan Areas (Chapter 6); and,
  - f Conclusions (Chapter 7).

1.27

It builds upon the separate evidence report which considers the current situation within the Spatial Plan Area in respect of the role and function of and the relationship between settlements relating to:

- a Population and housing;
- b Employment and the economy;
- c Tourism;
- d Leisure;
- e Retail; and,
- f Public Services.

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## The Vision for Complementarity

### The Need for Vision

As demonstrated in the introduction, the purpose of the study is to provide a framework for future action and enhancement within individual settlements so that they might individually and collectively contribute towards the achievement of the vision for the Spatial Plan Area as defined by the Wales Spatial Plan. Central to this must be an understanding of how the Spatial Plan Area might look in the future, in terms of:

- a How the needs of the population might be best achieved;
- b What the main role of the key settlements will be;
- c How they will relate to one another; and,
- d How these aspirations can be achieved in a manner that reflects the quality of the local environment – both for its own sake and as a facilitator of the well-being of the local population and visitors to the area.

An understanding of the future role of and relationships between the settlements will provide a platform by which the policy and delivery mechanisms that are necessary to achieve the changes that are being sought might be identified and implemented. In considering how the Spatial Plan Area might look and function in the future, it is important to recognise that a specific end point whereby all of the settlements are serving their full potential and have reached an optimum level of complementarity is unlikely to be achieved. This is because the process of enhancing the character and role of the settlements and the relationships between them represents an ongoing process which will necessitate continued action in response to changing circumstances within and outside of the Spatial Plan Area. However, the overall direction of travel should be forwards with progress being made in terms of enhancing the strength and sustainability of local communities, increasing the robustness and diversity of the economy, addressing identified weaknesses and challenges, and protecting and improving the local environment.

Substantial improvements have been achieved in many parts of the Spatial Plan Area and these are expected to be supplemented by current and future activities. However, the achievement of the complementarity that is sought by the Wales Spatial Plan will depend upon ensuring that these actions and strategies are co-ordinated so that they can contribute towards the enhancement of the Spatial Plan Area as a whole.

The vision for future complementarity will provide a consistent basis for change in each of the settlements and hubs so that their potential to serve the Spatial Plan Area might be fully realised and the local opportunities for improvement

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might be maximised. In addition, it will also provide a basis by which progress can be monitored and the success (or otherwise) of individual strategies might be appraised. Over time, it will be necessary to review the vision in order to ensure that it is still deliverable, realistic and appropriate in the context of the current and anticipated future circumstances that exist at the time.

2.5 This report forms a key initial step in the on-going process of change. It seeks to identify a vision for complementarity and to define the form that this might take. It also highlights a number of important policy issues that will need to be taken into account by the Welsh Assembly Government and the three local authorities as they collectively seek to enhance the quality, sustainability and vitality of local communities, the local economy and the local environment within the Pembrokeshire – The Haven Spatial Plan Area.

2.6 This process of enhancement builds upon the continual development of settlements within the Spatial Plan Area and follows on from a wide range of previous and current strategies and initiatives. It is recognised that the key to maximising the future wellbeing of the area is to build upon the qualities and opportunities that already exist in the area and to seek to address the weaknesses and challenges that have been identified. The policy choices that are identified must therefore be rooted in a clear understanding of the existing context within the local area and upon the appropriate identification of issues and the targeting of intervention. The accompanying evidence report provides a clear understanding of the existing context in the Spatial Plan Area and highlights existing issues and challenges. In so doing, it provides the framework for this report which considers the future role of and relationship between the settlements and provides a basis by which the on-going process of change might be encouraged.

## **The Vision**

2.7 Building on from our understanding of the existing context, it is possible to establish a vision for greater complementarity which will contribute towards the achievement of the ambitions of the Wales Spatial Plan for the Pembrokeshire – The Haven Spatial Plan Area.

2.8 The key vision for the long term future of the Spatial Plan Area must be for the achievement and enhancement of strong communities in all areas and for the provision of an appropriate type and level of housing; employment opportunities; retail, leisure and tourism facilities; and public services in a way that meets the needs of the community. These elements are closely linked in that an appropriate provision of necessary facilities and services both represents an essential basis for the maintenance of strong communities and are dependant upon the strength of the local area to provide the necessary level of critical mass that would support them in the long term. In addition, the vision should also be for the promotion of a high quality, attractive and ever-improving environment and a continued enhancement in the sense of

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community that exists. Together, these components will contribute towards an increased sense of well-being within the Spatial Plan Area.

- 2.9 The aspirations for strong communities and for the provision of facilities and services to meet local needs lie at the heart of the Wales Spatial Plan and will be crucial to the future strength of the area. If the vision for complementarity is to have any beneficial impact within the Spatial Plan Area, it must be deliverable. The vision for strong communities and for each settlement to fulfil its potential can be translated into action through an understanding of the current and potential future roles of the settlements, recognising the varying capacity of the settlements within the Spatial Plan Area and the different roles and functions that they might reasonably be expected to perform. To this end, the vision for complementarity will depend upon enabling each settlement to achieve its full potential in terms of the strength of the local economy, the provision of services and the accommodation of future growth.
- 2.10 If fully achieved, the vision for complementarity would see facilities and opportunities being directed into those areas in which they would be most able to serve the needs of the users within the Spatial Plan Area. The starting point of this pattern of distribution is the settlement hierarchy set out within the Wales Spatial Plan and a clear understanding of the current roles and functions of the different settlements within the Spatial Plan Area. This joint focus is important as it would enable actions to be targeted into locations where they have the greatest prospect of being successful. It also reflects the reality that different settlements perform a variety of roles and that some Key Settlements or Local Centres perform a more important role than some of the Primary Key Settlements in respect of particular functions. Whilst this might highlight a particular need for action in respect of the ability of certain centres to adequately perform the role of Primary Key Settlements, it also illustrates the importance of smaller centres (in particular Tenby, Saundersfoot, St Davids and Narberth) in serving the Spatial Plan Area – a role that should be encouraged to develop further as appropriate.
- 2.11 This approach of locational and functional complementarity can result in a position whereby there is an absence of adverse competition between centres and the achievement of mutual benefits for different settlements.
- 2.12 The implications of this vision are considered in detail in Chapters 3 and 4 which consider how different functions would be provided within the Spatial Plan Area and the future role of the main settlements. However, in summary, it will be achieved by:
- a Ensuring an adequate supply and range of well-designed, quality housing that is capable of meeting the different requirements of all sectors of the community in a socially inclusive and balanced manner. This will include the provision of affordable and market housing that is within the reach of all sectors of the community;

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- b Providing high quality local retail and leisure facilities together with easy access to a network of larger centres that can provide a wider range of facilities and opportunities;
  - c Establishing a sustainable and diverse economic base wherein an appropriate supply of jobs are available and can contribute towards the economic viability of the Spatial Plan Area as a whole;
  - d Maximising the tourism opportunities that exist throughout the Spatial Plan Area;
  - e Ensuring that public services are appropriately distributed within those areas where they can best serve the needs of the local population;
  - f Reducing the need to travel, particularly for lower order functions, thereby helping to achieve a more sustainable pattern of use of natural resources; and,
  - g Ensuring a balance between the provision and distribution of facilities and services and the protection and enhancement of the natural environment and contribute towards the aspirations relating to the achievement of a low carbon economy.

2.13 The establishment of the vision for complementarity upon a clear understanding of the existing strengths and opportunities of different settlements within the Spatial Plan Area provides the most reliable basis for future action and success. It can draw upon – but should not be constrained by – the existing context within the Spatial Plan Area and can seek to enhance current strengths and remedy identified weaknesses. Crucially, this strategy recognises that all settlements have an important role to play in contributing towards the long term well-being of the Spatial Plan Area. Although some of the Primary Key Settlements will perform a more substantial role as population centres and foci for employment, retail or leisure activities, their role must be supported by smaller centres which are vital in meeting the day to day needs of the local communities. An understanding of the importance of and the need for local centres in supporting the larger towns represents an essential element of complementarity and consideration should be given to the key priorities for action and improvement within villages and local centres throughout the Spatial Plan Area.

2.14 In addition to the appropriate distribution of facilities and services, this complementary relationship will depend upon ensuring that a high quality infrastructure network can provide easy access between all of the settlements. Whilst the provision of high quality communications infrastructure can represent a considerable challenge in rural area, it is nevertheless essential to ensure that good levels of access between the different settlements can be achieved if the full benefits of complementarity are to be realised.

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- 2.15 The implication of this strategy for complementarity will therefore be the establishment of strong centres that are supported by an appropriate level of critical mass to create a high level of attractiveness and attraction to investors. This strength will, in turn, provide a basis for spin-off benefits for the other parts of the Spatial Plan Area as a result of the enhanced level, quality and viability of facilities and services and the improved image and profile of Pembrokeshire – The Haven. This would also have important benefits in respect of the achievement of increased levels of economic, environmental and social sustainability. As such, rather than concentrating the benefits of well-being within a small number of larger centres, it would contribute towards the maintenance of strong communities in all parts of the Spatial Plan Area, in accordance with the vision for the area that is established in the Wales Spatial Plan. In addition, this approach takes account of the very high level of environmental quality of the Spatial Plan Area and the considerable opportunities that are afforded by its unique environmental assets. In response, it will help to achieve complementarity between the protection and enhancement of the environment and the promotion of communities and the local economy.
- 2.16 This approach will therefore contribute towards locational and functional complementarity between the different settlements and between the different sectors. We consider its implications and the way in which it could be achieved in more detail in the next chapters.

### **Alternative Strategy Options**

- 2.17 Our recommended vision of complementarity is considered to have the greatest potential to meet the objectives set out within the Wales Spatial Plan and thereby to make the greatest possible contribution towards the strength and well-being of individual settlements and communities and the Spatial Plan Area as a whole.
- 2.18 In reaching this recommended strategy, we have identified and appraised two alternative options. Neither of these broad alternative options – a dispersal of facilities throughout the Spatial Plan Area and a concentration of all facilities into a single core centre – are considered to have the capacity to provide for the establishment and maintenance of complementary relationships between the settlements or to contribute towards the network of strong communities that is sought by the Wales Spatial Plan.

### **Dispersal throughout the Spatial Plan Area**

- 2.19 It would be neither feasible nor appropriate to adopt a dispersal strategy which seeks to provide all facilities and opportunities in all locations. Such an approach would raise significant deliverability issues in respect of:
- a An expected inability to achieve an adequate level of critical mass that would be needed to provide or sustain the services and functions that are required;

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- b The likely inability and unwillingness of the market to provide for this level and dispersal of facilities; and,
  - c The scale of the utilities, infrastructure and other services that would be required to facilitate a high level of growth in each of the settlements throughout the Spatial Plan Area.

2.20 Even in the event that a dispersal of services could be achieved in the first instance, it would result in an over-provision which could not be sustained over the longer term. The implication of this would be an inability to adequately serve the needs of Spatial Plan Area and a very real risk to the strength and viability of all settlements and communities. It would therefore not contribute towards the vision of the Wales Spatial Plan for a network of strong communities. In addition, it would also threaten the potential for a sense of place to be established by building upon particular local qualities and distinctiveness whilst the level of development associated with this option would also have the potential to undermine the environmental quality and character of the Spatial Plan Area.

2.21 This dispersal approach would not be sustainable, would not contribute towards the achievement of the vision for the Spatial Plan Area and would not facilitate the development of complementary relationships between the settlements.

### **Concentration into a single centre or centres**

2.22 Whilst the vision for complementarity cannot equate to a dispersal of facilities into every local centre, it also does not mean that everything should be concentrated into a single settlement or a small number of settlements. This would promote such settlements at the expense of other centres. In addition to raising concerns regarding the ability of the main centres to support the level of growth that would be assumed by this approach, this would also raise fundamental concerns regarding the accessibility of services and facilities to all those living in the Spatial Plan Area and the resultant implications for serving the needs of those living and working in and visiting the Spatial Plan Area.

2.23 We consider that the concentration of all activities, services and functions into one or a small number of centres would be unsustainable and that it would result in the weakening of the strength of other centres as the significant opportunities that they offer would not be realised. This would result in a network of relationships that would not be complementary and it would not contribute toward the overall ambition for a network of strong communities.

### **Conclusion**

2.24 An understanding of the potential implications of these broad polar opposite examples of non-complementary relationships helps to solidify the basis of the vision for complementarity within the Spatial Plan Area in respect of a clearly defined network of centres which all have a defined and specific role. As explained above, these roles and functions will stem from an understanding of

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their current performance, the opportunities that they provide and the challenges that they face at this time.

2.25 The vision for complementarity can be summarised as follows:

*An integrated network of strong communities and settlements throughout the Spatial Plan Area, all of which fulfil their potential and are well related in physical and functional terms with facilities and services directed to those centres that are most able to serve the needs of the users within the Spatial Plan Area. All of these strengthened and complementary settlements will make a positive contribution towards the achievement of the vision for the area that is set out within the Wales Spatial Plan.*

2.26 The plan contained within the Wales Spatial Plan which illustrates the distribution of settlements across the Pembrokeshire – The Haven area provides a useful illustration of the basis for complementarity. Each of the settlements shown on this plan has an important role to play and a contribution to make to the wellbeing of the Spatial Plan Area and the achievement of its vision. The specific nature of these roles and locational and functional relationships will inevitably vary according to local circumstances and characteristics but future complementarity will rest upon the enhancement of each of these (and other) settlements and the development of strong relationships between them.

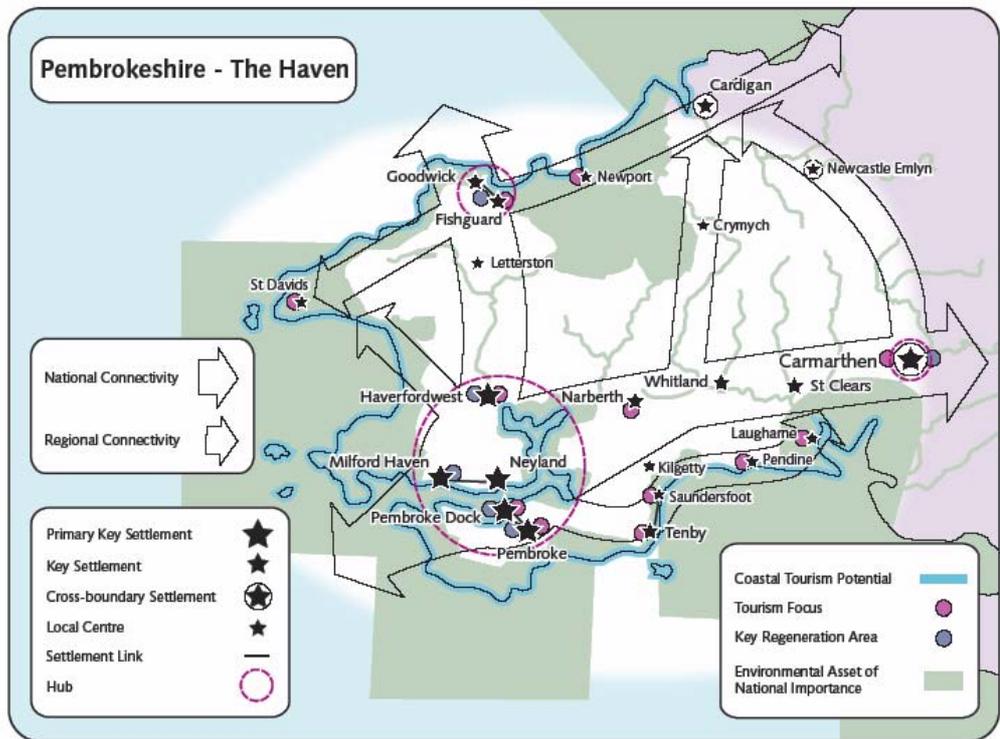


Fig 2 Distribution of settlements within the Spatial Plan Area: the basis for complementarity

- 2.27 The implementation of this vision for complementarity will mean that some settlements will act as regional service or employment centres which are important for the whole of the Spatial Plan Area whilst others will act as local service or retail centres which serve a very limited catchment area. In performing this role, such centres would complement the main settlements and hubs and would be able to support their local communities, thereby contributing towards the vision for the Spatial Plan Area.
- 2.28 The next chapters provide a clear explanation of the future shape of complementarity within the Spatial Plan Area, in respect of the way in which services and facilities could be provided and the role that each of the main settlements would perform. This report then considers the ways in which this future position might be achieved in practice.

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## 3.0 The Future Shape of Complementarity

3.1 The accompanying evidence report considers the various roles of different settlements and sets out the extent to which complementary relationships already exist within the Spatial Plan Area. As has been shown, the achievement of the vision for complementarity will depend upon building on from this basis: where complementary relationships already exist, they should be encouraged and promoted further and where complementarity is not evident at present, consideration should be given to the ways in which it might be achieved.

3.2 Throughout the Spatial Plan Area and in respect of all broad sectors, the main aims should be to:

- a Enhance the quality and sustainability of settlements;
- b Ensure that they can achieve their full potential;
- c Ensure that the various needs of those that live and work in and that visit the area are satisfied; and, ultimately to
- d Ensure that they can contribute towards the Wales Spatial Plan vision for the Pembrokeshire – The Haven area.

3.3 The purpose of this chapter is to describe the way in which employment, retail, leisure, tourism and public services would be delivered in a more complementary manner in the Spatial Plan Area in the future. This builds upon the analysis contained within the evidence report and is augmented by the next chapter which explains the key future roles of each of the main settlements within the Spatial Plan Area.

### **Population and Housing**

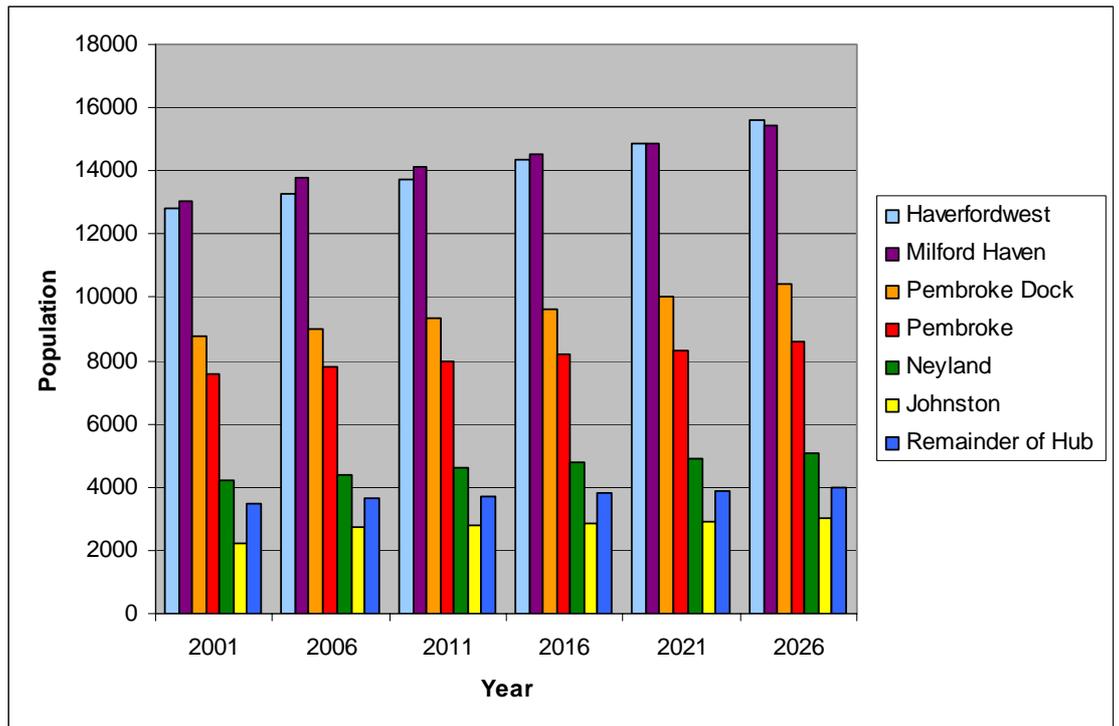
3.4 The role of settlements and the relationships that exist between them can be best understood in respect of the ways in which they are able to serve the needs of those that live in their catchment area. For some small villages, the catchment area might be very limited whilst for larger centres, it might cover a large part of the Spatial Plan Area. In all cases, however, people must be viewed as being at the heart of the settlement and the local community. To this end, an understanding of the distribution of the population – and hence, housing – throughout the Spatial Plan Area acts as a vital benchmark for complementarity. It will shape the requirement for different types of facilities and services and will provide a basis by which it is possible to ascertain whether the needs of the local population are adequately served where they live or whether they need to travel to access even the most basic of facilities.

3.5 The provision of an adequate supply of housing represents a vital basis by which the needs of the local population might be satisfied. It can help to

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sustain communities and can support social integration within a local area. In addition, it can also serve an important economic function as the delivery of housing can accommodate a local workforce which will thereby support economic activity. So long as the new housing is delivered in an environmentally sustainable manner, this balance between community and economic benefits can result in an enhancement in the well-being of existing and future residents.

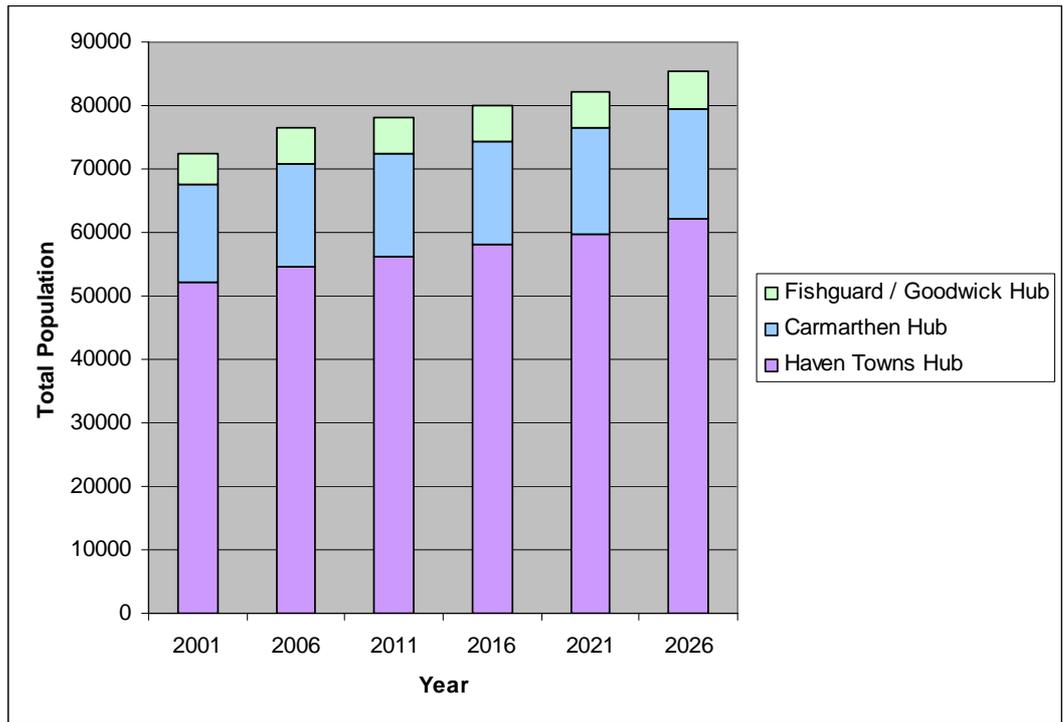
- 3.6 The reality is that in a rural area such as the Pembrokeshire – The Haven Spatial Plan Area, it is not possible to seek to achieve self-containment at a settlement level and so there will be a need to travel for some facilities. However, it is essential to ensure an appropriate distribution of services and facilities is built around an understanding of the location of the population so that it might best meet their needs.
- 3.7 The evidence report shows how the Haven Towns Hub is the largest both geographically and in terms of its current and anticipated population. It is forecast that it will grow most substantially over the period to 2026 such that its importance as a population centre will become even more significant. The implication of this is that this area will remain at the heart of all complementary relationships in the future; its status as the main population centre within the Spatial Plan Area will establish opportunities for the development of other roles to serve the surrounding area. Notwithstanding the current economic climate, the historical strength of the housing market within the Haven Towns Hub, together with the relatively high number of housing completions creates a confidence regarding ability to achieve the necessary increase in development that will be required in order to ensure the future delivery of housing allocations in the longer term. The availability of sites within the Haven Towns Hub and the sustainability of settlements underline its suitability as a focal point for an increased supply of housing.
- 3.8 The nature of the physical proximity between the Haven Towns and their established relationships is that it is important to consider the hub together albeit that the towns will perform very different roles and functions. As a result of population and housing growth, it is anticipated that Haverfordwest and Milford Haven will be similar in size by 2026 and will therefore both have a substantial level of need for a wide range of services and facilities. The southern part of the Haven Towns Hub (in particular, Pembroke and Pembroke Dock) will also continue to grow as major population and housing centres, enabling a complementary distribution of population on each side of the Milford Haven Waterway and supporting a level of complementarity in the demand for and supply of services and facilities throughout this large hub.



Source: Experian Retail Planner 2006 – Lower Super Output Area Projections

Fig 3 Projections for the Population of Settlements in the Haven Towns Hub - 2001 to 2026

- 3.9 Although the level of population and housing growth in the Haven Towns is forecast to be greater than in any other part of the Spatial Plan Area, Carmarthen is, and will remain the largest individual settlement and the main population centre within Pembrokeshire – The Haven. The dominance of all of these main centres within the Spatial Plan Area is recognised in respect of their role in providing other services and will importantly be supported by their large resident population
- 3.10 The Fishguard Hub is expected to remain a small population centre with both settlements accommodating only a limited level of population growth and anticipated housing development. However, in spite of their limited size, Fishguard and Goodwick do have an important role to play in supporting the surrounding parts of north Pembrokeshire. The modest growth that is anticipated should be recognised as a basis by which an increased function might be achieved.



Source: Experian Retail Planner 2006 – Lower Super Output Area Projections

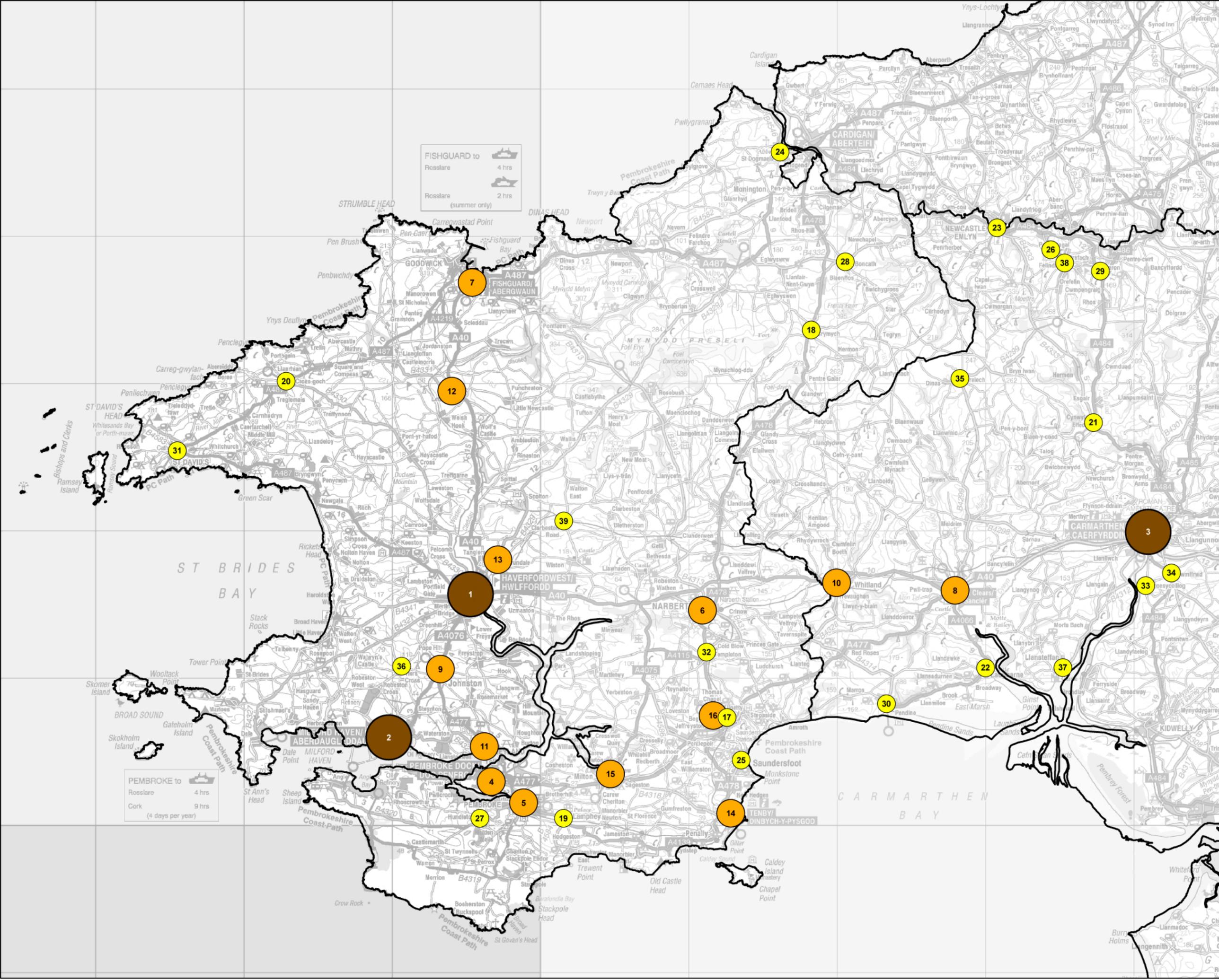
Fig 4 Population Projections for Pembrokehire - The Haven Hubs

3.11

Although population projections can provide an important basis for the assessment of future housing requirements, they should be set against policy aspirations for individual settlements and for the overall direction of growth within the local authority areas and the Spatial Plan Area as a whole. The current LDP processes provide an important opportunity to steer growth and consideration should be given regarding the directions of growth and the ways in which this would contribute towards a greater level of complementarity within the Spatial Plan Area. However, any consideration of the scale and direction of growth within individual settlements should be set within the context of an understanding of the environmental and sustainability capacity to accommodate additional development, both in terms of strategic considerations and any site constraints.

3.12

The main settlements have the potential to accommodate the greatest level of growth in the most sustainable manner. Subject to a consideration of environmental capacity, the role of the Primary Key Settlements as the main employment, retail and leisure centres would result in their expansion for residential purposes would provide the most reliable basis for the enhancement of complementary relationships. Residential development will also occur in smaller centres where it can help to sustain existing and future facilities and communities. However, the physical capacity of such centres is likely to be lower and so a firm policy stance (in respect of allocations and windfall releases) should be adopted in order to prevent an unsustainable level of



**Key**

Local Authority boundary

**Housing Allocations: Number of Residential Units Allocated**

- 500+ Dwellings
- 100-499 Dwellings
- 20-99 Dwellings

**Centre: 500+ Dwellings**

- Haverfordwest (1859)
- Milford Haven (1021)
- Carmarthen (642)

**Centre: 100-499 Dwellings**

- Pembroke Dock (496)
- Pembroke (363)
- Narberth (335)
- Fishguard (273)
- St Clears (270)
- Johnston (218)
- Whitland (216)
- Neyland (181)
- Letterston (140)
- Crundale (126)
- Tenby (120)
- Carew (115)
- Begelly (115)

**Centre: 20-99 Dwellings**

- Kilgetty (82)
- Crymych (80)
- Lamphey (70)
- Croes-goch (64)
- Cynwyl Elfed (62)
- Laugharne (50)
- Newcastle Emlyn (48)
- St Dogmaels (40)
- Saundersfoot (35)
- Waungilwen (35)
- Hundleton (30)
- Boncath (30)
- Saron (30)
- Pendine (26)
- St Davids (25)
- Templeton (25)
- Croesyceiliog (25)
- Cwmfrwd (23)
- Trelech (22)
- Tiers Cross (22)
- Llansteffan (20)
- Drefach Frelindre (20)
- Clarbston Road (20)



Project: Pembrokeshire Haven Complementarity Study

Title: Figure 5  
Housing Allocations

Client: Welsh Assembly Government

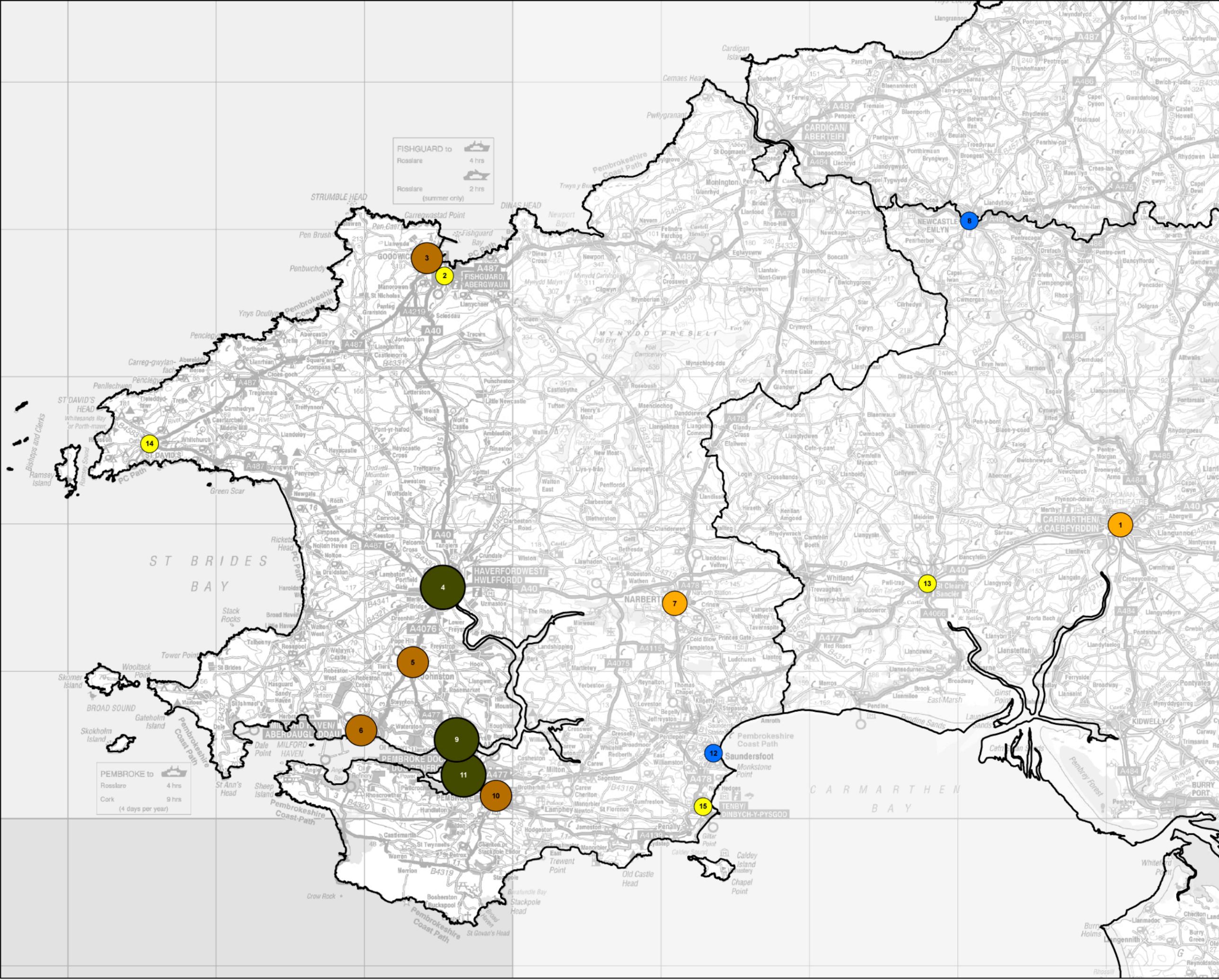
Date: 30.04.09

Scale: 1 : 230,000 @ A3

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Dwg. No: GIS30576-038

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GIS Reference: S:WE30576 - Pembrokeshire Haven Complementarity Study/WE30576 - Pembrokeshire Haven Complementarity Study - Housing Allocations - 30.04.09.mxd



FISHGUARD to Rosslare 4 hrs  
Rosslare (summer only) 2 hrs

PEMBROKE to Rosslare 4 hrs  
Cork 9 hrs  
(4 days per year)

**Key**

Local Authority boundary

**Population Projections: % Increase (2006-2026)\***

- 15.01% and more
- 10.01% to 15.00%
- 5.01% to 10.00%
- 0.01% to 5.00%
- 5.00% to -0.00%

\* Source: Experian Retail Planner 2006

- Settlement**
1. Carmarthen (6.68%)
  2. Fishguard (0.87%)
  3. Goodwick (10.18%)
  4. Haverfordwest (17.95%)
  5. Johnston (10.11%)
  6. Milford Haven (11.95%)
  7. Narberth (6.99%)
  8. Newcastle Emlyn (-1.4%)
  9. Neyland (15.78%)
  10. Pembroke (10.74%)
  11. Pembroke Dock (15.80%)
  12. Saundersfoot (-0.86%)
  13. St Clears (4.45%)
  14. St Davids (2.68%)
  15. Tenby (4.71%)

**nlp Nathaniel Lichfield and Partners**

Project: Pembrokeshire Haven Complementarity Study

Title: Figure 6 Population Projections: % Increase, 2006-2026

Client: Welsh Assembly Government

Date: 29.04.09

Scale: 1 : 230,000 @ A3

Drawn by: MAR

Dwg. No: GIS30576-037

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growth that might serve to undermine complementary relationships between settlements.

- 3.13 Future population growth within the Spatial Plan Area is expected to be a function of net in-migration rather than natural change. Many people will be attracted into the larger centres because of the greater level of facilities and services, a trend that is expected to continue as the role of the main centres continues to increase. In addition, it is important to recognise the influence of the natural environment and quality of life factors upon migration patterns. Many people (especially those that move to the area for retirement and for the quality of life that characterises the local area) may be attracted to smaller settlements away from the main centres. The implications of this upon the future delivery of housing will need to be carefully considered so as to ensure that the supply of and demand for housing can be balanced in a sustainable manner. There is a risk that supplying housing in line with the pattern of demand would hinder the achievement of complementarity. However, it is important that the supply of housing is capable of reflecting the nature of demand and thereby deliver a more balanced and socially inclusive distribution of population. New development in rural communities should therefore be directed towards meeting the needs of the existing local community. It must not result either in an unsustainable level of development away from the main settlements or in an increased level of competition for housing which might result in price rises and have an adverse impact upon the ability of some sectors of the local community to enter into the housing market.
- 3.14 This serves to highlight the particular importance of ensuring an adequate supply of affordable housing in the main centres and also in smaller settlements. This should be viewed as a key focus of attention for housing policies and a means by which the pressure arising from in-migrants that wish to live in rural parts of the Spatial Plan Area might be addressed and unsustainable forms of housing development might be avoided. The use of rural exceptions affordable housing policies can be very important in helping to meet the demand for such properties as and where they arise. Other potential delivery mechanisms should also be sought, including direct public sector intervention, 100% affordable housing requirements in certain locations, as identified in an up-to-date housing affordability study. In addition, a requirement for Section 106 agreements to provide for affordable housing will similarly be important in contributing towards the increased provision that is required and also in the provision of socially balanced and inclusive communities.
- 3.15 In respect of all types of housing supply, the use of local housing strategies, local housing market assessments and affordable housing delivery plans will be important in identifying the type, size and distribution of demand and anticipated supply. These use of these documents to inform housing delivery would also help to ensure that complementarity can be achieved between local population and housing and between the role of different settlements as population centres and locations for other functions.

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3.16 It is evident that population growth and housing development will take place throughout the Spatial Plan Area, including outside of the hubs. In addition to ensuring that the locational requirements of the growing population can be met, this would also provide the basis for the enhancement of smaller settlements so that they might act as more vibrant and socially inclusive centres which complement the network of the Primary Key Settlements. The development of strong population centres which provide a range and mix of housing proportionate to their role as balanced centres around the Spatial Plan Area therefore represents a vital component of complementarity.

### **Conclusion**

3.17 In summary, it is clear that population growth and residential development represent the basis by which the complementarity of different settlements might be better understood. In order to meet the demands of the local population, it is important to ensure that there can be a complementarity between population levels and housing (including affordable housing) provision. This will require a very careful consideration of the maintenance of an appropriate distribution and type of housing – sufficient to meet needs but not too much at the detriment of other areas or at the expense of deliverability – and the measures that might be employed to facilitate house building in the short term.

3.18 In addition, in considering the ways in which an understanding of population growth provides a basis for the development of increasingly complementary relationships, regard should be given to:

- a The implications of an ageing population in respect of the likely demand for specialist forms of accommodation and the necessary distribution and accessibility of services and facilities; and,
- b The extent to which the population of the Spatial Plan Area is subject to seasonal variations as a result of its importance as a holiday destination. This raises issues, not only in respect of the provision of tourist accommodation and facilities, but also in relation to the need to provide retail and leisure services and an adequate level of public services and infrastructure so that resources might be used most efficiently whilst also seeking to minimise peak time congestion.

3.19 Finally, it is vital that the challenge of delivering growth is recognised and that adequate consideration is given to the ways in which a balance can be achieved between the development that is required and the need to preserve and enhance the quality of the natural environment within the Spatial Plan Area. It is recognised that all settlements have an optimum level scale and potential capacity beyond which, any further growth would be unsustainable. In seeking to consider the anticipated levels of population and housing growth within the Spatial Plan Area and the implications in terms of service and facility requirements, careful consideration should be given to these physical

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capacities – which will be different for all settlements. Essentially, this requires a complementarity between growth and environmental constraints.

## **Employment**

- 3.20 The vision for the Spatial Plan Area that has been established by the Wales Spatial Plan focuses largely upon the economy of the Pembrokeshire – The Haven area. Its aim for a network of strong communities supported by a robust, sustainable, diverse, high value-added economy provides the starting point for any consideration of complementarity in respect of employment and economic issues. Given the importance of acknowledging environmental capacity issues, these ambitions must be set against an appreciation of the environmental capacity of the Spatial Plan Area to accommodate economic growth and the extent to which this would lead to balanced and equitable communities.
- 3.21 The evidence report shows that at present the Spatial Plan Area has a narrow economic base. Whilst it does have some important economic strengths – which should be supported – this situation creates a vulnerability and may serve to limit opportunities for further investment and development. It is recognised that the character of the local economy within Pembrokeshire – The Haven will continue to be shaped by its rural nature, the scale of the settlements and its location in Wales, but there are nevertheless options for the development of existing and new sectors and the promotion of the economic well-being of the economy.
- 3.22 Efforts to enhance the range and number of businesses that operate within the Spatial Plan Area must be set against an understanding of the challenge that exists in respect of business attraction. The reality in this rural area is one of a limited population, small settlements and lack of graduates. It is important to seek to respond to these matters by establishing realistic and reasonable aspirations regarding business and economic growth. In this context, the need for complementarity between settlements is even more acute in terms of maximising the employment and economic opportunities that do exist and in ensuring a critical mass – and increased attractiveness – in the local area.
- 3.23 In essence, complementarity is rooted in diversity of economic opportunities and the promotion of the strength of the main centres as the key employment locations, recognising that each has the capacity to serve different economic sectors and functions and that these different roles can complement one another and can contribute towards the overall strength of the Spatial Plan Area.

### **Complementarity of employment and economic activities**

- 3.24 Whilst the main settlements will continue to act as the principal foundation upon which the local economy is developed, a level of complementarity can also be established through a recognition of the employment capacity that exists within smaller centres and rural areas. Although these will not attract the same level of investment or activity, the promotion of smaller scale business

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functions (from specific business premises and through home working) would be important in boosting the strength of the local economy within the Spatial Plan Area and the strength and vitality of local communities. The role of agriculture and tourism are particular examples of how small settlements and rural areas can develop and important economic role which might complement the role and functions of other settlements elsewhere in the Spatial Plan Area.

- 3.25 Given its size and the nature of existing economic activities, it is expected that the Haven Towns Hub will remain the largest employment centre. Within the hub, it is evident that clear opportunities will arise within the different towns, building upon their existing roles and functions and the potential for the development of related activities. These will be important in contributing towards the vision for the area and the ability of the towns to serve the wider area.
- 3.26 Although as a hub, it is smaller than the Haven Towns, Carmarthen is and will remain the largest individual employment centre within the Spatial Plan Area and will continue to represent a dominant force within the local economy. Its location at the eastern part of the Spatial Plan Area and its connections to Llanelli, Swansea and other larger centres to the east creates substantial opportunities for its continued development and promotion. The benefits of these connections – in respect of the promotion of Carmarthen as an ‘alternative’ economic centre and the potential to develop closer economic links with the larger settlements – should be identified and the economic development strategy for Carmarthenshire and the Spatial Plan Area as a whole should seek to ensure that the benefits of its location shape the long term economic position of the town.
- 3.27 There is already a clear sense of complementarity between Carmarthen and the Haven Towns and within the Haven Towns Hub in respect of the scale of employment provision and the nature of the local economy. Both Haverfordwest and Carmarthen serve important public sector and retail functions and also have a basis for the continued development of business services. The relative similarities of the two towns in population and employment terms do not appear to have any detrimental impact upon their individual well-being or their contribution to the Spatial Plan Area as they serve different geographical areas. They can therefore be seen to serve roles in different geographical locations. It will be important to ensure that this is maintained in the future and that the development of one of the towns is not detrimental to the other in that a significantly enhanced role of one settlement does not undermine the relative attractiveness of another. This does not mean that growth in either settlement should be constrained by policy but rather that they should both be supported and encouraged as viable growth and expanding employment centres.
- 3.28 Complementarity also exists within the Haven Towns Hub, particularly in respect of the different roles served by Haverfordwest compared to Milford Haven and Pembroke Dock. Given the geographical proximity of the Haven towns, this different economic focus provides a particularly important basis for