



# Nathaniel Lichfield and Partners

Planning Design Economics

## **EXECUTIVE SUMMARY**

### **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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## Context

- 1 The Wales Spatial Plan sets out an aspiration for the settlements within the Pembrokeshire – The Haven Spatial Plan Area to develop so that they are able to perform complementary roles and functions and thereby work together more effectively.
- 2 This study builds upon this requirement by considering the existing role and function of, and the relationship between, the hubs and settlements within the Spatial Plan Area and advising on the ways in which these might be enhanced. It provides recommendations that will facilitate:
  - a Greater levels of sustainability;
  - b An improvement in the viability and economic wellbeing of the area;
  - c Better levels of service provision and delivery; and,
  - d The establishment of a greater quality of life for those that live and work in and those that visit the area.
- 3 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.
- 4 The vision for the area contained within the Wales Spatial Plan sets a clear basis for action and is supported by a number of strategic priorities:

*“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.”*
- 5 Building upon an understanding of the local context, this study considers 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.

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## Complementarity

- 6 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.
- 7 Complementarity concerns the way in which 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:** 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).
  - b **Functional complementarity:** Settlements located relatively close to one another might perform different roles or a different scale of function.
- 8 The relationships between the different settlements are likely to be complex. An individual settlement might have both locational and functional connections with other centres. 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.
- 9 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.
- 10 Against this understanding of complementarity, the vision is for:

*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.*
- 11 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

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provision of services and the accommodation of future growth. In so doing, each centre will contribute towards 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. Together, these components will contribute towards an increased sense of well-being within the Spatial Plan Area.

- 12 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. 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.
- 13 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.
- 14 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 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.

## Future Settlement Roles and Relationships

<b>Carmarthen: Regional Centre and County Town</b>	Objective	To maintain the town's role as the main centre within the Spatial Plan Area, enhance its overall offer and attractiveness and improve connections with other parts of the Spatial Plan Area and adjoining Spatial Plan Areas.
	Population	<ul style="list-style-type: none"> <li>Largest town in Spatial Plan Area, major focus of on-going residential development, including affordable housing.</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>Largest employment centre in the Spatial Plan Area and the main focus for employment activity. Location of Carmarthen provides opportunities for its continued development and promotion as an economic centre.</li> <li>Economic base to remain focused upon public sector and retail activities.</li> <li>Potential to seek to attract additional public sector activity (e.g. Welsh Assembly Government / national government functions) and to further enhance the retail role.</li> <li>Strengthening of business activities sector to serve the local market and the promotion of high technology / R&amp;D activities – this would require specific policy support in favour of Carmarthen in addition to Llanelli and Cross Hands and the establishment of appropriate facilities (e.g. small scale science park or Technium). Potential opportunity also exists for the promotion of R&amp;D activities to be promoted at the hospital.</li> </ul>
	Retail	<ul style="list-style-type: none"> <li>Dominant retail centre in the Spatial Plan Area. Large catchment area, serving all of the Pembrokeshire – The Haven Spatial Plan Area and parts of Central Wales and Swansea Bay Spatial Plan Areas.</li> <li>Strong town centre with substantial comparison and convenience floorspace and a well defined sense of place helping to attract visitors and reduce the outflow of expenditure.</li> <li>New shopping centre to be important in enhancing the town's retail offer. This enhanced role is to be built upon in order to maintain the strength of Carmarthen as the dominant retail centre within the Spatial Plan Area.</li> </ul>
	Leisure	<ul style="list-style-type: none"> <li>Range of leisure facilities needs improving to reflect the identified shortage. Proposed multiplex Apollo cinema will contribute to this.</li> <li>Potential exists for further improvements in the local leisure offer in order to complement the town's retail offer.</li> </ul>

Tourism	<ul style="list-style-type: none"> <li>• Currently serves a limited tourism role but recognised potential for tourism activity drawing upon its strong links to Coastal Corridor, Pembrokeshire and Central Wales.</li> <li>• Opportunity to develop facilities and functions for tourists, drawing upon the current retail offer and future expanded leisure offer.</li> <li>• Focus of quality accommodation and hospitality to provide for a complementary role with other tourist centres especially wet weather and out of season activities.</li> </ul>
Public Services	<ul style="list-style-type: none"> <li>• Major health, education and public service centre, serving the eastern part of the Pembrokeshire – The Haven Spatial Plan Area and parts of the Central Wales and Swansea Bay Spatial Plan Areas.</li> </ul>
Complementary Roles	<ul style="list-style-type: none"> <li>• Primary settlement within the Spatial Plan Area. Other towns to serve complementary role alongside Carmarthen.</li> <li>• Locational complementarity with Haverfordwest as the two main settlements within the Spatial Plan Area.</li> <li>• Employment complementarity with other centres – both those offering a similar range of services (e.g. Haverfordwest) and those offering a different or smaller range of opportunities.</li> <li>• Major retail role and potential for future improvement in leisure offer to reflect its status as the main settlement within the Spatial Plan Area. Other centres to complement this role and importance.</li> <li>• Key gateway location into the Spatial Plan Area and resulting tourism role complementary to that of the Coastal Corridor.</li> </ul>
Key Actions Required	<ul style="list-style-type: none"> <li>• Pursue long term sustainable growth of the town in order to build upon its current status and function.</li> <li>• Allocate land for residential, employment, retail and leisure development.</li> <li>• Ensure sufficient provision and type of housing (including affordable housing) to maintain attractiveness.</li> <li>• Given its importance to the SPA, need to diversity economic base – identify priority sectors and establish appropriate physical capacity for development</li> <li>• Build upon existing retail and particularly the leisure role to further enhance its attractiveness and ability to adequately serve the local community and surrounding area as a major regional centre</li> <li>• Improve the quality of tourism facilities (accommodation, activities and hospitality) to exploit the gateway status and complement the role of the coastal corridor.</li> <li>• Enhance connectivity with other parts of the Spatial Plan Area and the wider area and address any internal barriers to movement.</li> </ul>

<b>Haverfordwest: Sub-Regional Centre and County Town</b>	Objective	To enhance its status as the second centre within the Spatial Plan Area and the dominant centre within Pembrokeshire and the Haven Towns Hub. To enhance its ability to serve its local population and those living within the wider area and to improve connections with other parts of Pembrokeshire and the Spatial Plan Area.
	Population	<ul style="list-style-type: none"> <li>• Major population centre</li> <li>• Anticipated highest level of population growth expected to result in Haverfordwest becoming largest town in Pembrokeshire</li> <li>• Major focus for residential development, including affordable housing.</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>• Largest employment centre in Pembrokeshire; second largest employment centre in Spatial Plan Area.</li> <li>• Economic base expected to continue to mirror that of Carmarthen with a continued to focus upon the public sector and retail activities and potential to seek to attract additional public sector activity (e.g. Welsh Assembly Government / national government functions) and to further enhance the retail role.</li> <li>• Anticipated diversification of the local economy as a result of the further strengthening of business activities sector to serve the local area and the promotion of high technology / R&amp;D facilities in conjunction with growth at Milford Haven and Pembroke Dock. The opportunity may exist for the Haven Towns Hub to develop a stronger base in these added value sectors than could be achieved at Carmarthen.</li> <li>• Potential opportunities also exist for increased economic role associated with the enhancement of Withybush aerodrome and the hospital.</li> </ul>
	Retail	<ul style="list-style-type: none"> <li>• Key retail centre in Haven Towns Hub and Pembrokeshire serving the needs of the local population and the western part of the Spatial Plan Area.</li> <li>• Need for improvement to town centre in order to maintain complementary relationship with Carmarthen. This might include the identification of sites for larger retail units, physical improvements to the town centre and the enhancement of connections with Withybush Retail Park.</li> </ul>
	Leisure	<ul style="list-style-type: none"> <li>• Major focus for leisure activities with a good existing offer which is supported by an increasing range and quality of provision elsewhere in the Haven Towns hub.</li> </ul>
	Tourism	<ul style="list-style-type: none"> <li>• Limited tourism role at present but opportunities to expand and to offer a range of facilities to complement those available in the larger tourism centres such as the Coastal Corridor.</li> <li>• Centre for high quality accommodation, hospitality and visitor attractions which, together with an attractive town centre with an identified and unique sense of place, will complement the tourist offer of the Coastal Corridor to complement role</li> </ul>



		of other centres, especially in bad weather and out of season.
	Public Services	<ul style="list-style-type: none"> <li>Major health, education and public service centre, serving the western part of the Pembrokeshire – The Haven Spatial Plan Area</li> </ul>
	Complementary Roles	<ul style="list-style-type: none"> <li>Considerable complementarity with Carmarthen in serving similar roles in different parts of the Spatial Plan Area, although need to enhance retail offer in order to ensure that the retail complementarity is not lost.</li> <li>Dominant settlement within Pembrokeshire; other settlements serve complementary roles in respect of the scale and type of employment, retail and leisure facilities.</li> <li>Employment complementarity with Milford Haven and Pembroke Dock in respect of the different type of employment sectors that are represented and the opportunities that are available.</li> <li>Major retail role and potential for future improvement in leisure offer to reflect its status as the main settlement within the Spatial Plan Area. Other centres to complement this role and importance.</li> <li>Potential for tourism development to build upon the improving retail and leisure offer and complementary to that of the Coastal Corridor by providing a variety in the opportunities that are available to visitors, particularly in off-peak periods and when the weather is not good.</li> </ul>
	Key Actions Required	<ul style="list-style-type: none"> <li>Pursue long term sustainable growth of the town in order to build upon its current status and function.</li> <li>Allocate land for residential, employment, retail and leisure development.</li> <li>Ensure sufficient provision and type of housing (including affordable housing) to maintain attractiveness</li> <li>Diversification of economic base to build upon existing strengths and to exploit recognised opportunities.</li> <li>Provision of sufficient facilities (in an appropriate location and of an adequate scale and type) to enable the delivery of anticipated economic in existing and emerging sectors.</li> <li>Enhancement of town centre and range of retail facilities to ensure that it is not left behind by enhancements in the role of Carmarthen and can maintain a strong role as an attractive and vibrant centre.</li> <li>Improvement of tourism facilities and contribution to the important tourism sector within the Spatial Plan Area in order to enhance the offer and attractiveness of Pembrokeshire – The Haven to visitors.</li> <li>Enhance connectivity with other parts of the Spatial Plan Area and address any internal barriers to movement.</li> </ul>

<b>Milford Haven: Primary key settlement</b>	Objective	<ul style="list-style-type: none"> <li>○ To build upon its considerable strengths as a residential and employment centre and to strengthen its retail and leisure offer through its rejuvenation as a smaller town centre which is oriented towards meeting the needs of the local community in a manner that complements the larger role of other centres. To improve connections with other parts of Pembrokeshire and the Spatial Plan Area</li> </ul>
	Population	<ul style="list-style-type: none"> <li>○ Major and expanding population centre which is forecast to become equal in size to Haverfordwest.</li> <li>○ Focus for residential development, including affordable housing.</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>• Important employment centre within Haven Towns Hub but smaller than Haverfordwest.</li> <li>• A particular (and increasing) role as a base for energy and port-based activities.</li> <li>• Future centre for associated activities, included high value added activities, environmental technologies, R&amp;D and marine technologies drawing upon the increasing strength of the Milford Haven Waterway as a major commercial centre.</li> </ul>
	Retail	<ul style="list-style-type: none"> <li>• Small-scale town centre serving the convenience retail needs of the local population.</li> <li>• Limited role in attracting retail expenditure from wider area.</li> </ul>
	Leisure	<ul style="list-style-type: none"> <li>• Important centre for marine and heritage based leisure opportunities.</li> </ul>
	Tourism	<ul style="list-style-type: none"> <li>• Important centre for marine and heritage based opportunities to complement the role of the key tourism centres.</li> <li>• Centre as gateway to Marloes and Dale Heritage Coast</li> </ul>
	Complementary Roles	<ul style="list-style-type: none"> <li>• Complementary to Haverfordwest as important employment and population centre.</li> <li>• Focus upon heavier industrial sectors complementary to Haverfordwest in helping to diversity the economy of the Haven Towns hub.</li> <li>• Complementary to the role of Pembroke Dock to the south of the Milford Haven Waterway in strengthening the profile of this area as a major energy base – important to ensure that this complementary relationship as a broad ‘energy hub’ is maintained in the future as the opportunities to diversify into emerging sectors is realised.</li> <li>• Potential for high tech employment and R&amp;D sectors able to complement with similar opportunities in Pembroke Dock and emerging potential in Haverfordwest and Carmarthen.</li> <li>• Complementary to Fishguard and Pembroke Dock as port locations.</li> <li>• Retail function complementary both to larger centres (especially Haverfordwest and Pembroke Dock) which will provide a</li> </ul>

		<p>wider range of services and facilities and also with other smaller centres which serve the day-to-day needs of the local catchment.</p> <ul style="list-style-type: none"> <li>• Marine and heritage tourism centre complementary to Coastal Corridor in helping to increase the offer of the Spatial Plan Area.</li> <li>• Potential for the economic activities to conflict with the environmental and tourism characteristics of the area to be managed.</li> </ul>
	<p>Key Actions Required</p>	<ul style="list-style-type: none"> <li>• Identification of locations to accommodate additional housing development, in line with the anticipated scale of growth and address any infrastructure capacity issues that might serve to undermine delivery of additional growth.</li> <li>• Allocate land for residential, employment and leisure development.</li> <li>• Continued promotion of role of Milford Haven as major energy centre and port and identification of opportunities for associated growth of value added activities.</li> <li>• Identification of sites for development of associated but higher value-added operations.</li> <li>• Identification and delivery of commercial opportunities associated with the marina.</li> <li>• Regeneration of town centre to enhance its ability to attract investment and serve the needs of the local population. This would include the improvement of links between the town centre, Retail Park and marina and physical improvements within the (smaller) town centre in order to improve its attractiveness and confidence.</li> <li>• Enhancement of leisure facilities to serve local community and surrounding settlements and to enhance tourism offer as a destination and gateway to the Marloes and Dale Heritage Coast.</li> <li>• Enhance connectivity with other parts of the Spatial Plan Area and address any internal barriers to movement.</li> </ul>

<b>Pembroke Dock: Primary key settlement</b>	Objective	To build upon its considerable strengths as a residential, employment and retail centre. To improve connections with other parts of Pembrokeshire and the Spatial Plan Area
	Population	<ul style="list-style-type: none"> <li>• Third largest settlement in the Haven Towns Hub, major population centre and focus for on-going residential development.</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>• Important and diverse employment centre within Haven Towns Hub – similar in size to Milford Haven with which it shares a particular (and increasing) role as a base for energy and port-based activities.</li> <li>• Future centre for associated activities, included high value added activities, environmental technologies, high technology, R&amp;D and marine technologies drawing upon the increasing strength of the Milford Haven Waterway as a major commercial sector and building upon the recent development of technium and Cledday Bridge Business Park.</li> <li>• Major commercial and passenger port, acting as a gateway into the Spatial Plan Area from Ireland.</li> <li>• Continued (and potentially expanded) role as public sector and retail centre.</li> </ul>
	Retail	<ul style="list-style-type: none"> <li>• Second largest retail centre in Pembrokeshire serving the local population and performing a particularly important role in South Pembrokeshire.</li> </ul>
	Leisure	<ul style="list-style-type: none"> <li>• Major centre for land and water based leisure activities, focused upon the marina and waterside area.</li> <li>• If the Martello Quays development is delivered then the town will become an even more important and attractive leisure destination.</li> </ul>
	Tourism	<ul style="list-style-type: none"> <li>• Complementarity between leisure and tourism role providing basis for enhanced offer to tourists and complementarity with major coastal centres along Coastal Corridor.</li> </ul>
	Public Services	<ul style="list-style-type: none"> <li>• Centre for activity by WAG, PCC, PCNPA and CCW.</li> </ul>
	Complementary Roles	<ul style="list-style-type: none"> <li>• Complementary to Haverfordwest in helping to diversify the Haven Towns hub and as a retail and public sector centre.</li> <li>• Complementary to Milford Haven as a key location for heavier industrial sectors and in strengthening the profile of the Milford Haven Waterway as a nationally important energy base and location for associated higher value-added sectors.</li> <li>• Potential for high tech employment and R&amp;D sectors able to complement with similar opportunities in Pembroke Dock and emerging potential in Haverfordwest and Carmarthen.</li> <li>• Complementary to Fishguard and Milford Haven as port locations.</li> </ul>

		<ul style="list-style-type: none"> <li>• Complementary to Pembroke as a tourism centre. The anticipated improvement in the town's leisure offer will be important in enhancing this relationship.</li> </ul>
	Key Actions Required	<ul style="list-style-type: none"> <li>• Identification of locations to accommodate additional housing development, in line with the anticipated scale of growth and address any infrastructure capacity issues that might serve to undermine delivery of additional growth.</li> <li>• Allocate land for residential, employment, retail and leisure development.</li> <li>• Continued promotion as major energy centre and port and identification of opportunities for associated growth of value added activities.</li> <li>• Promotion of technium and business park as location for development of high-tech economy</li> <li>• Identification of sites for development of associated but higher value-added operations.</li> <li>• Promotion of the port as a basis for the further expansion of energy and associated activities and for increased integration with Ireland.</li> <li>• Promotion of additional retail facilities and opportunities to help maintain and enhance its relative local position and to ensure that the needs of those living in South Pembrokeshire can be better satisfied.</li> <li>• Delivery of additional leisure facilities in response to the opportunities presented by the new Martello Quay scheme.</li> <li>• Promote the town as a visitor destination, drawing particularly upon its retail and leisure offer and its gateway role.</li> <li>• Enhance connectivity with other parts of the Spatial Plan Area and address any internal barriers to movement.</li> </ul>

<b>Pembroke: Primary Key Settlement linked to Pembroke Dock</b>	Objective	To enhance its status both as a linked settlement to Pembroke Dock and as an individual settlement which serves an important role in respect of population, employment and tourism.
	Population	<ul style="list-style-type: none"> <li>o Major population centre and location for additional residential development.</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>• Limited employment provision serving a local function with limited representation in a relatively wide range of functions.</li> <li>• No significant employment sites or locations – representation largely concentrated within the town centre.</li> </ul>
	Retail	<ul style="list-style-type: none"> <li>• District centre complementary to Pembroke Dock.</li> <li>• Specialist retail offer linked to the town’s leisure and tourism role.</li> </ul>
	Leisure	<ul style="list-style-type: none"> <li>• Enhancement is possible – potential development at South Quay.</li> </ul>
	Tourism	<ul style="list-style-type: none"> <li>• Strong tourism role, building upon its existing strengths and potential for development as complementary to/extension of Coastal Corridor</li> </ul>
	Complementary Roles	<ul style="list-style-type: none"> <li>• Serves as a local centre which is complementary to and supports the role of Pembroke Dock in retail and leisure terms.</li> <li>• Complementary to Haverfordwest and other larger settlements as an employment centre which provides a wide range of opportunities.</li> <li>• Complementary to larger tourism centres within the Coastal Corridor and also to the other Haven Towns which have the capacity to develop a greater tourism role in line with the Pembroke model.</li> </ul>
	Key Actions Required	<ul style="list-style-type: none"> <li>• Identification of locations to accommodate additional housing development, in line with the anticipated scale of growth and address any infrastructure capacity issues that might serve to undermine delivery of additional growth.</li> <li>• Build upon the existing broad representation of employment sectors in order to enhance the profile of Pembroke as a business centre and thereby to enhance its complementarity with adjoining settlements.</li> <li>• Enhancement of role as Local Centre.</li> <li>• Potential development of South Quay.</li> <li>• Adjustment of Coastal Corridor to reflect the tourism role of Pembroke.</li> </ul>

<b>Neyland: Primary Key Settlement linked to Milford Haven</b>	Objective	To develop the role and status of Neyland as a linked settlement to Milford Haven as a local retail and water-based leisure/tourism centre.
	Population	<ul style="list-style-type: none"> <li>o Modest population centre – about 1/3 population of Milford Haven</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>• Small scale employment centre with limited representation in a narrow range of sectors.</li> </ul>
	Retail	<ul style="list-style-type: none"> <li>• Local centre with very limited provision</li> </ul>
	Leisure	<ul style="list-style-type: none"> <li>• Important location of water-based leisure activity linked to Neyland marina and yacht club.</li> </ul>
	Tourism	<ul style="list-style-type: none"> <li>• Limited tourism role but potential for water-based leisure activity linked to Neyland marina and yacht club to complement Haven Towns tourism offer and the role of the Coastal Corridor.</li> </ul>
	Complementary Roles	<ul style="list-style-type: none"> <li>• Serves as a local centre which is complementary to and supports the role of Milford Haven.</li> <li>• Local centre retail role complementary to the larger retail locations within the Haven Towns Hub.</li> <li>• Marina function complementary to that of Milford Haven and Goodwick.</li> <li>• Leisure and tourism role complementary to that of Pembroke and the Coastal Corridor although restricted in scope and nature.</li> </ul>
Key Actions Required	<ul style="list-style-type: none"> <li>• Expansion of leisure focused around the marina and yacht club.</li> <li>• Enhancement of local centre role.</li> </ul>	

<b>Fishguard – Goodwick: Key Settlements and Gateway Hub</b>	Objective	To enhance the role of Fishguard/Goodwick as a gateway hub and to improve its ability to serve the needs of the local population and those living in and visiting North Pembrokeshire.
	Population	<ul style="list-style-type: none"> <li>• Very small population centres, mainly focused within Fishguard which accommodates c. 60% of the Hub's population.</li> <li>• Important role in supporting the surrounding area of North Pembrokeshire. Modest future housing growth expected as a basis for an increased local role.</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>• Small scale employment role, dominated by Port.</li> <li>• Key gateway location with potential to develop higher value functions that are complementary to the port function.</li> <li>• Limited representation in other economic sectors but potential opportunities to serve the local area.</li> <li>• Continued reliance on other areas, especially Haverfordwest, as a provider of employment opportunities.</li> </ul>
	Retail	<ul style="list-style-type: none"> <li>• Local retail centre, reliant upon Haverfordwest for most comparison functions.</li> <li>• Potential to serve an increased local retail function as a result of the possible attraction of a food retail operator. This may have a knock-on effect in respect of the potential for increased levels of investment and an enhanced local offer.</li> </ul>
	Leisure	<ul style="list-style-type: none"> <li>• Local leisure offer but possible future marina development to provide basis for expanded leisure function</li> </ul>
	Tourism	<ul style="list-style-type: none"> <li>• Gateway hub to Spatial Plan Area and important centre of tourism activity in North Pembrokeshire.</li> <li>• The port serves as a major element of the local tourism sector and the potential exists to build upon this in order to encourage additional levels of tourist activity within the town.</li> </ul>
	Public Services	<ul style="list-style-type: none"> <li>• No hospital and limited choice of facilities but nevertheless serves important role as health / education / emergency service centre.</li> </ul>
	Complementary Roles	<ul style="list-style-type: none"> <li>• Currently a limited level of complementarity with other settlements in the Spatial Plan Area. This creates an imperative to achieve improvements within the town in order to enhance its profile within the Spatial Plan Area and develop its relationships with other Hubs and settlements.</li> <li>• Complementary to Milford Haven and Pembroke Dock as major port location</li> <li>• Potential to enhance complementarity as a retail centre by attracting food retailer but likely to remain as a local centre to support the position of larger centres</li> </ul>



		<ul style="list-style-type: none"> <li>• Complementary to Coastal Corridor by providing an alternative, smaller scale and more specialist tourist product.</li> <li>• Complementary to Haven Towns in providing a range of tourism facilities to serve the wider area and to offer an alternative to the tourism product that is available within the Coastal Corridor.</li> </ul>
	Key Actions Required	<ul style="list-style-type: none"> <li>• Identify and allocate land for residential development.</li> <li>• Identification of options for an increase in the role and function of the port, including the development of associated (and possible value-added) sectors.</li> <li>• Identification of options for marina development to enhance retail, leisure and residential options.</li> <li>• Identification and allocation of land for future retail development and promote the delivery of the permitted retail store within Fishguard.</li> <li>• Enhancement of tourism role, taking advantage of role as a gateway into the Spatial Plan Area and the quality of the surrounding area.</li> <li>• Potential leisure enhancements to serve local area and to help improve tourist offer</li> <li>• Identification of a particular niche and the delivery of improved accommodation, facilities and access.</li> <li>• Enhance connectivity with other parts of the Spatial Plan Area and address any internal barriers to movement.</li> </ul>

<b>Tenby and Saundersfoot: Major tourism resort acting as hub at heart of the Coastal Corridor</b>	Objective	To continue the key “tourism hub” role of Tenby and Saundersfoot by broadening their appeal and continuing to enhance the quality and range of their offer. Also to continue to develop the role of Tenby in serving the needs of the local population.
	Population	<ul style="list-style-type: none"> <li>• Modest population centres</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>• Employment dominated by tourism activities. Limited additional employment facilities serving local area</li> </ul>
	Retail	<ul style="list-style-type: none"> <li>• Tenby acts as an important local retail centre which serves the needs of the local community as well as serving the tourist market. Saundersfoot has a small scale local retail centre which is principally focused upon serving the tourist market.</li> </ul>
	Leisure	<ul style="list-style-type: none"> <li>• Tenby’s leisure offer is broader than that of Saundersfoot and includes a leisure centre and cinema as well as a wide range of food and drink establishments. These facilities are oriented towards local people and visitors alike.</li> <li>• The leisure attraction in Saundersfoot linked to tourism role – primarily oriented towards the needs of visitors.</li> </ul>
	Tourism	<ul style="list-style-type: none"> <li>• Major tourism centre providing an important basis for key sector within the Spatial Plan Area.</li> <li>• Key accommodation centre with an increasing range and quality of facilities to attract an increased level of higher spending visitors and to encourage a greater level of year-round tourism.</li> </ul>
	Public Services	<ul style="list-style-type: none"> <li>• A cottage hospital and secondary school are located in Tenby.</li> </ul>
	Complementary Roles	<ul style="list-style-type: none"> <li>• Other settlements / hubs complementary to the Tenby – Saundersfoot hub in terms of tourism offer, helping to increase the overall range and quality of the offer within the Spatial Plan Area.</li> <li>• The focus upon the tourism sector is complementary to other centres whose economic base is predominantly focused upon other types of activity, thereby providing a broader foundation for the wider economy.</li> <li>• Local retail and employment role complementary to the more substantial offer within the Haven Towns Hub.</li> <li>• Tenby’s broader provision of services is particularly complementary to that which is available elsewhere in the Spatial</li> </ul>

		Plan Area whilst the focus upon visitors in Saundersfoot is less directly complementary.
	Key Actions Required	<ul style="list-style-type: none"> <li>• Continued enhancement of the quality of the environment, ensuring that the popularity of the Tenby – Saundersfoot hub does not undermine the attractiveness of its appeal.</li> <li>• Broaden the tourist offer to help increase the value of tourism within the hub and to help to reduce the impacts of seasonality – identify opportunities to increase the range of local facilities, for example by additionally focusing upon heritage tourism and specific events.</li> <li>• Seek to promote links with the Haven Towns Hub (and elsewhere) as a basis by which the overall tourism offer of the Spatial Plan Area might be increased.</li> <li>• Enhance connectivity with other parts of the Spatial Plan Area and address any internal barriers to movement.</li> <li>• Build upon the current range of retail and leisure facilities and opportunities that are specifically oriented towards the local community in order to ensure that their needs are met and the towns do not become solely able to meet the needs of visitors.</li> </ul>

<b>St Davids:</b> Acts as a local centre with a good range of facilities serving the town and hinterland.	Population	<ul style="list-style-type: none"> <li>About 1,300 in population.</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>Employment is mainly in tourism and retail (mainly tourist related).</li> <li>The Assemblies plant is no longer operating at full strength.</li> </ul>
	Leisure & Tourism	<ul style="list-style-type: none"> <li>It has a substantial tourism role with the Cathedral as the main focus for visits.</li> <li>The cathedral remains the key attraction in particular the recent Cloisters where significant investment has taken place.</li> <li>Recently completed Oriel y Parc is also providing a focus for visitors.</li> <li>Mainly accommodation B &amp; Bs and hotels. Much of the retail offer is tourist related, for example art galleries.</li> <li>Recreational facilities include rugby club and school playing fields.</li> <li>The local swimming pool has recently been demolished and a gym is proposed in its place.</li> </ul>
	Complementary Role	<ul style="list-style-type: none"> <li>Providing a strong tourism offer and a local service role without competing with the neighbouring centre of Fishguard.</li> </ul>
	Key Actions Required	<ul style="list-style-type: none"> <li>The delivery of affordable housing</li> <li>Increasing employment provision</li> <li>Sustain St Davids's local retail role</li> </ul>

<b>Narberth:</b> Medium sized settlement serving a wider role as a local Market Town for eastern Pembrokeshire, has a niche retail and tourism role.	Population	<ul style="list-style-type: none"> <li>• Modest population centre</li> <li>• 335 dwellings allocated under the JUDP</li> <li>• Potential for low/medium scale housing growth, identified in PCC LDP Preferred Strategy as largest and most significant rural settlement.</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>• One employment sites allocated in JUDP (9.56ha for B1 use).</li> <li>• Identified in the Wales Spatial Plan as having a service centre/employment/tourism function.</li> <li>• Local employers include a large retail sector, agricultural merchants, the health centre, and school.</li> </ul>
	Retail	<ul style="list-style-type: none"> <li>• Narberth is a niche shopping location, based on its strong independent shops and attractive environment. This role should be maintained and enhanced in the future.</li> <li>• Identified as a Main Retail Centre by the PCC LDP Preferred Strategy.</li> </ul>
	Leisure	<ul style="list-style-type: none"> <li>• The Queens Hall is a focus for comedy nights, live music and other entertainment. Narberth also has a significant rugby club and a community centre, the Bloomfield Centre, which includes tennis courts and a swimming pool.</li> </ul>
	Public Sector	<ul style="list-style-type: none"> <li>• Meddygfa Rhiannon Health Centre.</li> <li>• Junior School.</li> </ul>
	Tourism	<ul style="list-style-type: none"> <li>• Narberth plays a significant role as a tourism centre for day trips. The recent Bluestone development nearby may enhance this role.</li> </ul>
	Complementary Roles	<ul style="list-style-type: none"> <li>• Considerable complementarity in acting as a niche retail centre based between Haverfordwest and Carmarthen, accessible within a half hour drive by the majority of Pembrokeshire.</li> </ul>
	Key Actions Required	<ul style="list-style-type: none"> <li>• Maintaining its existing role as a local market town for eastern Pembrokeshire.</li> <li>• Retain its niche retail role.</li> <li>• Maintain its role as a day trip tourism destination.</li> </ul>

<b>Crymch:</b> Small retail and service centre serving wide rural area.	Population	<ul style="list-style-type: none"> <li>• Small population centre</li> <li>• 80 dwellings allocated under the JUDP</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>• Hauliers/agricultural machinery sales are the significant employers, as well as the Secondary School, Leisure Centre and small scale retail employment.</li> </ul>
	Retail	<ul style="list-style-type: none"> <li>• A Local Retail Centre which plays a significant role in serving the broader rural area in North East of Pembrokeshire.</li> </ul>
	Leisure	<ul style="list-style-type: none"> <li>• The Secondary School provides a community based theatre, leisure centre and swimming pool.</li> </ul>
	Public Sector	<ul style="list-style-type: none"> <li>• The Secondary School is a focus for Welsh Language Education in the County.</li> </ul>
	Tourism	<ul style="list-style-type: none"> <li>• Limited tourism role currently but could develop further a role as a gateway to the Preseli's.</li> </ul>
	Complementary Roles	<ul style="list-style-type: none"> <li>• Role in providing retail and educational facilities for the North East of Pembrokeshire results in a high level of complementarity with larger centres in the settlement hubs.</li> </ul>
	Key Actions Required	<ul style="list-style-type: none"> <li>• Develop appropriate small scale employment opportunities and maintain existing rural service centre role.</li> <li>• Maintain Local Retail Centre provision.</li> </ul>

<b>Kilgetty:</b> Small retail and service centre serving residents and tourist population.	Population	<ul style="list-style-type: none"> <li>• Small population centre</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>• Limited employment opportunities.</li> </ul>
	Retail	<ul style="list-style-type: none"> <li>• A Local Retail Centre.</li> <li>• Outline planning permission granted for the relocation of the Co-op Supermarket. The existing store serves the wider area of SE Pembrokeshire</li> </ul>
	Tourism	<ul style="list-style-type: none"> <li>• A number of campsites and caravan sites in the vicinity but limited tourism role.</li> </ul>
	Complementary Roles	<ul style="list-style-type: none"> <li>• Plays a service centre role serving both residents and passing tourists.</li> <li>• Excellent strategic position on the gateway to Pembrokeshire. It is served by a railway connection which links to Pembroke Dock and Tenby and nationally.</li> </ul>
	Key Actions Required	<ul style="list-style-type: none"> <li>• Enhance available facilities to improve offer.</li> <li>• Maintain Local Retail Centre provision.</li> </ul>

<b>Letterston:</b> Small retail and service centre	Population	<ul style="list-style-type: none"> <li>• Small population centre</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>• Employment largely linked to retail or services. A national racing stables outside the settlement.</li> </ul>
	Retail	<ul style="list-style-type: none"> <li>• A Local Retail Centre with shops, restaurants and garage serving a wider rural area.</li> </ul>
	Leisure	<ul style="list-style-type: none"> <li>• Leisure facilities limited to playing fields &amp; go-kart track.</li> </ul>
	Tourism	<ul style="list-style-type: none"> <li>• Limited tourism role – restaurants catering to passing trade – links to Irish ferry traffic – Letterston lies along the Trans-European Road Network &amp; trunk road to Fishguard and Stena Irish Ferry Terminal..</li> </ul>
	Complementary Roles	<ul style="list-style-type: none"> <li>• Limited complementarity although important in providing for the day-to-day needs of the local community and thereby complementing the requirements of larger centres.</li> </ul>
	Key Actions Required	<ul style="list-style-type: none"> <li>• Maintain and enhance existing service centre function.</li> <li>• Maintain Local Retail Centre provision.</li> </ul>

<b>Newport:</b> Local centre with a role in serving hinterland	Population	<ul style="list-style-type: none"> <li>• About 900 in population</li> </ul>
	Employment	<ul style="list-style-type: none"> <li>• Employment is mainly in retail, tourism and there is a small employment park and Econ Centre.</li> </ul>
	Leisure & Tourism	<ul style="list-style-type: none"> <li>• Developing a niche for quiet tourism and sustainable living.</li> <li>• Mainly small scale accommodation B &amp; Bs and small hotels along with a caravan park.</li> <li>• Recreational facilities are mainly school related and small in scale.</li> </ul>
	Complementary Role	<ul style="list-style-type: none"> <li>• Providing a tourism offer and a local service role without competing with neighbouring centres of Fishguard and Cardigan.</li> </ul>
	Key Actions Required	<ul style="list-style-type: none"> <li>• The delivery of affordable housing</li> </ul>



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		<ul style="list-style-type: none"><li>• Increasing employment provision (existing site almost full)</li><li>• Expand role in quiet tourism and sustainable living</li><li>• Sustain Newport's local retail role</li></ul>
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