



# Pembrokeshire County Council

## **Retail Survey Data**

March 2018 Survey

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# 1. Introduction and Summary

2. This document includes survey data and maps from a Pembrokeshire Town Centre Survey conducted in March 2018. The following Town Centres were surveyed:

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

*Please note that Pembrokeshire Coast National Park Authority (PCNPA) conducted the survey for town centres in their planning jurisdiction area. These have been added to this report and highlighted in grey. The PCNPA survey was conducted in July 2017.*

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

## **A Class use classes:**

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

10. A3 uses are food and drink outlets including restaurants, bars, pubs and take-aways.<sup>1</sup>

**Type of Class A property:**

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

**Summary of survey data**

12. The percentage of vacant A class units have increased since March 2017 in three Town Centres - Milford Haven, Pembroke Dock and Fishguard. The vacancy of A class uses has fallen within Milford Marina, Pembroke and Haverfordwest town centres, but are still above the UK national average.
13. Vacancy at Haverfordwest is influenced by the former Riverside Market which is currently being redeveloped for a library, café and art gallery and is now recorded as a single unit. The vacancy of A units at Haverfordwest town centre is less than 2017 levels but still above the national average.
14. Vacancy rates in Haverfordwest, Pembroke Dock, Milford Haven and Fishguard remain above the National Average. Vacancy rates in Pembroke have returned to below the UK National Average. Centres which have a tourism and leisure role continue to perform well, particularly those in the National Park. Levels of betting shops are broadly consistent with previous surveys. The number of charity shops has increased slightly since 2016 survey but is still below 2014 levels.

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

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

## 2.Data for Town Centres 2018

### 2.1 Number of Class A units

Town	Occupied A1	Occupied A2	Occupied A3	Occupied Mixed A class	Vacant A class	Total A class	% vacant A class	Total units vacant (all uses excluding residential)
Fishguard	47	12	19	2	19	99	20%	20
Haverfordwest	120	39	27	1	38	225 <sup>2</sup>	17%	51 <sup>3</sup>
Milford Haven	48	15	15	1	23	102	23%	26
Milford Marina <sup>4</sup>	14	1	5	0	2	22	9%	2
Narberth	52	11	20	2	5	90	6%	5
Pembroke	56	17	21	2	10	106	10%	19
Pembroke Dock	56	16	11	0	29	112	26%	31
Tenby	No break down available				8	179	6	No breakdown available
Saundersfoot					3	65	3	
St Davids					2	60	2	
Solva					1	13	8	
Newport					1	30	4	

Note: Data is for ground floor units only.

UK Town Centre National Average Vacancy rate: 12.2% in 2nd quarter of 2017 (Source Local Data Company). Wales' vacancy rate for Town Centres was 13% in 2017

<sup>2</sup> The Riverside Market is currently being redeveloped and now forms a single vacant unit and accounts for a reduction in the number of units within the town centre compared to 2017.

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

Floorspace	A1 (occupied) floorspace	A2 (occupied) floorspace	A3 (occupied) floorspace	Mixed A class (occupied)	Vacant A class	Grand Total
Fishguard	7536	1397	2829	404	2457	14420
Haverfordwest	22141	5583	3941	141	6500	38307
Milford Haven	5950	2294	2393	215	2530	13384
Milford Marina	1076	59	541	0	123	1800
Narberth	4634	1043	2619	1034	421	9753
Pembroke	8372	2526	3160	360	2024	16443
Pembroke Dock	9849	2593	1307	0	4244	17994
Tenby	Data not available				1254	21464
Saundersfoot					221	6816
St Davids					110	7837
Solva					120	1510
Newport					145	3910

### 2.3 2014 - 2018 Type of Class A Units    A. Unit numbers

	Fishguard	Haverfordwest	Milford Haven	Milford Marina	Narberth	Pembroke	Pembroke Dock
2014 Comparison (occupied)	39	94	30	8	42	34	48
2016 Comparison (occupied)	35	103	30	9	40	35	45
2017 Comparison (occupied)	33	88	31	9	38	33	40
2018 Comparison (occupied)	32	90	34	9	40	33	38
2014 Convenience (occupied)	4	2	3	0	4	4	1
2016 Convenience (occupied)	4	2	3	0	4	3	1
2017 Convenience (occupied)	4	4	3	0	4	5	5
2018 Convenience (occupied)	4	3	3	0	4	6	5
2014 Service (occupied)	43	106	47	11	42	63	45
2016 Service (occupied)	45	100	49	9	43	65	44
2017 Service (occupied)	45	92	47	8	41	59	41
2018 Service (occupied)	43	94	45	11	41	60	40
2014 Comparison/Service (occupied)	0	0	0	0	1	2	0
2016 Comparison/Service (occupied)	0	0	1	0	1	1	0
2017 Comparison / Service (occupied)	0	0	1	0	1	1	0
2018 Comparison / Service (occupied)	0	0	1	0	0	0	0
2016 Unknown (occupied)	0	0	0	0	0	1	0
2017 Unknown (occupied)	0	0	0	0	0	0	0
2018 Unknown (occupied)	0	0	0	0	0	0	0
2014 Vacant	9	42	21	0	2	7	17
2016 Vacant	16	45	18	1	2	8	21

	Fishguard	Haverfordwest	Milford Haven	Milford Marina	Narberth	Pembroke	Pembroke Dock
<b>2017 Vacant</b>	15	62 <sup>5</sup>	18	4	5	13	24
<b>2018 Vacant</b>	19	38 <sup>6</sup>	23	2	5	9	28
<b>2014 Total A class</b>	95	244	101	19	91	109	111
<b>2016 Total A class</b>	100	250	101	19	90	113	111
<b>2017 Total A class</b>	98	246	102	22	89	110	110
<b>2018 Total A class</b>	98	225	106	22	90	108	111

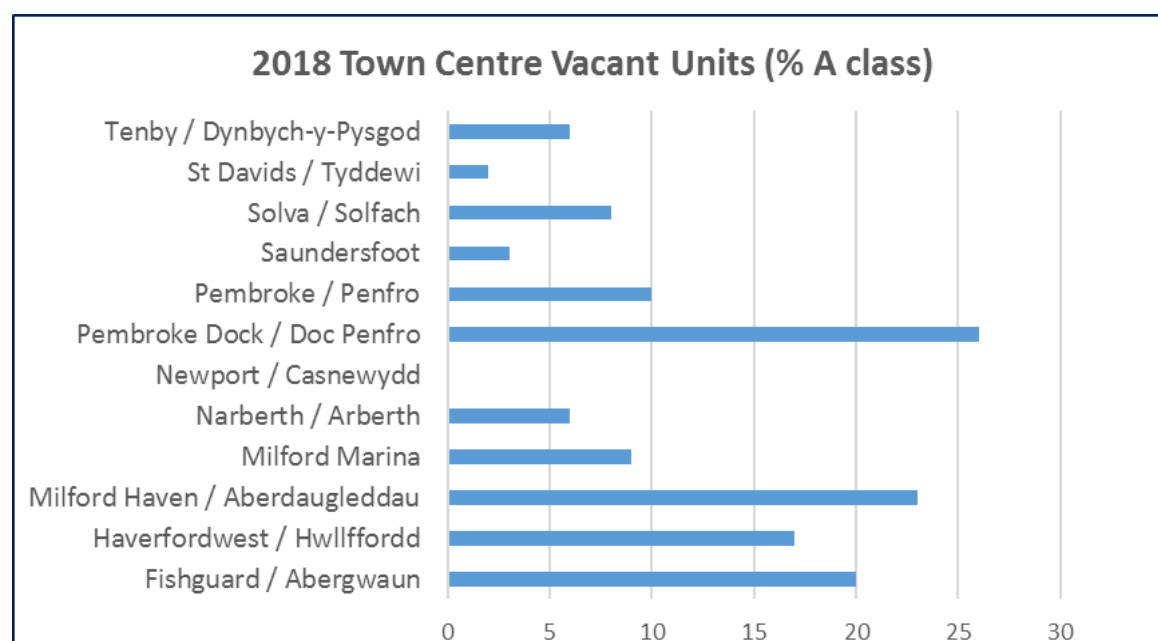
## B. Floorspace (sq m)

Town	Comparison Floorspace (occupied)	Convenience Floorspace (occupied)	Service Floorspace (occupied)	Comparison/Service Floorspace (occupied)	Unknown (occupied)	Vacant	Total
Fishguard	5184	1629	5353	0	0	2457	14426
Haverfordwest	18116	947	12744	0	0	6252	38307
Milford Haven	4036	985	6464	29	0	2530	14044
Milford Marina	711	0	966	0	0	121	1800
Narberth	3308	627	4737	0	0	421	9095
Pembroke	4870	1001	9655	0	0	1988	17514
Pembroke Dock	4723	3860	5166	0	0	4183	17932

<sup>5</sup> Includes individual Riverside Market units

<sup>6</sup> Former Riverside Market is a single unit.

## 2.4 Graph illustrating A Class Vacancy Rates for 2018



## 2.5 Changes in betting shops between 2009 and 2018 (only occupied units shown)

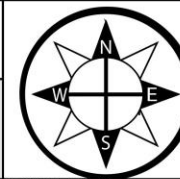
Betting shops Total Numbers								
Town	2009	2011	2012	2013	2014	2016	2017	2018 <sup>7</sup>
Fishguard	1	1	1	1	1	1	1	1
Haverfordwest	2	2	2	2	2	3	3	3
Milford Haven	2	2	3	3	3	3	3	3
Narberth	0	0	1	2	1	1	1	1
Pembroke	1	1	1	2	2	2	1	1
Pembroke Dock	0	1	1	2	2	3	2	2
<b>Total</b>	<b>6</b>	<b>7</b>	<b>9</b>	<b>12</b>	<b>11</b>	<b>13</b>	<b>11</b>	<b>11</b>
Newport	0	0	0	0	0	0	0	0
Saundersfoot	0	-	0	0	0	0	0	0
Solva	0	-	-	0	0	0	0	0
St Davids	0	-	0	0	0	0	0	0
Tenby	2	2	2	3	3	2	2	2
<b>Total</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>3</b>	<b>3</b>	<b>2</b>	<b>2</b>	<b>2</b>
<b>Grand Total</b>	<b>8</b>	<b>9</b>	<b>11</b>	<b>15</b>	<b>14</b>	<b>15</b>	<b>13</b>	<b>13</b>

<sup>7</sup> Pembrokeshire Coast National Park Authority survey undertaken July 2017

## 2.6 Changes in charity shops between 2009 and 2014 (only occupied units shown)

Charity shops								
Town	2009	2011	2012	2013	2014	2016	2017	2018
Fishguard	1	2	3	3	3	2	4	4
Haverfordwest	8	9	9	11	12	11	11	11
Milford Haven	3	3	3	4	4	3	3	4
Narberth	0	3	3	3	3	3	2	3
Pembroke	4	4	4	4	4	4	4	4
Pembroke Dock	1	0	1	7	7	5	5	4
<b>Total</b>	<b>17</b>	<b>21</b>	<b>23</b>	<b>32</b>	<b>33</b>	<b>28</b>	<b>29</b>	<b>30</b>
Newport	-	-	0	0	0	0	0	0
Saundersfoot	0	-	0	0	0	0	0	0
Solva	-	-	-	0	0	0	0	0
St Davids	1	1	1	1	1	1	1	1
Tenby	5	6	6	4	4	4	3	4
<b>Total</b>	<b>6</b>	<b>7</b>	<b>7</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>5</b>
<b>Grand Total</b>	<b>23</b>	<b>28</b>	<b>30</b>	<b>37</b>	<b>38</b>	<b>33</b>	<b>33</b>	<b>35</b>

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



### Key / Allwedd

vacant commerical

Use Class Order

A1

A1/A3

A2

A3

A3/C1

B1

B1/A2

B2

B8

C1

C3

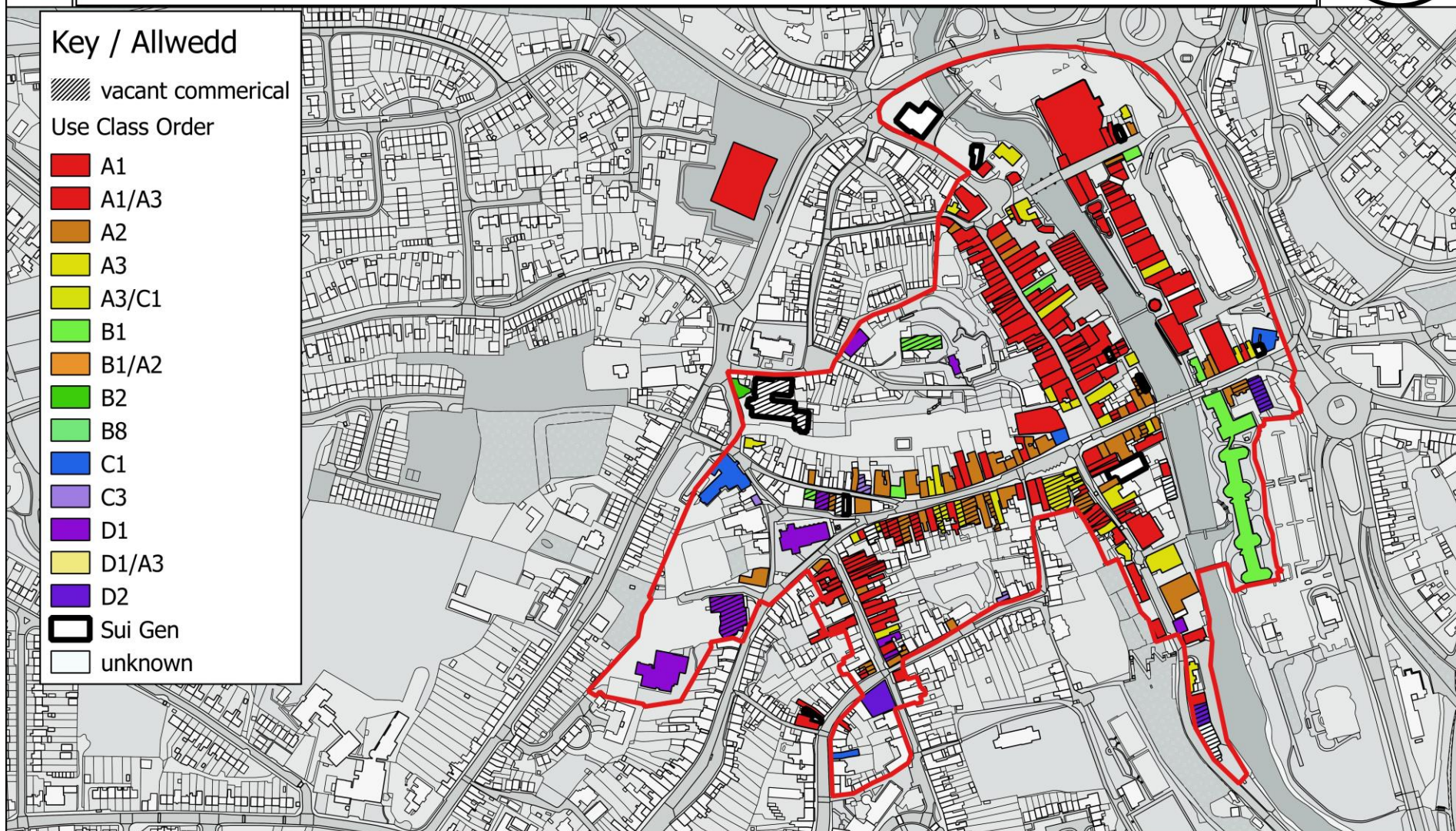
D1

D1/A3

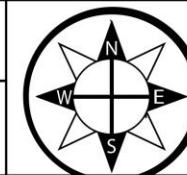
D2

Sui Gen

unknown



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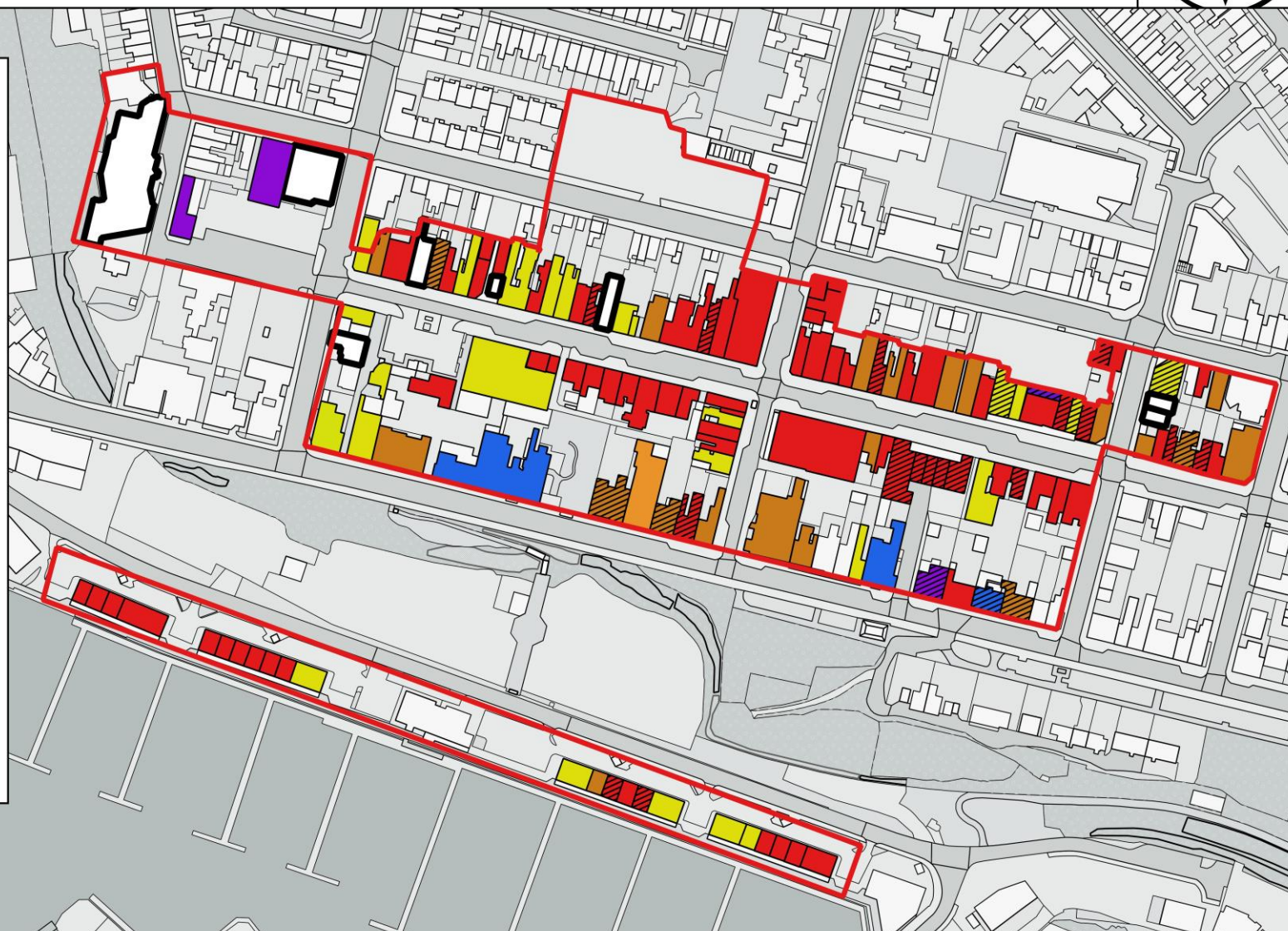


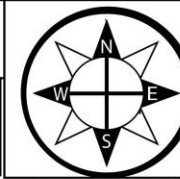
### Key / Allwedd

vacant commerical

Use Class Order

- A1
- A1/A3
- A2
- A3
- A3/C1
- B1
- B1/A2
- B2
- B8
- C1
- C3
- D1
- D1/A3
- D2
- Sui Gen
- unknown





### Key / Allwedd

vacant commercial

Use Class Order

A1

A1/A3

A2

A3

A3/C1

B1

B1/A2

B2

B8

C1

C3

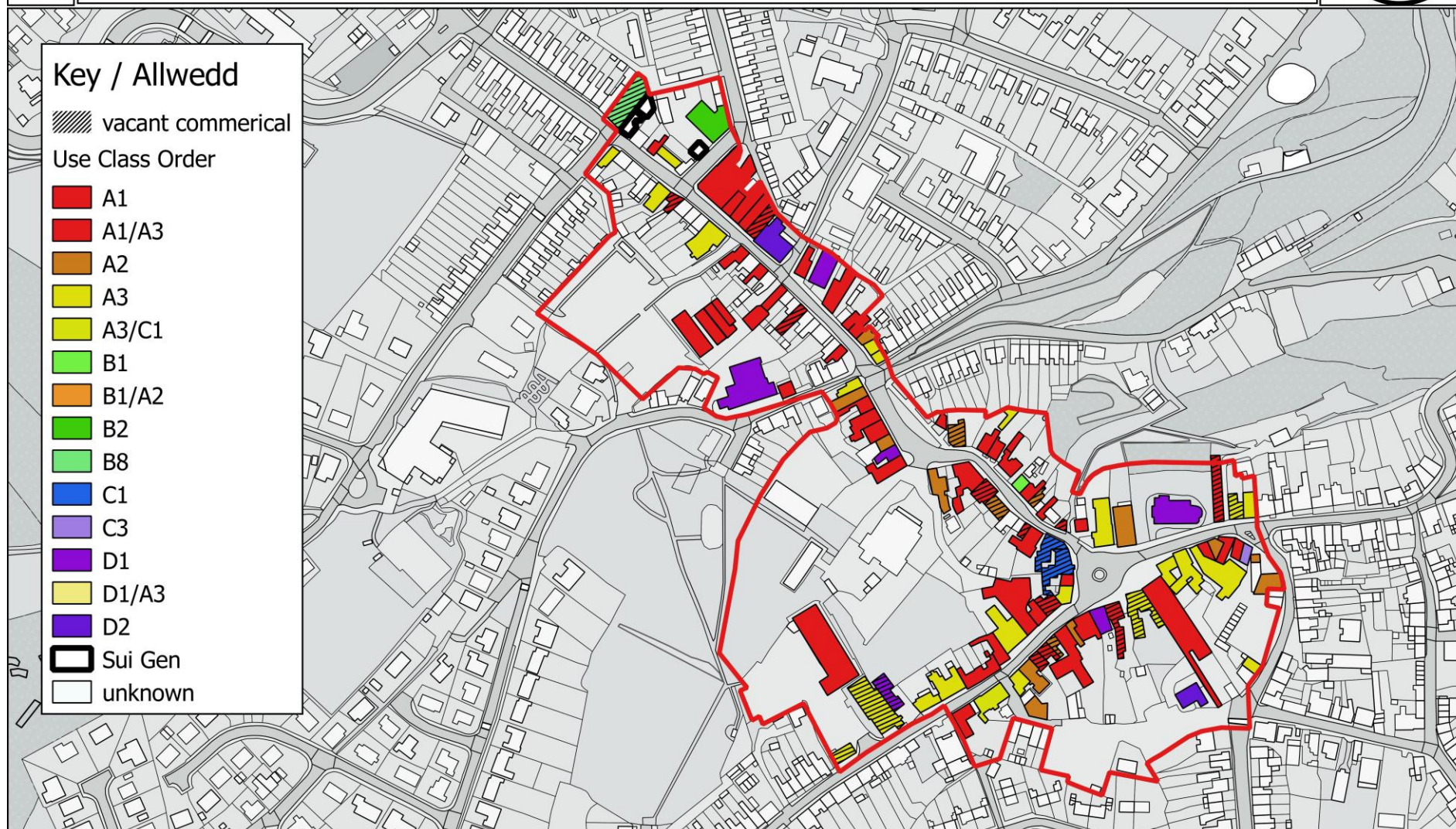
D1

D1/A3

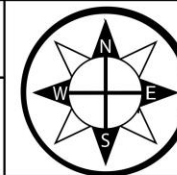
D2

Sui Gen

unknown



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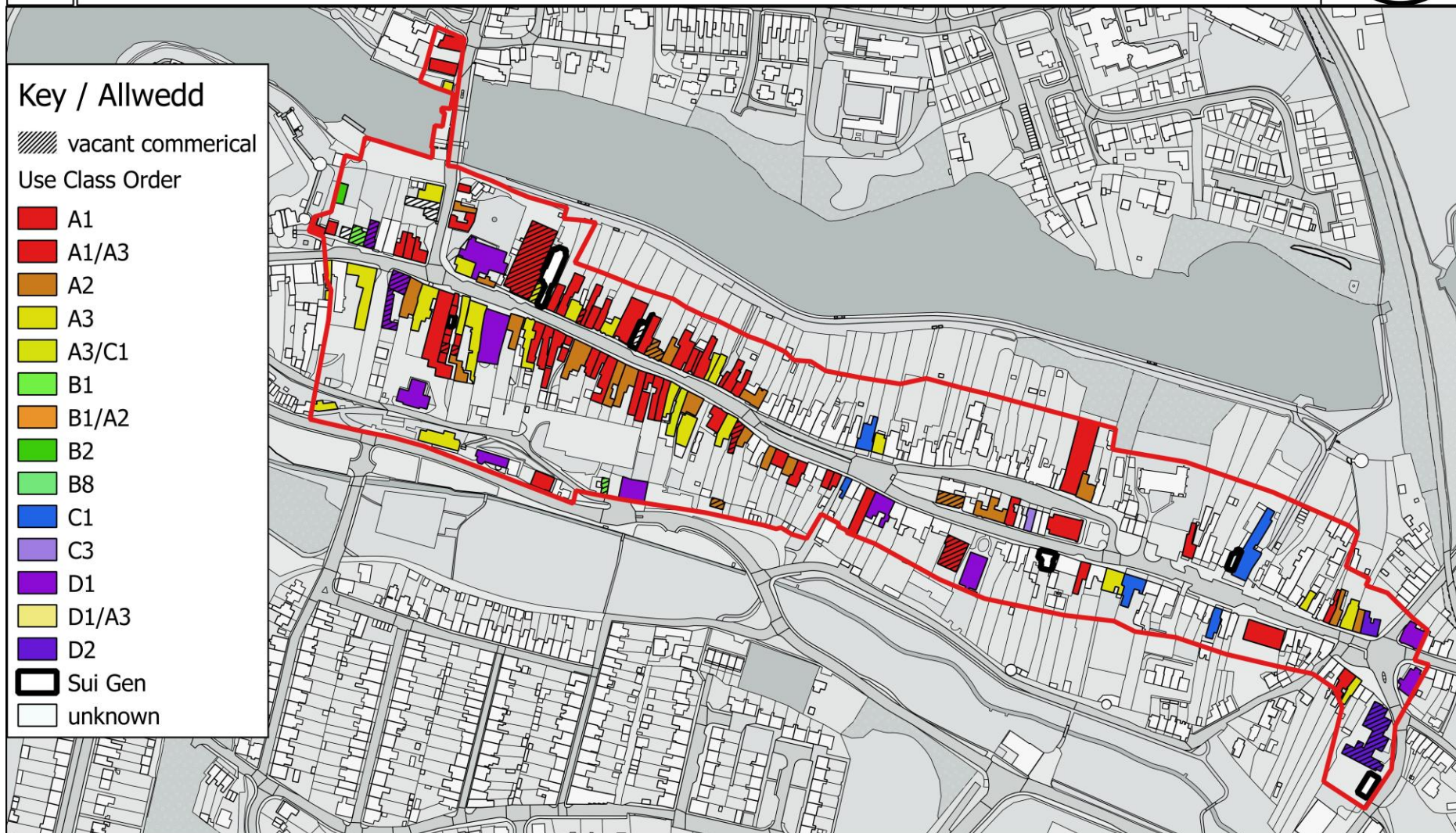


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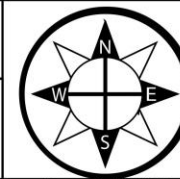
vacant commercial

Use Class Order

- A1
- A1/A3
- A2
- A3
- A3/C1
- B1
- B1/A2
- B2
- B8
- C1
- C3
- D1
- D1/A3
- D2
- Sui Gen
- unknown



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### Key / Allwedd

vacant commercial

Use Class Order

A1

A1/A3

A2

A3

A3/C1

B1

B1/A2

B2

B8

C1

C3

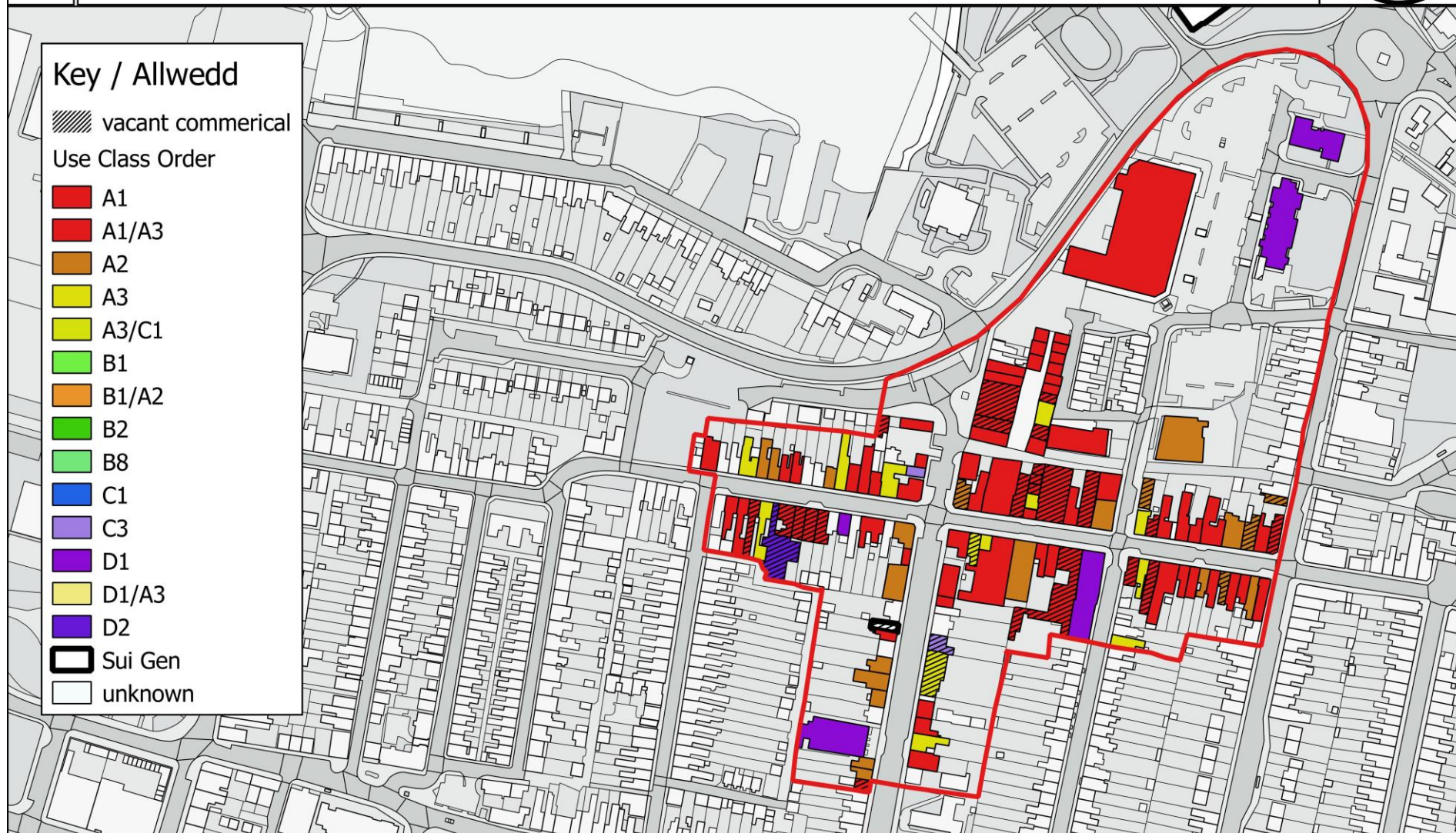
D1

D1/A3

D2

Sui Gen

unknown



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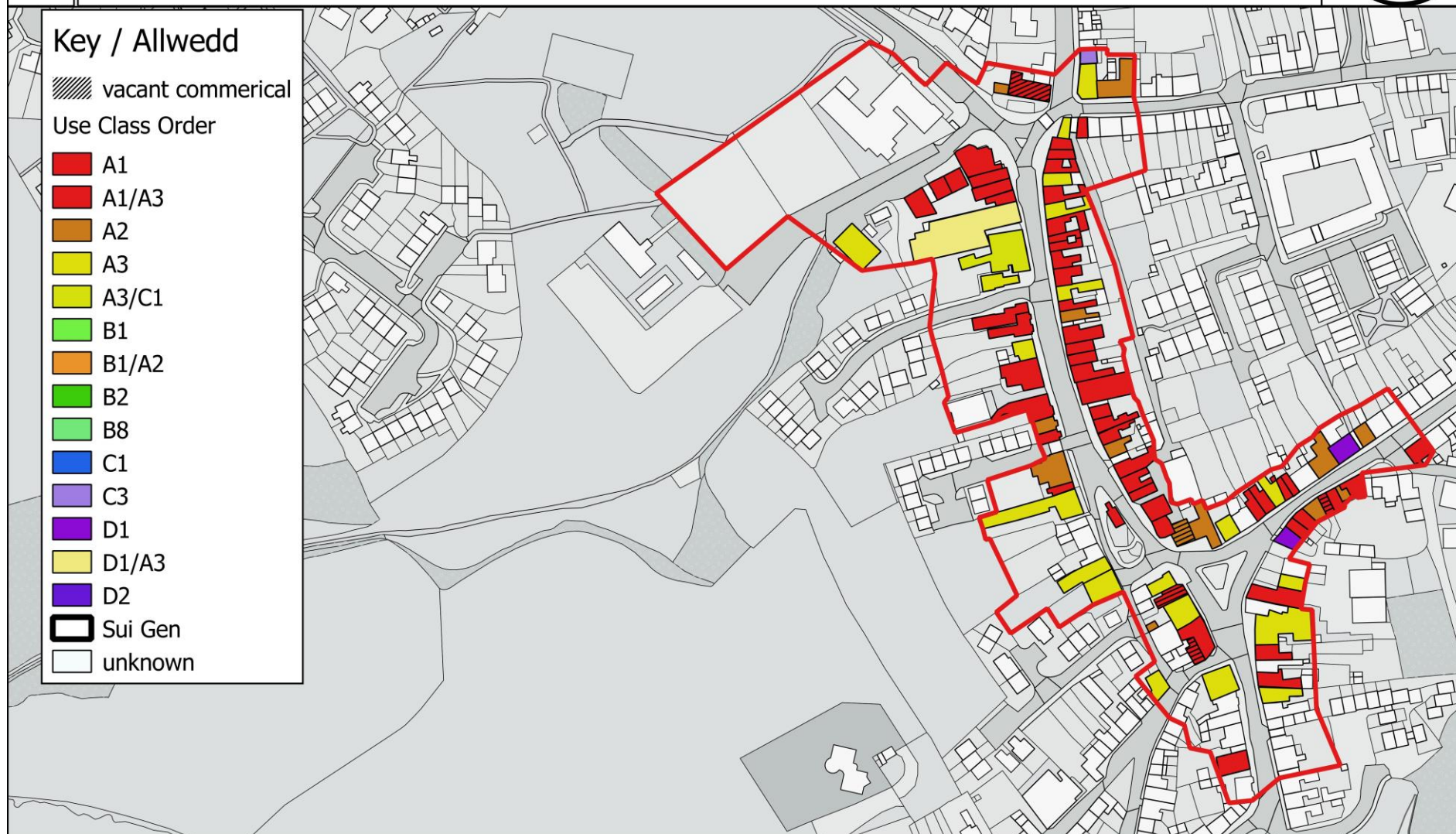


## Key / Allwedd

vacant commerical

Use Class Order

- A1
- A1/A3
- A2
- A3
- A3/C1
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- B1/A2
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- B8
- C1
- C3
- D1
- D1/A3
- D2
- Sui Gen
- unknown



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