



Pembrokeshire County Council

Retail Survey Data

March 2019 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 2019. 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 2018)

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.¹

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 two Town Centre areas - Milford Haven marina , and Narberth . The vacancy of A class uses has fallen within Milford Haven town centre, Pembroke Dock, Pembroke Haverfordwest and Fishguard town centres. Vacancy rates remain above UK national average² except at Pembroke and Narberth.
13. The former Riverside Market at Haverfordwest has been redeveloped as Glan Yr Afon and comprises a library, café and art gallery (classified as a single D1 use class) recorded as a single unit. The vacancy of A units at Haverfordwest town centre remains constant.
14. Vacancy rates in Haverfordwest, Pembroke Dock, Milford Haven (town centre and marina) and Fishguard remain above the National Average. Vacancy rates in Pembroke and Narberth remain 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 remain consistent with previous surveys The number of charity shops has continued to increase since 2016 and is now above 2014 levels.

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

² Vacancy rate 11.1% for town centres, UK average first half of 2018.

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 2019

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	45	10	22	2	16	95	17 %	21
Haverfordwest	120	39	25	1	38	223	17%	51
Milford Haven	46	14	20	1	18	99	19 %	19
Milford Marina ³	13	0	7	0	3	23	13%	3
Narberth	52	10	20	2	8	92	9%	8
Pembroke	57	18	22	2	9	108	9%	19
Pembroke Dock	55	16	13	0	28	112	25 %	29
Tenby	No break down available				12	179	7	No breakdown available
Saundersfoot					1	63	2	
St Davids					3	62	5	
Solva					0	13	0	
Newport					1	30	3	

Note: Data is for ground floor units only.

UK Town Centre National Average Vacancy rate: 12.4% in 2018 (Source Local Data Company). Wales' vacancy rate for Town Centres was 14.8% % in 2018

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	7146	939	3188	404	2162	13841
Haverfordwest	22363	5583	3812	141	5025	36925
Milford Haven	5683	2226	3056	215	2194	13375
Milford Marina	1030	0	665	0	120	1875
Narberth	4770	691	2573	1034	708	9778
Pembroke	8432	2679	3969	360	1851	17293
Pembroke Dock	10845	2540	1510	0	3098	17994
Tenby	Data not available				1802	21280
Saundersfoot					71	6584
St Davids					260	7514
Solva					0	1510
Newport					133	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
2019 Comparison (occupied)	32	91	31	9	39	33	37
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
2019 convenience (occupied)	4	3	2	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
2019 Service (occupied)	43	91	46	11	40	59	41
2014 Comparison/Service (occupied)	0	0	0	0	1	2	0
2016 Comparison/Service (occupied)	0	0	1	0	1	1	0
2017 Comparison / Service (occupied)	0	0	1	0	1	1	0
2018 Comparison / Service (occupied)	0	0	1	0	0	0	0
2019 Comparison / Service (occupied)	0	0	1	0	0	1	0

	Fishguard	Haverfordwest	Milford Haven	Milford Marina	Narberth	Pembroke	Pembroke Dock
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
2019 Unknown (occupied)⁴	0	0	0	0	0	0	0
2014 Vacant	9	42	21	0	2	7	17
2016 Vacant	16	45	18	1	2	8	21
2017 Vacant	15	62 ⁵	18	4	5	13	24
2018 Vacant	19	38 ⁶	23	2	5	9	28
2019 Vacant	16	38	18	3	8	9	28
2014 Total A class	95	244	101	19	91	109	111
2016 Total A class	100	250	101	19	90	113	111
2017 Total A class	98	246	102	22	89	110	110
2018 Total A class	98	225	106	22	90	108	111
2019 Total A class	93	223	98	23	90	107	112

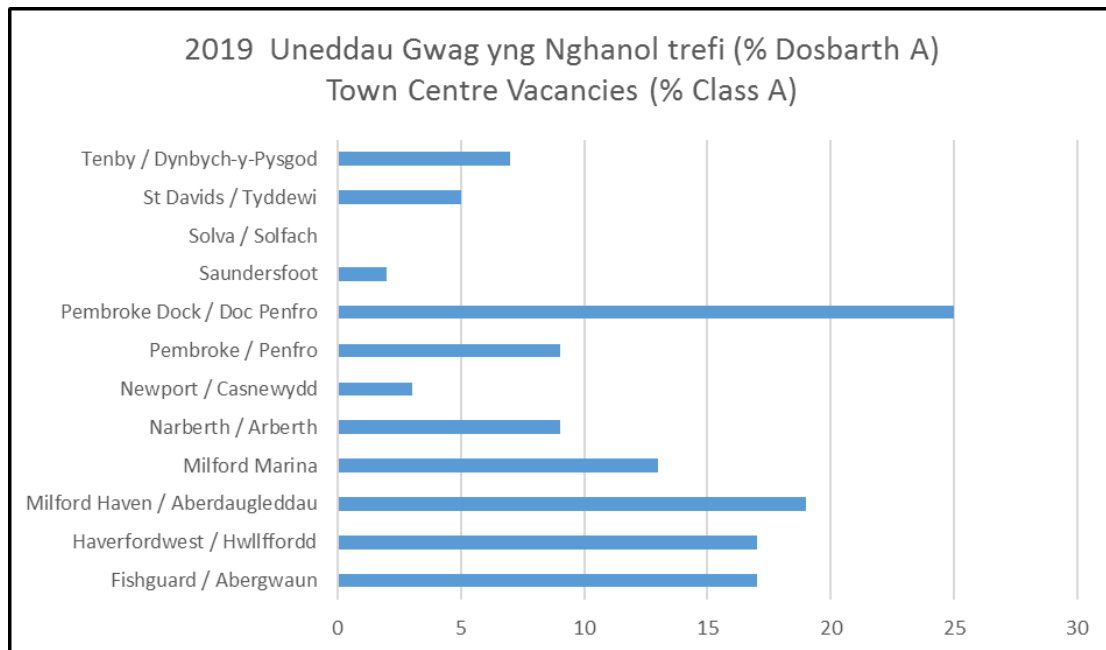
⁴ Includes individual Riverside Market units

⁵ Former Riverside Market is a single unit.

B. Floorspace (sq m)

Town	Comparison Floorspace (occupied)	Convenience Floorspace (occupied)	Service Floorspace (occupied)	Comparison/Service Floorspace (occupied)		Vacant	Total
Fishguard	5317	1510	5010	00		2162	13999
Haverfordwest	18475	829	12596	0		5025	36925
Milford Haven	4028	697	6210	29		2194	13160
Milford Marina	724	0	971	0		179	1875
Narberth	3395	627	4012	0		708	8743
Pembroke	4942	1001	9138	163		1851	17098
Pembroke Dock	5839	3860	5196	0		3098	17994

2.4 Graph illustrating A Class Vacancy Rates for 2019



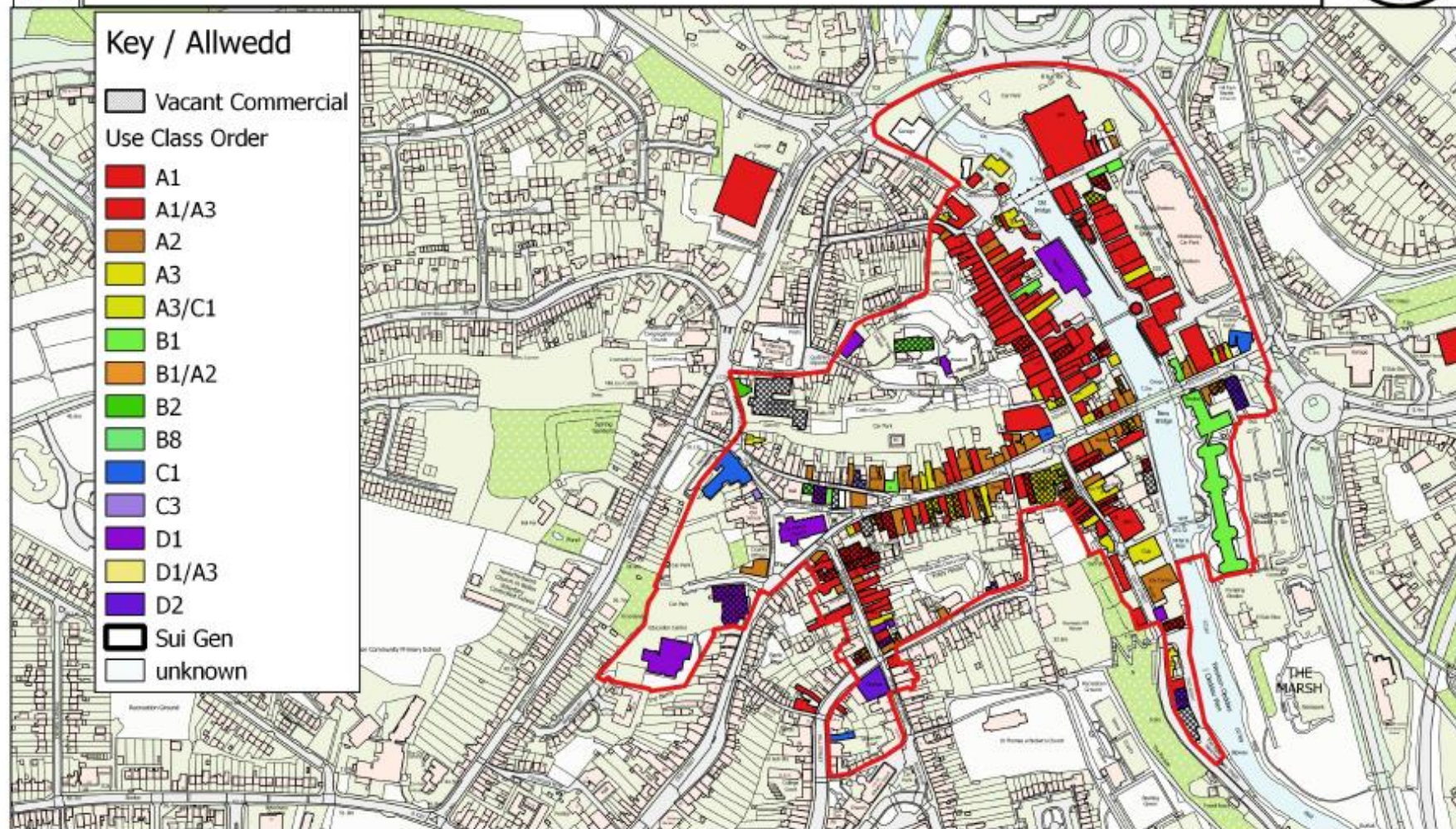
2.5 Changes in betting shops between 2009 and 2019 (only occupied units shown)

Betting shops Total Numbers									
Town	2009	2011	2012	2013	2014	2016	2017	2018 ⁷	2019
Fishguard	1	1	1	1	1	1	1	1	1
Haverfordwest	2	2	2	2	2	3	3	3	3
Milford Haven	2	2	3	3	3	3	3	3	3
Narberth	0	0	1	2	1	1	1	1	1
Pembroke	1	1	1	2	2	2	1	1	2
Pembroke Dock	0	1	1	2	2	3	2	2	2
Total	6	7	9	12	11	13	11	11	11
Newport	0	0	0	0	0	0	0	0	N/A
Saundersfoot	0	-	0	0	0	0	0	0	N/A
Solva	0	-	-	0	0	0	0	0	N/A
St Davids	0	-	0	0	0	0	0	0	N/A
Tenby	2	2	2	3	3	2	2	2	N/A
Total	2	2	2	3	3	2	2	2	N/A
Grand Total	8	9	11	15	14	15	13	13	N/A

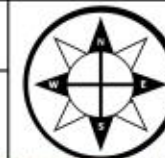
2.6 Changes in charity shops between 2009 and 2019 (only occupied units shown)

Charity shops									
Town	2009	2011	2012	2013	2014	2016	2017	2018	2019
Fishguard	1	2	3	3	3	2	4	4	4
Haverfordwest	8	9	9	11	12	11	11	11	11
Milford Haven	3	3	3	4	4	3	3	4	7
Narberth	0	3	3	3	3	3	2	3	3
Pembroke	4	4	4	4	4	4	4	4	4
Pembroke Dock	1	0	1	7	7	5	5	4	6
Total	17	21	23	32	33	28	29	30	35
Newport	-	-	0	0	0	0	0	0	N/A
Saundersfoot	0	-	0	0	0	0	0	0	N/A
Solva	-	-	-	0	0	0	0	0	N/A
St Davids	1	1	1	1	1	1	1	1	N/A
Tenby	5	6	6	4	4	4	3	4	N/A
Total	6	7	7	5	5	5	4	5	N/A
Grand Total	23	28	30	37	38	33	33	35	N/A

3. Town Centre Maps (see Appendices)



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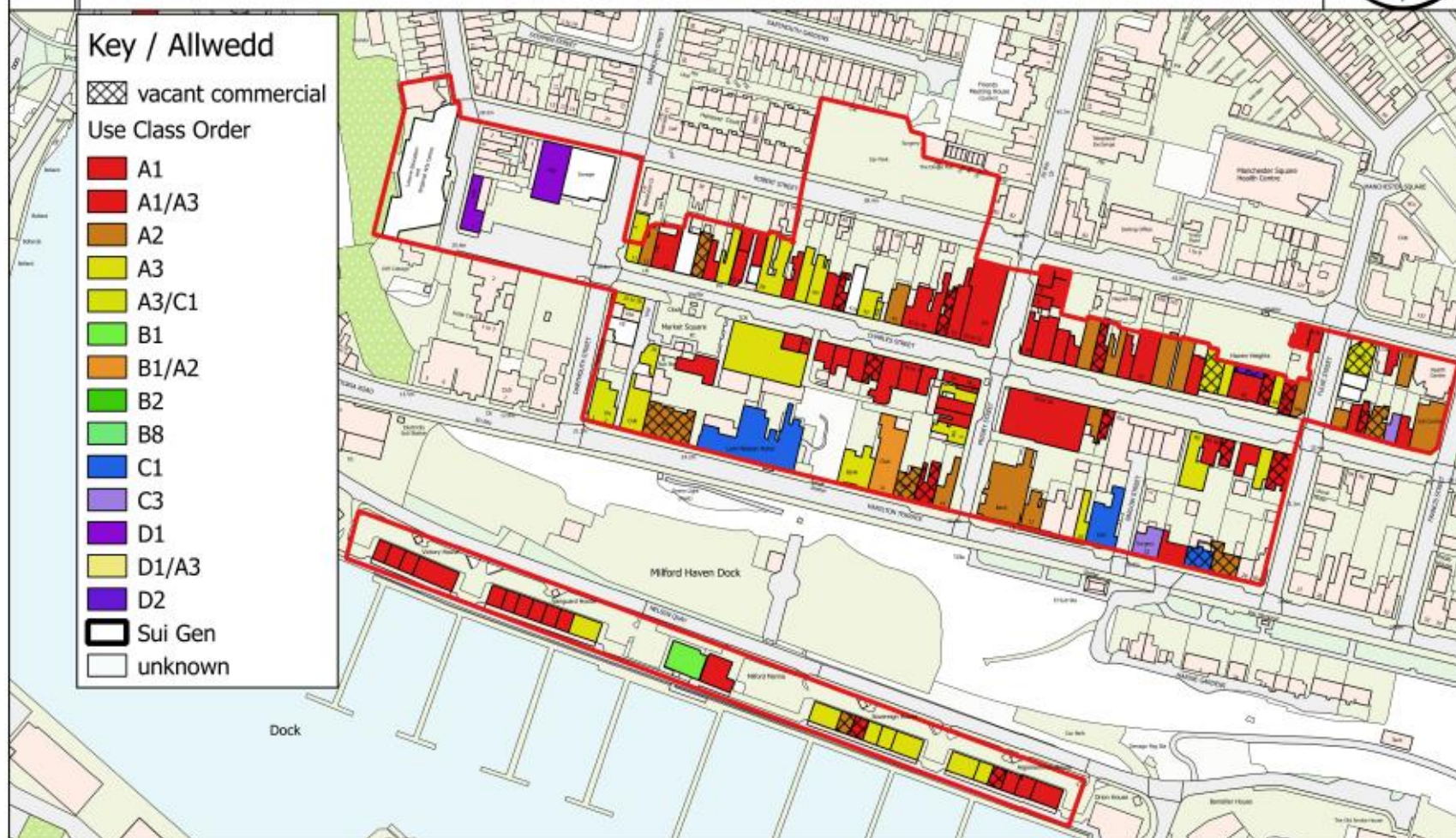


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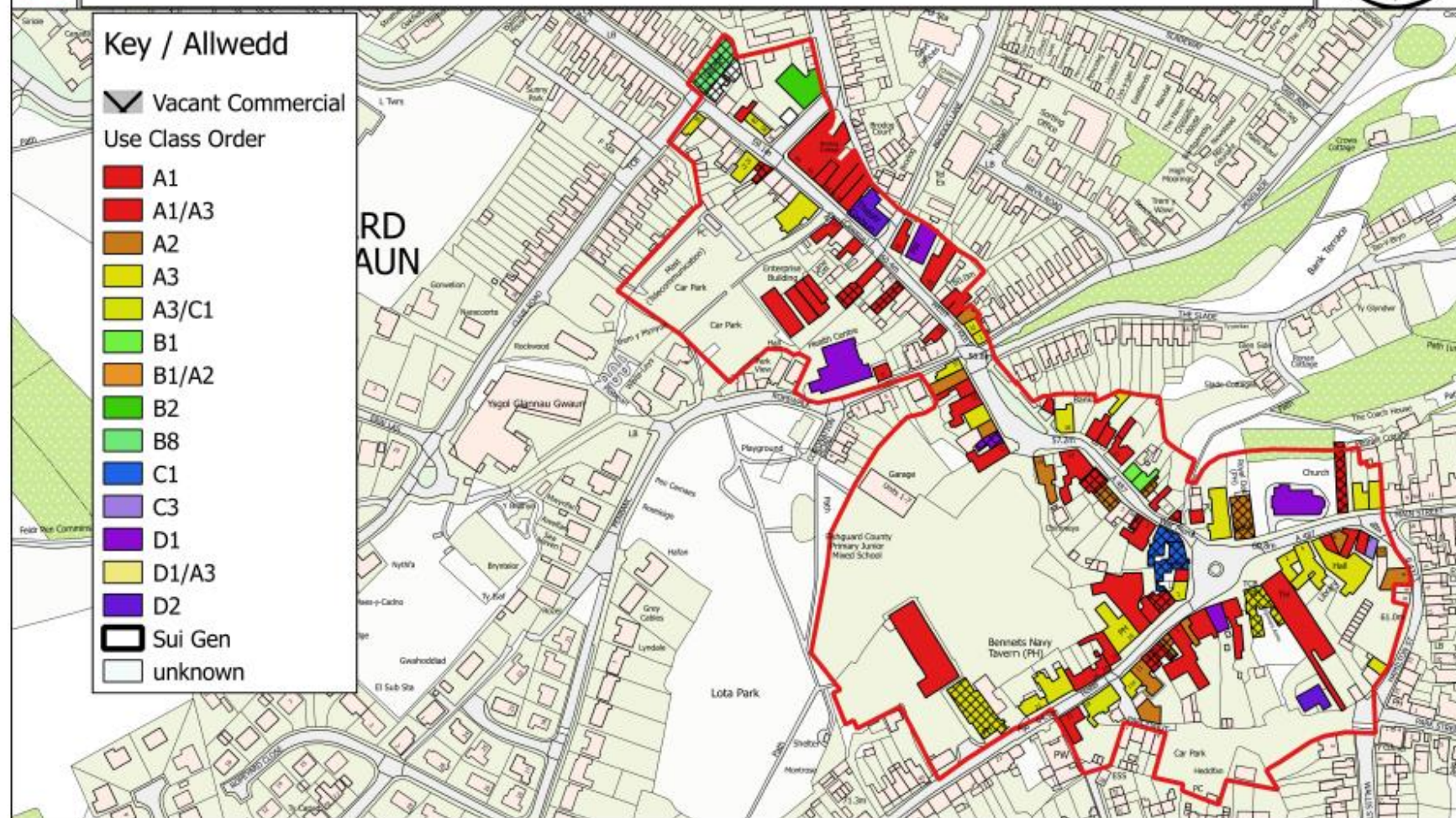
vacant commercial

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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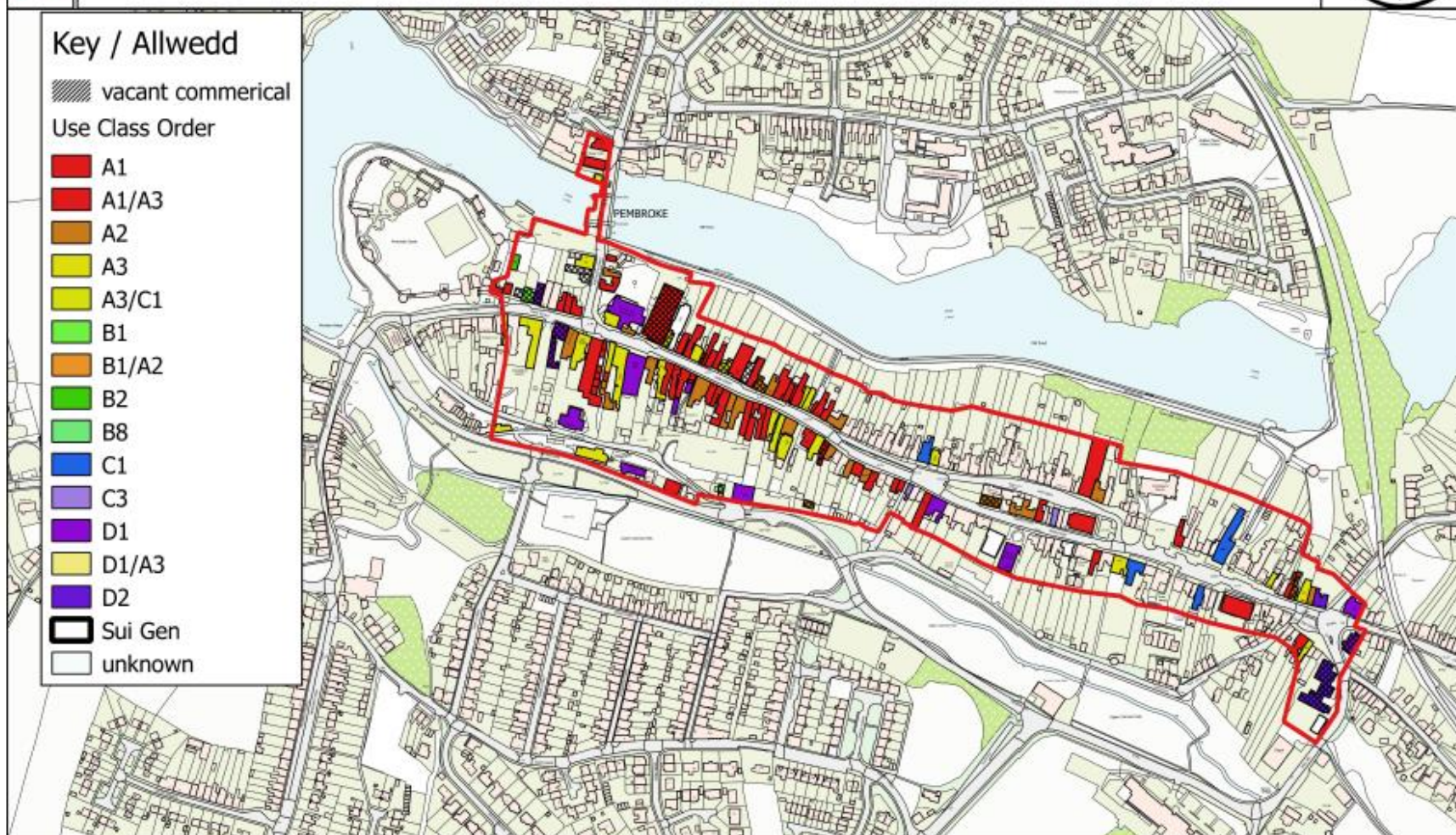


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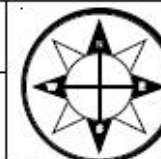
vacant commercial

Use Class Order

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- D2
- Sui Gen
- unknown



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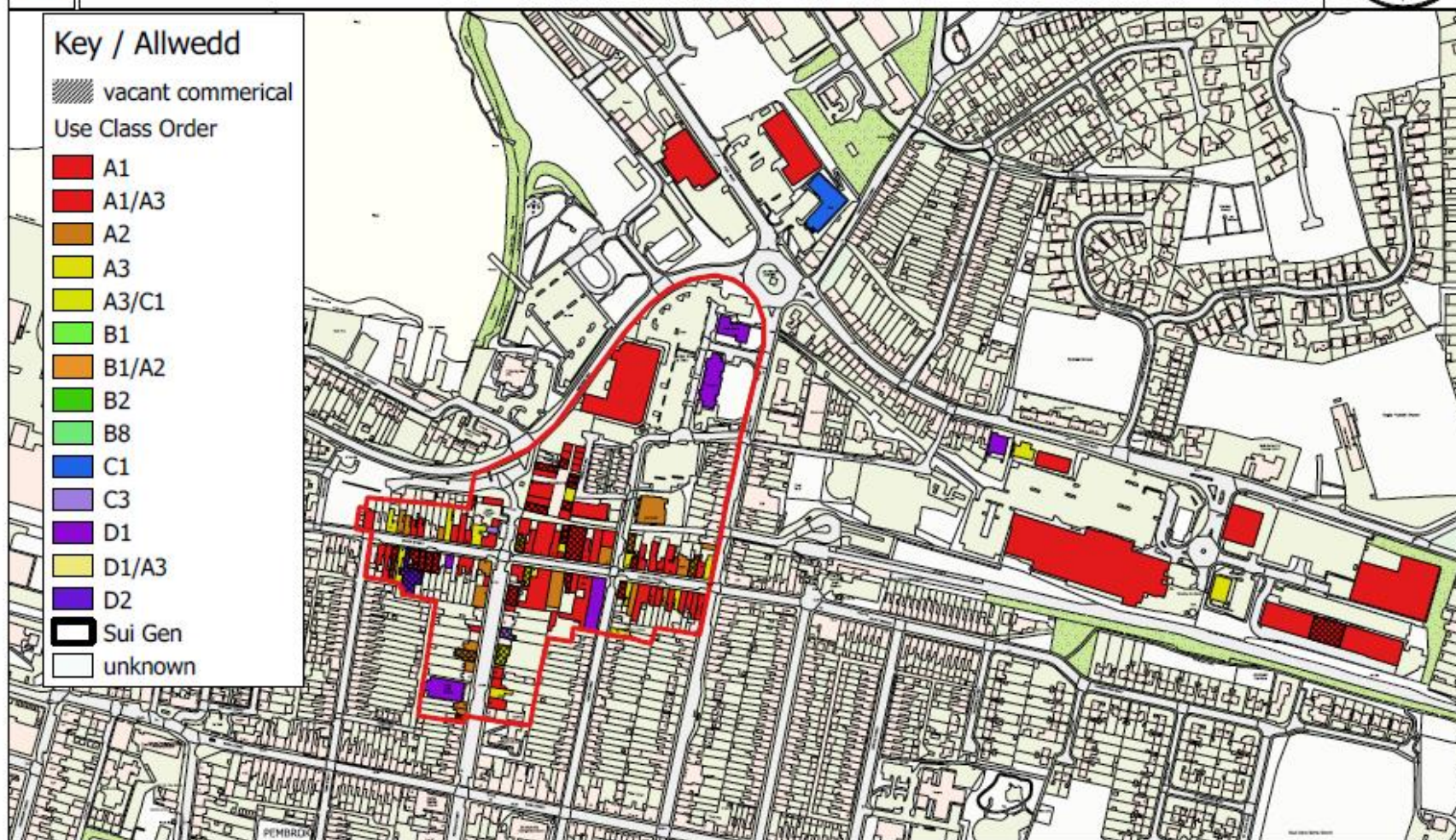


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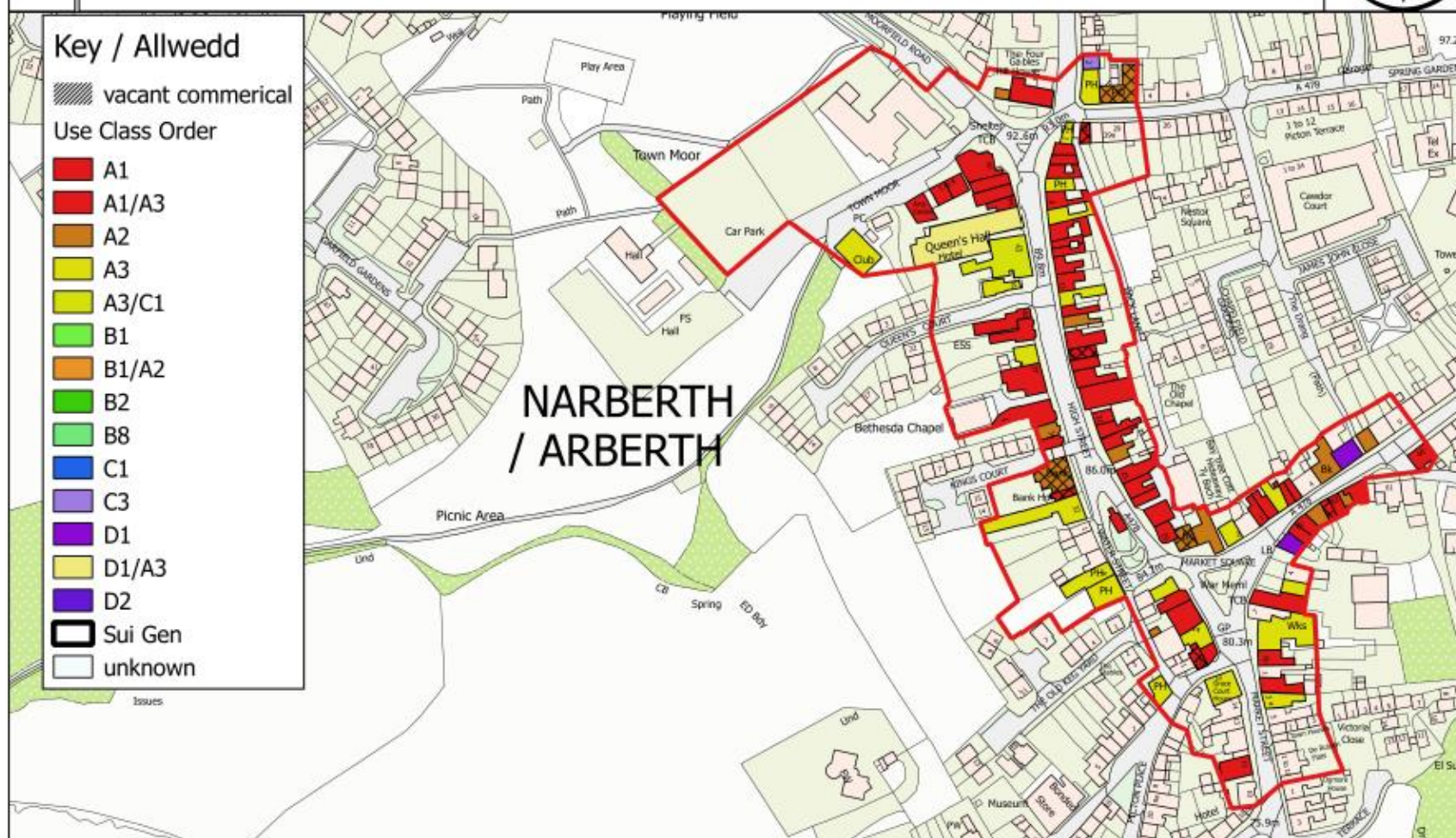


Key / Allwedd

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