Urban Settlements Report

Development Plans

**September 2019 with minor updates July 2024**

Contents

1. Introduction

1.1 A study of the availability of Services and Facilities in Pembrokeshire's Urban Settlements, identified in the LDP Preferred Strategy (December 2018), is an important part of the evidence base for the development of LDP 2. Understanding the levels of services and facilities provides a clear understanding of the way in which the towns of Pembrokeshire function in order to identify strategies and locations for housing and other development during the life of the Plan.

1.2 According to Future Wales (February 2021) Policy 29, the Welsh Government "*supports sustainable growth and regeneration in Carmarthen and the Pembrokeshire Haven Towns (Haverfordwest, Milford Haven, Pembroke and Pembroke Dock)". These places "have important sub-regional roles. Development in these towns will ensure they continue to provide jobs, leisure, retail and cultural opportunities, education and health services and connectivity infrastructure that is used and relied on by both their own populations and communities around them. It is important that these settlements maintain their regional role and Strategic and Local Development Plans adopt a managed growth approach that allows their roles to be enhanced.*" This clearly underlines the need for a strong and robustly evidenced settlement hierarchy.

1.3 Diagram 14 in paragraph 5.15 of the LDP manual (March 2020) requires Planning Authorities to "*….formulate a methodology for assessing the role and function of settlements…*" and that this should be set out in the evidence base. The document sets out a need for the assessment of settlements to be transparent, and consistent in approach. It is important that the key components for assessments are included. The importance of balancing social, economic and environmental needs as a consideration in strategic placemaking and in the creation of strong, resilient communities is raised in Planning Policy Wales (February 2024). This document provides appropriate evidence in this context.

1.4 This report presents the results of the 2019 town survey. The precise settlement strategy that will be used in the adopted version of LDP 2 will depend on the outcome of a further public consultation, however, for the purposes of information, this document illustrates a town hierarchy in Appendix 1.

2. Methodology

2.1 The methodology used for the 2019 towns survey reflects that used in the 2019 rural settlement survey in that it considers a range of services and facilities such as shops, community halls, GP surgeries etc., with amendments to the recording of data to reflect the urban area, i.e. looking at the number of each facilities rather than just whether one or more may be present.

2.2 The towns to be assessed in this survey are those identified in Future Wales as The Haven Towns, namely Haverfordwest, Milford Haven, Pembroke and Pembroke Dock (WG, February 2021).The survey will also rank the other urban settlements of Fishguard and Goodwick, Neyland and Narberth. In order to undertake a consistent assessment a 400m buffer was applied on LDP 1 settlement boundaries, with the following amendments:
- Pembroke Dock - Pennar is included in any figures, and any overlap with Pembroke is removed from the assessment by using the Town Council area.
- Pembroke - any overlap with Pembroke Dock is removed from the assessment by using the Town Council area.
- Neyland – the settlements of Barnlake, Mascle Bridge, Little Honeyborough and Llanstadwell are removed from the assessment as these villages/hamlets are recognised as individual settlements lower in the settlement hierarchy (see 2019 Rural Facilities Report).
- Milford Haven – the settlements of Thornton and Liddeston are removed as these are recognised as individual settlements/hamlets lower in the settlement hierarchy (see 2019 Rural Facilities Report).
- Fishguard - any overlap with Goodwick is removed from the assessment by using the Town Council area.
- Goodwick - any overlap with Fishguard is removed from the assessment by using the Town Council area.

2.3 The survey categorises settlements on the basis of a colour coded system evaluating services and facilities and the number of such facilities in urban areas and ranking them accordingly from red (best performing) to white (least best performing). The survey considered the following facilities and services:
- Total number of A Class Units in the town centre (based on 2019 Retail Survey & the 2017 Local Centres Survey results where 2019 data was not available)
- % Vacancy rate of A Class Units within the town centre (based on 2019 Retail Survey & the 2017 Local Centres Survey results where 2019 data was not available)
- Total number of Secondary Schools
- Total number of Infant/Primary Schools
- Area of Strategic Employment Site allocation LDP 1 (Ha)
- % All occupied employment sites (based on 2019 Employment Land Survey results)

- % All vacant employment sites (based on 2019 Employment Land Survey results)
- Total number of Port or Marina related developments
- Total number of Community Halls/Meeting Places
- Bus services – based on total number of routes per day
- Daily train service – based on total number of weekday daily services
- Total number of post offices
- Total number of crèche/playgroup facilities
- Hospital – yes (1point) or no (0 point)
- Total number of GP surgeries
- Total number of Dentists
- Total number of Opticians
- Total number of Pharmacies
- Total number of Public Houses/Clubs
- Total number of children's play areas (No. & their area in Ha)
- National Cycle Network within 400m – yes (1point) or no (0 point)
- PCC Shared use path within 400m – yes (1point) or no (0 point)
- Village Green (No. & area in Ha)
- Common Land (No. & area in Ha)
- Permanent Library – yes (1point) or no (0 point)

2.4 The scoring system was non-scientific and relied on human observations and opinions, and which may not always be 100% accurate, although every effort has been made to double-check data enables the Authority to identify which are the most sustainable and well-serviced towns. This is combined with population data for each settlement, based on the 2017 Census Data, to create a colour coded Urban Settlement Hierarchy as illustrated below.
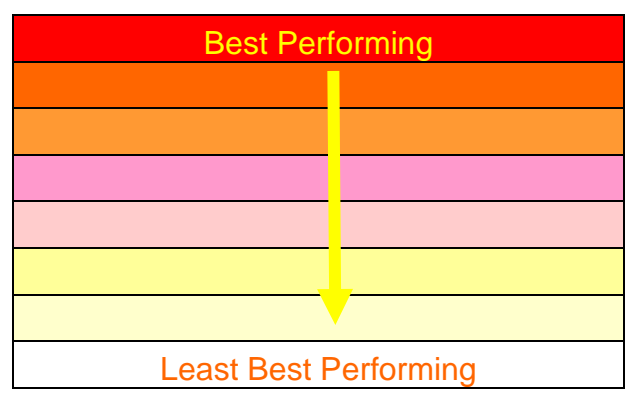
3. Data Analysis

Settlement Hierarchy

3.1 The maps on the following page show the distribution of settlements in the areas of Pembrokeshire under PCC's planning jurisdiction. It illustrates the main towns categorised as Regional Growth Areas and other urban settlements, and the main road transport routes within the County which connect them. The map also identifies the settlements identified as Service Centres, Service Villages and Local Villages based on the amended settlement hierarchy for the Re-Deposit consultation in 2024.

LDP2 Settlement Hierarchy

Scale (A4 Print)

1:350,000

Legend

✈ Airport
△ Ferry Terminal
▬ ▬ Ferry Route
— Main Roads
— Bus Routes
⊢⊢ Passenger Railway
● RailwayStation
▢ HavenEnterpriseZone

Settlement Hierarchy

● Main Town
● Service Centre
○ Service Village
● Cluster Local Village
○ Local Village

Local Planning Authority Boundary

Pembrokeshire County Council Planning Area
Pembrokeshire Coast National Park

St Dogmaels
Cilgerran
Eglwyswrw
Boncath
Blaenffos
Goodwick
Fishguard
Crymych
Scleddau
Tegryn
Hermon
Mathry
Square and Compass
Letterston
Puncheston
Croesgoch
Maenclochog
Wolfscastle
Spittal
Llandissilio
Roch
Clarbeston Road
Llanddewi Velfrey
Simpson Cross
Clunderwen
Keeston
Crundale
Haverfordwest
Robeston Wathen
Narberth
Tavernspite
Tiers Cross
Freystrop
Hook
Templeton
Llanteg
Johnston
Llangwm
Llanteglos
Rosemarket
Hill Mountain
Begelly
Kilgetty
Houghton
Jeffreyston
Broadmoor
Summerhill
Milford Haven
Neyland
Pentlepoir
Llanstadwell
Carew
New Hedges
Cosheston
Pembroke Dock
Miltongeston
St Florence
Hundleton
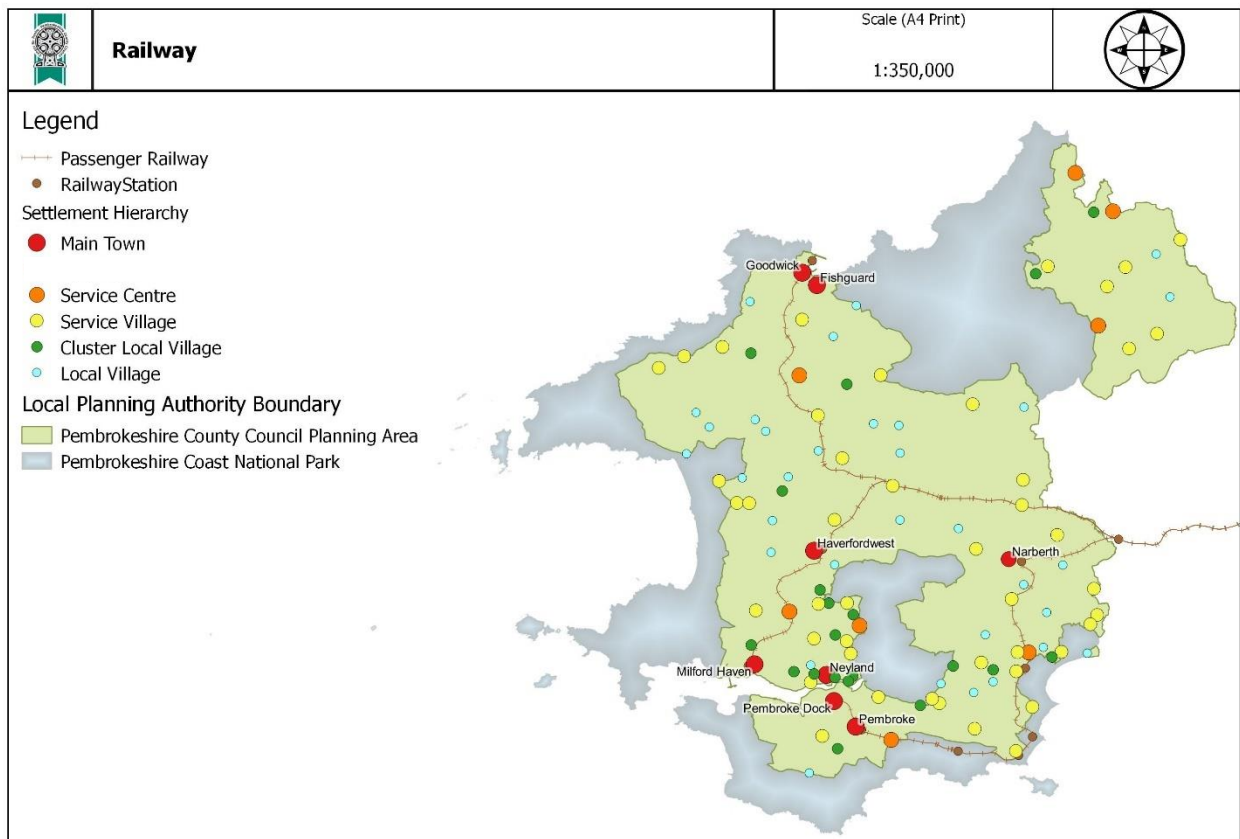Pembroke
Penally
Lamphey

Transport and Utilities analysis

<u>Rail connectivity</u>

3.2 The presence of a train station is an important facility for connecting Pembrokeshire's settlements and provides regular access to locations outside the County for business and leisure. Mid and South Pembrokeshire has a superior rail service in comparison to the North of the County, with two-hourly services to all stations to and from Milford Haven and Pembroke Dock. The service frequency to/from Fishguard/Goodwick was improved in 2012 and a new station has opened in Fishguard Harbour with trains timetabled to meet the twice-daily Fishguard – Rosslare ferry service, plus several other services during the day. This data is reflected in the town data in Appendix 1 at the end of this report.
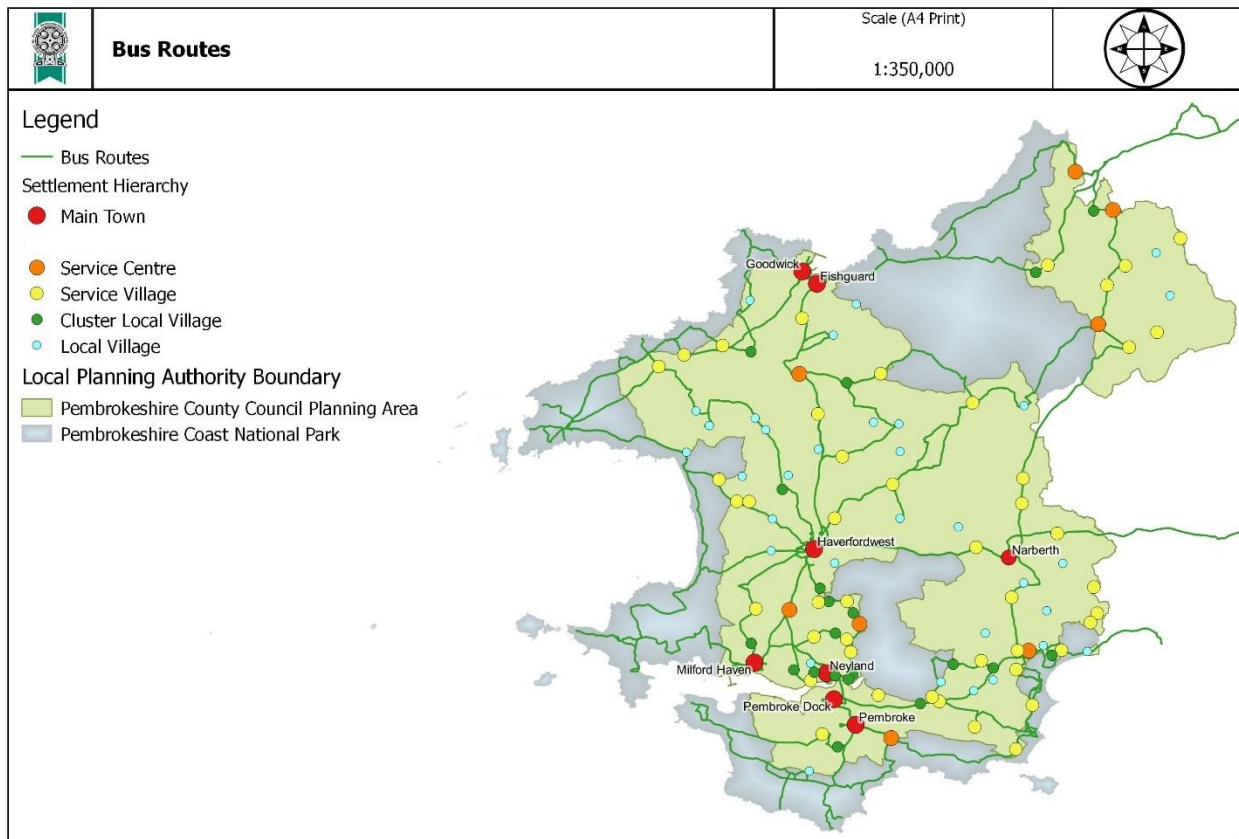
3.3 The map below illustrates the rail network and connectivity of Pembrokeshire.

Bus services

3.4 The map below shows the routes of all bus services within Pembrokeshire and how well connected the towns and settlements higher in the hierarchy are. This data is reflected in the town data in Appendix 1 at the end of this report.

4. The Towns Settlement Hierarchy

4.1 Appendix 1 sets out where different towns in Pembrokeshire would sit within a hierarchy.

4.2 The report clearly illustrates that the County Town of Haverfordwest is the main hub of activity in the County, followed closely by Milford Haven. Both of these towns have large populations but Haverfordwest benefits from a more active retail environment. It is also served by Withybush General Hospital, benefits from the Pembrokeshire Further Education Collage as well as Haverfordwest High School, is in close proximity to Withybush Airport, and has the highest concentration of GP practices, pharmacies, dentists, and opticians when compared to other urban settlements.

4.3 Retail activity and unit vacancy can give an indication of the vibrancy of a town centre. Haverfordwest clearly has the highest number of A Class units, followed by Pembroke, Pembroke Dock and Narberth. Goodwick performs best in terms of the lowest number of vacancies in the town centre, however this is caveated by the fact that it only has 12 A class units in its centre, in comparison to 185 in Haverfordwest. After Goodwick, Narberth and Pembroke have the fewest vacant units, indicating that these centres are performing well. Pembroke Dock has the greatest number of vacancies in terms of A class units within its town centre[1].

4.4 Looking at the distribution of employment sites these are concentrated around the Haven Waterway, with a number of major industrial sites and strategic employment allocations located here. This area also forms part of the Haven Waterway Enterprise Zone with strategic sites at Blackbridge (Milford Haven), Pembroke Science and Technology Park and Waterloo Industrial Estate (Pembroke Dock). The Haven area generally performs best in terms of occupancy of employment sites. The towns of Fishguard and Goodwick perform less well in terms of uptake of employment land, however there is a large strategic employment site at Trecwn (near Fishguard) which also forms part of the Haven Waterway Enterprise Zone. Haverfordwest benefits from a large strategic employment site and a concentration of growth particularly around the Withybush area and its strategic food park. The employment data for Pembroke and Pembroke Dock is combined, however assessment of the employment land report suggests it is concentrated around the Haven and Pembroke Dock area[2].

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[1] For a full breakdown of retails trends in the town centres see the LDP Retail Reports (https://www.pembrokeshire.gov.uk/adopted-local-development-plan/implementation-and-monitoring accessed 16/09/2019)

[2] For a full breakdown of employment land in urban areas see the LDP Employment Survey Reports (https://www.pembrokeshire.gov.uk/adopted-local-development-plan/implementation-and-monitoring accessed 16/09/2019)

4.5 When analysing travel options Milford Haven and Haverfordwest perform best in terms of train accessibility, but Haverfordwest is far superior in that it has greater bus connectivity. Fishguard and Pembroke Dock also benefit from more bus routes than Milford Haven, but Milford Haven has a more frequent train service. The road network connecting towns to their wider hinterland is good throughout the County. In terms of ferry travel there is a strategic port at Goodwick (known as Fishguard Harbour) which serves the whole of north Pembrokeshire and much of Ceredigion with passenger and freight travel to Ireland, as well as being a cruise ship terminal. This area is also part of the Trans European Road Network. Furthermore in terms of ferry travel, Pembroke Dock similarly benefits from a ferry terminal which serves as a key connection between Ireland and south Wales. Both ferry terminals are considered to be of regional, national and international importance as they connect Wales with Europe. The strategic port of Milford Haven is also significant. Known as the UKs largest energy port it serves a wide variety of industries as well as serving as a cruise ship terminal. All towns benefit from the National Cycle Network and PCC Shared Use Path access.

4.6 Community facilities such as halls, schools, play areas, crèche facilities, public houses and access to open space such as village greens, etc. are best in Haverfordwest, followed generally by Milford Haven. Goodwick performs least well in terms of general community facilities and is the only town without a permanent library. Its close proximity to Fishguard means however that a library can be accessed there, along with other facilities such as the doctor's surgery, dentists and secondary school. Neyland and Narberth also perform less well in terms of general community facilities, however this is to be expected given the lower population numbers in these towns. In locations where there are fewer village green designations there are more common land designations.

5. Conclusions

5.1 This report sets out information on the level of services within the towns of Haverfordwest, Milford Haven, Pembroke Dock, Pembroke, Fishguard, Goodwick, Neyland and Narberth. It illustrates what a hierarchy would look like based primarily on the availability of a range of key services and facilities in each town and clearly shows the County Town of Haverfordwest performing best. The hierarchy crudely ranks the towns of Pembrokeshire, outside of the National Park, as follows:

> Haverfordwest
> Milford Haven
> Pembroke Dock
> Pembroke
> Fishguard
> Neyland
> Narberth
> Goodwick

5.2 Analysis of the hierarchy of towns however shows a complementarity where some benefit from more employment provision, whilst others are stronger in community facilities, and their interconnected nature is complemented by the choice of transport options. A clear example of this complementarity is Fishguard and Goodwick which share many of their resources and facilities including their doctor's surgery, dentists, the secondary school and also employment sites and port facilities. Pembroke and Pembroke Dock similarly have a close connection, sharing a secondary school as well as facilities such as the cottage hospital and employment opportunities. When analysing options for future growth therefore the complementarity and proximity to other towns must be acknowledged.

Settlements	Population*	Total No. A class units in town centre**	Vacancy rate A class units within town centre (%)**	Number Secondary School(s) January 2019	Number Infant / Primary School(s) January 2019	Strategic Employment Site allocation LDP 1 (Ha)****	Occupied Employment Sites 2019 (%)	Vacant Employment Sites 2019 (%)	Port/Marina Development	Community Hall / Meeting Place(s)	Bus Services	Daily Train Service	Post Office(s)	Crèche / Playgroup	Hospital	GP Surgery(s)	Dentist Surgery(s)	Optician(s)	Pharmacy(s)	Public House / Club(s)	Children's Playground / sports area(s) (No. & area in Ha)#	National Cycle Network / Route (within 400m)	PCC Shared Use Path (within 400m)	Village Green (No. designations & area)	Common Land (No. designations & area)	Permanent Library	Rank
Haverfordwest (incl Merlins Bridge)	15,769	185	17	1	6	20.61	43.8%	56.2%		14	12	11	3	6	1	2	4	5	5	30	20	1	1	3 (86.647 acres)		1	1
Milford Haven	14,146	81	19***	1	3	33.45	86.5%	10.7%	1	14	4	12	3	4		2	3	3	5	29	30	1	1	3 (1.802 acres)		1	2
Pembroke Dock	10,026	84	25		2	22.38			1	7	5	9	2	1	1	1	2	3	3	25	23	1	1	1 (3.557 acres)		1	3
Pembroke	7,964	99	9	1	2		93.7%	6.2%		6	3	9	2	2		1	1		2	15	12	1	1	2 (10.899 acres)		1	4
Fishguard	3,364	79	17	1	2					7	5		1	1		1	2	1	2	15	4	1	1		1 (0.167 acres)	1	5
Goodwick	2,043	12	0		1	21.11	17%	74.6%	1	2	3	6	1	1					1	4	5	1	1		1 (0.252 acres)		8
Neyland	3,392	22	10		1		50.9%	47.5%	1	6	3		1			1		1	1	9	5	1	1		1 (2.12 acres)	1	6
Narberth	2,339	84	9		1		62.8%	18.4%		3	3	9	1	1		1	2	2	2	8	7	0	1	1 (10.142 acres)	1 (0.310 acres)	1	7

NOTE: All data correct as of May 2019 unless alternative date given.

* Population estimated for 2017 using LLPG copy from mid 2017 and 2017 Mid-year estimate by technique as stated in the attached method statement using areas defined by Settlement boundaries defined in the LDP adopted 28/02/2013.

** Data taken from March 2019 Retail Survey, except for the local centres of Goodwick & Neyland where they are taken from 2017 data.

*** Milford Haven Marina vacancy = 13% not included in the town centre figure

**** Withybush Strategic Site recorded under Haverfordwest & Trecwn Strategic Site recorded under Fishguard/Goodwick (approx 4.5miles)

using LLPG Address = "TERTIARY_DESCRIPTION" = 'Playground' OR "TERTIARY_DESCRIPTION" = 'Indoor / Outdoor Leisure / Sporting Activity/ Centre' OR "TERTIARY_DESCRIPTION" = 'Public Park / Garden'