# Pembrokeshire Coast National Park

**Management Plan (2015-2019)**
**Local Development Plan 2**
**(end date 2031)**

**Background Paper: Retail**

**March 2018**

**PEMBROKESHIRE COAST NATIONAL PARK AUTHORITY**

## Contents

## National, Regional and Local

### National

## Planning Policy Wales, Edition 9, November 2016

### Chapter 4 – Planning for Sustainability and Chapter 7 – Economic Development

1. Both chapters promote mixed use development within settlements and town centres (Planning Policy Wales 9, 2016, paras 4.6.2, 4.7.6, 7.5.1)

### Chapter 10 – Planning for Retailing and Town Centres

2. Confirms Welsh Government support for existing centres at town, district, local and village centres as well as village shops and other outlets which support the local community. Diversity of uses at centres, at appropriate scales is supported. The sequential test and 'need' for development tests are re-affirmed for development outside centres.

## Technical Advice Note 4: Retail and Commercial Development (2016)

3. This Technical Advice Note comprises of technical advice on the following topic areas:
   - Retailing objectives;
   - Centre hierarchies in conjunction with neighbouring authorities;
   - Retail strategies, masterplans and Place Plans;
   - Retail needs tests;
   - The sequential test;
   - Retail Impact Assessments
   - Retail frontages;
   - Retail Planning Conditions;
   - Mezzanine Floors in retail Development
   - Local Development Orders; and
   - Indicators of Vitality and Viability.

## Technical Advice Note 6: 'Planning for Sustainable Rural Communities' (2010)

4. Paragraph 2.1 states that the overall goal for the planning system is to support living and working rural communities so in order that they are economically, socially and environmentally sustainable. Section 3.8 provides advice in relation to farm shops and states that local authorities, when considering planning applications for farm shops should:

   > "only limit the broad types of produce sold where an unrestricted retail use would result in a significant adverse effect on a village

shop. Where there are no other shops in the locality, planning authorities should support a diversity of retail services, for example a sub post office, to help to meet essential needs of the community." (TAN 6 2010, para 3.8.2)

## Technical Advice Note 7: 'Outdoor Advertisement Control' (1996)

5. Provides guidance for applicants and local planning authorities on considering applications for advertisements.

## Technical Advice Note 12: 'Design' (2016)

6. Provides advice to applicants and local planning authorities on the principles of good design which includes character, access, environmental sustainability, community safety and movement. Other principles included that are relevant to retail areas include the relationship between private and public space and legibility. Within section 5.6 'The Historic Environment' it is stated that:

   "In areas recognised for their landscape, townscape, architectural, archaeological and/or historic value, such as National Parks, … the objective of sustaining character is particularly important and context appraisals should reflect this. The general aspects of the "character" objective of good design should be pursued but more detailed information may be needed in relation to key issues such as:…**in retail areas** distinctive design and proportions of shopfronts, signs, and lettering." (TAN 12 2016 para 5.6.2).

### Permitted Development Rights

7. Recent changes to permitted development rights for shops were introduced in The Town and Country Planning (General Permitted Development) (Amendment) (Wales) Order 2014. However, the changes introduced in Part 42 *'Shops, Financial or Professional Services Establishments'* exclude article 1(5) land. The new rights therefore do not apply to National Parks.

## Wales Spatial Plan

8. Key messages from the Wales Spatial Plan for retailing are

   - Locate new development – especially significant new housing development - in places which are highly accessible by public transport (page 29)
   - It means setting out a clear hierarchy for the location of public facilities so that everyday services are provided locally, whilst less frequently accessed services are provided at major centres, that can be accessed by a choice of means of transport (page 29)
   - Ensure decisions on the location pf major retail development take account of the opportunities provided by integrated transport in the urban networks and consider the impact on neighbouring centres (page 30)

## People, Places, futures: The Wales Spatial Plan 2008 Update

9. The Wales Spatial Plan update is intended to provide a stand alone document, without repeating the detail of the parent document, which provides the basis and context for the update. The update document is to
   - Reflect new drivers of change, including *One Wales* and its key policies
   - Give status to the Area work which has been developed over the past two years

10. With regard to retail development, the Wales Spatial Plan update provides the following:

    "the key challenge, therefore, going forward is to ensure that the area's settlements, and in particular its urban centres, have the scale and catchment areas to sustain the level and quality of retail, leisure and services that will help improve what the area has to offer to both residents and visitors (who can double the population of Pembrokeshire in the peak season) throughout the year/ This is so that, taken together, the settlements can work more effectively that they could if they were competing. Improving the area's communications infrastructure, including facilitating better access to the area's town centres, is not only integral to their future success but essential if we are to enable settlements seeking to develop complementary roles and functions to work together more effectively" (page 140)

## Working Together for Wales, March 2007 – Policy Statement for the National Parks and National Park Authorities in Wales

11. Confirms, that in fulfilling its functions, the National Park Authorities are under a duty to foster the economic and social well being of the communities within their areas.

**Regional**

## Wales Spatial Plan, Pembrokeshire Haven Key Settlement Framework 2021 (draft for Ministerial meeting). [Prepared by the Pembrokeshire Haven Drafting Group].

12. Identifies that key settlements will help to realise the vision of the area. They are recognised as a key resource, underpinning significant areas of economic activity such as tourism. It identifies a hierarchy of settlements, within which each performs a complimentary role in terms of realising the vision, and as such, should not be seen as competitors. Town Centre Renewal interventions are identified through Urban Conversion Grants, town Improvement Grants, Joint Ventures, improving overall environmental attractiveness as well as tackling areas of poor environmental quality. Building upon the environmental opportunities of both the built and natural environment. Working together with all stakeholders to deliver healthy

vibrant and sustainable town centres improving the retail offer including the encouragement of specialist/niche retailers.

13. Settlements are identified at tier 1,2 or 3 as follows for the National Park
    - Tier 2 – Tenby
    - Tier 3 – Saundersfoot, St David's, Newport

## South West Wales Regional Retail Study, February 2017

14. A study has been conducted in partnership with Pembrokeshire County Council and Ceredigion County Council. For retail the strategy for Tenby, Saundersfoot, St Davids and Newport is to maintain their position relative to one another and larger centres outside the area. Tenby is identified as the dominant town centre within the National Park in terms of its role and function as a retail destination. Despite leaking spend to centres outside the Park area, the National Park centres are performing well with the support of resident and visitor spend. It is proposed to encourage the sympathetic regeneration of these Centres so that they can continue to remain attractive places to live and visit; provide a valuable role in meeting the needs of local communities and visitors and attract niche retail opportunities. The Regional Retail Study for South West Wales supports this approach with no specific need to allocate further retail opportunities identified.

15. Within the study, small amounts of capacity have been identified for comparison goods across the four Centres within the National Park up to 2036 (515$m^2$ for Tenby, 293$m^2$ for St Davids, 109$m^2$ for Saundersfoot and 89$m^2$ for Newport). No capacity has been identified for convenience goods. It is advised that new floorspace is likely to be occupied by tourist related retailers and be small in scale. It is important that any additional floorspace is provided in a format that is sensitive to the character of the Centres and small scale mixed use developments should be encouraged[1].

16. National policy and local criteria-based policies are in place to address proposals if received. The Regional Retail Study is a background paper to the Local Development Plan revision and can be viewed on the Authority's website.

**Local**

## Pembrokeshire Coast National Park Local Development Plan Annual Monitoring Report 2016 – Vacancy rates

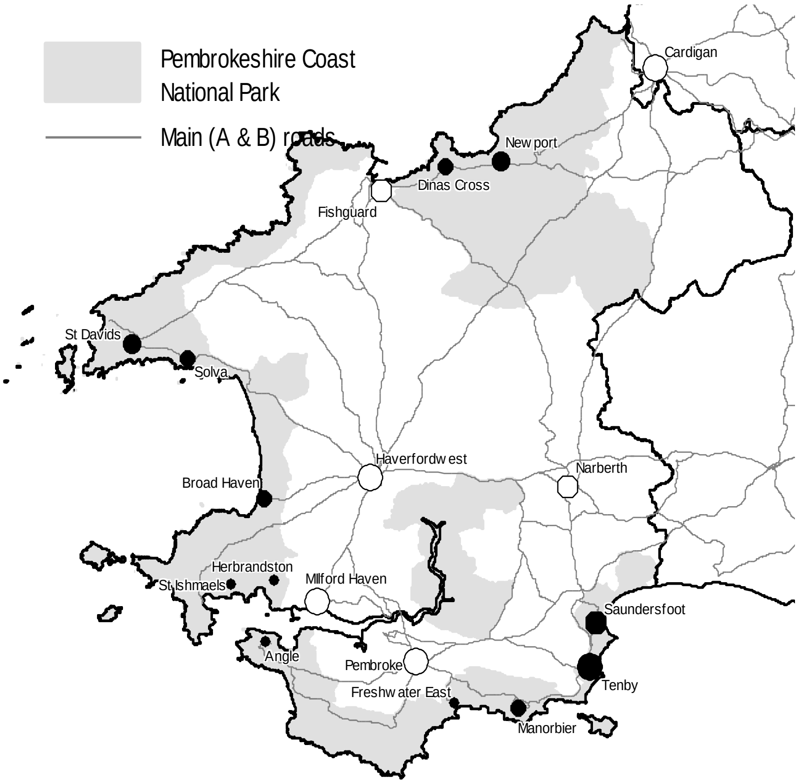
17. Across the centres of Tenby, Saundersfoot, St Davids, Solva and Newport, and for all A use class units, the average vacant floor space is 4.5% at 2017. A breakdown of vacant floor space percentage by centre is as follows, Newport 3.7%, Saundersfoot 3.2%, St Davids 1.5%, Solva 7.9% and Tenby 5.8%.

[1] South West Wales Regional Retail Study, Ceredigion County Council, Pembrokeshire County Council and Pembrokeshire Coast National Park, February 2017, page80-81.

18. No issues arise regarding vacancy rates in the National Park's retail centres. Newport, Tenby and Solva have slightly increased rates since the previous year. St Davids remained at 1.5% from the previous year, Saundersfoot has slightly reduced vacancy percentages from the previous year. Overall the vacancy percentage has increased from 3% to 4.5% since last year. For unit numbers, the average vacancy rate for the National Park is 4.3% (an increase of 0.6% from 2016): this is significantly below the national average for town centres at 14.6% (Pembrokeshire Coast National Park Authority Annual Monitoring Report for the Local Development Plan, Sept 2017, para 2.17).

## The Retail Hierarchy

### Location & Context




19. Many of the retailing centres in the National Park serve a local community and tourist function. In some cases, they have extensive rural hinterlands. However, direct competition from centres outside the National Park, including the rest of Pembrokeshire, Carmarthenshire, and Ceredigion has influenced the overall level of provision at National Park Centres. The main retail centres within the National Park are Tenby, Saundersfoot, St Davids and Newport. The main centres within the County outwith the National Park are Haverfordwest, Milford Haven, Pembroke and Pembroke Dock, Narberth and Fishguard.

## The Role and Function of Centres

20. Many of the centres within the National Park enjoy a role as visitor attractions. This increases the retail spend available to the centre, and helps to re-enforce and support the tourism role which has developed.

**Tenby**

21. Tenby is a seaside resort town with a population of about 5,000 residents. This number increases substantially particularly during the summer when there are peak tourism numbers. Tenby supports a range of services and facilities due to the increased expenditure which the centre enjoys through tourism. It is this element of the character of Tenby which defines its specialist role, and which should seek to strengthen the future retail function of Tenby through improved specialist shopping whilst maintaining a quality retail experience for local residents. Tenby does however suffer from a lack of suitable retail development opportunities. The historic fabric of the town, including the town walls, constrains retail potential and ensures that a compact centre is maintained.

22. The Wales Spatial Plan, Pembrokeshire Haven Key Settlement Framework 2021, Prepared by Pembrokeshire Haven Drafting Group, as at 07-02-07, identifies Tenby as a Tier 2 settlement – (Medium sizes settlement with a service centre role). The future role of Tenby is identified as a 'quality tourism destination and local service centre'. Tenby is not therefore seen as serving a wider role within the area.

**St David's**

23. The tourism offer of St David's itself is based primarily around the Cathedral, although there is a growing gallery culture. St David's also provides an additional point if interest for visitors to St Justinian's for example. The expenditure within the centre is buoyed up by visitors and tourists and it consequently supports a range of cafes, pubs and restaurants. It otherwise serves as a district centre, with a limited retail offer, for the residents of St David's and nearby rural areas. The development of a small supermarket at New Street has helped to secure its role. The potential to improve its specialist tourism functions, whilst maintaining the character of local independent retailing provides a good basis for the future role of the centre.

24. The Wales Spatial Plan, Pembrokeshire Haven Key Settlement Framework 2021, Prepared by Pembrokeshire Haven Drafting Group, as at 07-02-07, identifies St David's as a Tier 3 settlement, identifying the future role as a local centre and an important tourism centre.

**Saundersfoot**

25. Saundersfoot is a seaside resort, offering a traditional holiday opportunity for tourists. It remains however, secondary to the role of Tenby in terms of the residential population and overall shopping facilities.

26. The Wales Spatial Plan, Pembrokeshire Haven Key Settlement Framework 2021, Prepared by Pembrokeshire Haven Drafting Group, as at 07-02-07, identifies Saundersfoot as a Tier 3 settlement, identifying the future role as a local centre and an important tourism centre.

**Newport**

27. Whilst Newport enjoys an element of spending from tourists, it is well supported by local residents, having no readily accessible competing centre in the local vicinity. It has several high quality small food shops, cafes, and other facilities in particular which combine to make an attractive and historic centre.

28. The Wales Spatial Plan, Pembrokeshire Haven Key Settlement Framework 2021, Prepared by Pembrokeshire Haven Drafting Group, as at 07-02-07, identifies Saundersfoot as a Tier 3 settlement, identifying the future role as a local centre and an important tourism centre.

**Solva**

29. Solva contains a limited range of retail opportunities. The majority of active commercial properties focus on the tourism trade, facilitated by proximity to the harbour and available car parking. There are a few shops away from the harbour, including a post office and convenience store.

30. Solva is not identified within The Wales Spatial Plan, Pembrokeshire Haven Key Settlement Framework.

**Developments under the Local Development Plan**

31. There have been a number of proposals that have been approved and developed either under the existing criteria based policy of the Local Development Plan or have been part of a mixed use allocation. For Tenby and Saundersfoot, these include the development of the mixed use Local Development Plan allocation (MA707 – White Lion Street, Deer Park Tenby), under planning reference NP/13/0059, allowed in October 2013. This development includes new ground floor retail space of approximately 450m$^2$ and is now occupied by a comparison goods retailer. An associated development has recently been completed at the Delphi site on South Parade and replaces three former retail units (vacant at the time) with five ground floor A1 units totalling approximately 350m$^{\mathbf{2}}$, which is an additional 300m$^{\mathbf{2}}$ for the site, approved in July 2011 under planning reference NP/11/065.

32. Another significant retail development for the Tenby area includes a convenience store at the former Royal Mail Depot at The Green under application reference NP/13/0402, approved in November 2013. This

application was approved after the application of a sequential test, in accordance with Technical Advice Note 4 'Retailing and Town Centres' found no suitable alternative sites within the designated Tenby Town Centre. The approved development provides approximately 285m$^2$ of additional convenience floor space for the area.

33. For Saundersfoot, the redevelopment of the Cambrian Hotel and mixed use Local Development Plan allocation (MA777) within the District Centre, approved under planning reference NP/12/0054 in June 2013 will include 6 additional retail units with a combined floor space of approximately 768m$^2$. A1, A2 and A3 uses are proposed.

34. The new Tesco Express Store in Saundersfoot District Centre is now complete and in use, approved under planning reference NP/07/677 in May 2009. This store provides approximately 347m$^2$ of additional convenience floor space.

## Hierarchy of PCNPA Centres

35. The hierarchy of centres within the National Park is based on the retail provision and the role and function of the centres. Given the information provided by Technical Advice Note 4 (2016) the hierarchy for the National Park is as follows:

| **Hierarchy** | **Description (TAN4)** | **Centre** |
|---|---|---|
| Town Centres | Centres providing a broad range of facilities and services which fulfil a function as a focus both for the community and for public transport. It excludes small parades of shops purely of local significance. | Tenby |
| District centres | Groups of shops, separate from the town centre, usually containing at least one food supermarket or superstore, and non-retail services such as banks, buildings societies and restaurants | St Davids, Saundersfoot, Newport |
| Local Centres | Small grouping usually comprising a newsagent, a general grocery store, sub post office and occasionally a pharmacy, a hairdresser and other small shops of a local nature | (no centres within the National Park are considered to be local centres). |

(Solva does not satisfy any of the above classifications).

## National Park Retail Centre Composition

36. The following tables provide a summary of the retail provision for the National Park centres for both 2006 and the most recent survey conducted

in August 2014 for comparison. A current breakdown of National Park Centre composition (as of August 2014) is also provided.

**Tenby 2006**

| **Summary** | **No of Units** | **%** | **Area (sqm gross)** | **%** |
|---|---|---|---|---|
| Total commercial | | | | |
| | | | | |
| Total A Use Class | 204 | 100 | 22874 | 100 |
| | | | | |
| Total Convenience | 20 | 10 | 2839 | 12 |
| Total Comparison | 91 | 45 | 9955 | 44 |
| Total Services | 86 | 42 | 9712 | 42 |
| Total vacant | 7 | 3 | 373 | 2 |

**Saundersfoot 2006**

| Summary | No of Units | % | Area (sqm gross) | % |
|---|---|---|---|---|
| Total commercial | | | | |
| | | | | |
| Total A Use Class | 63 | 100 | 6497 | 100 |
| | | | | |
| Total Convenience | 9 | 14 | 855 | 13 |
| Total Comparison | 29 | 46 | 3012 | 46 |
| Total Services | 23 | 37 | 2557 | 39 |
| Total vacant | 2 | 3 | 73 | 1 |

**St Davids 2006**

| Summary | No of Units | % | Area (sqm gross) | % |
|---|---|---|---|---|
| Total commercial | | | | |
| | | | | |
| Total A Use Class | 53 | 100 | 7076 | 100 |
| | | | | |

| | | | | |
|---|---|---|---|---|
| Total Convenience | 4 | 8 | 1626 | 23 |
| Total Comparison | 24 | 45 | 3176 | 45 |
| Total Services | 24 | 45 | 2089 | 30 |
| Total vacant | 1 | 2 | 185 | 3 |

**Solva 2006**

| Summary | No of Units | % | Area (sqm gross) | % |
|---|---|---|---|---|
| Total commercial | 12 | | | |
| | | | | |
| Total A Use Class | 11 | 99 | 1857 | 101 |
| | | | | |
| Total Convenience | 1 | 9 | 126 | 7 |
| Total Comparison | 5 | 45 | 697 | 38 |
| Total Services | 5 | 45 | 1034 | 56 |
| Total vacant | 0 | 0 | 0 | 0 |

**Newport 2006**

| Summary | No of Units | % | Area (sqm gross) | % |
|---|---|---|---|---|
| Total commercial | | | | |
| | | | | |
| Total A Use Class | 29 | 100 | 3471 | 100 |
| | | | | |
| Total Convenience | 5 | 17 | 667 | 19 |
| Total Comparison | 8 | 28 | 776 | 22 |
| Total Services | 12 | 41 | 1626 | 47 |
| Total vacant | 4 | 14 | 402 | 12 |

**Tenby 2014**

| Total Commercial | No. Units | % | Area (m2) | % |
|---|---|---|---|---|
| Total A Class Use | 182 | 100 | 20835 | 100 |
| Total Convenience | 18 | 10 | 2112 | 10 |

| | | | | |
|---|---|---|---|---|
| Total Comparison | 77 | 42 | 8901 | 43 |
| Total Services | 75 | 41 | 8740 | 42 |
| Vacant | 12 | 7 | 1082 | 5 |

**Saunderfoot 2014**

| Total Commercial | No. Units | % | Area (m2) | % |
|---|---|---|---|---|
| Total A Class Use | 67 | 100 | 6575 | 100 |
| Total Convenience | 9 | 13 | 899 | 14 |
| Total Comparison | 34 | 51 | 3012 | 46 |
| Total Services | 22 | 33 | 2513 | 38 |
| Total Vacant | 2 | 3 | 151 | 2 |

**St Davids 2014**

| Total Commercial | No. Units | % | Area (m2) | % |
|---|---|---|---|---|
| Total A Class Use | 58 | 100 | 7449 | 100 |
| Total Convenience | 5 | 9 | 503 | 7 |
| Total Comparison | 27 | 47 | 4231 | 57 |
| Total Services | 24 | 41 | 2486 | 33 |
| Total Vacant | 2 | 3 | 229 | 3 |

**Solva 2014**

| Total Commercial | No. Units | % | Area (m2) | % |
|---|---|---|---|---|
| Total A Class Use | 12 | 100 | 1524 | 100 |
| Total Convenience | 0 | 0 | 0 | 0 |
| Total Comparison | 6 | 50 | 727 | 48 |
| Total Services | 5 | 42 | 677 | 44 |
| Total Vacant | 1 | 8 | 120 | 8 |

**Newport 2014**

| Total Commercial | No. Units | % | Area (m2) | % |
|---|---|---|---|---|
| Total A Class Use | 31 | 100 | 3872 | 100 |
| Total Convenience | 5 | 16 | 687 | 18 |
| Total Comparison | 10 | 32 | 926 | 24 |
| Total Services | 15 | 48 | 2227 | 58 |
| Total Vacant | 1 | 3 | 32 | 1 |

37. The above tables display little variation in town centre retail provision or composition from 2006 – 2014 (including surveys conducted in 2011 and 2013).

38. Analysis of data within this period also shows no changes from this trend, with consistently lower than average vacancy rates. This indicates that the adopted Local Development Plan policies are performing well with regard to protecting the vitality and vibrancy of the town and district centres and conserving their specific characters.

**Tenby 2014**

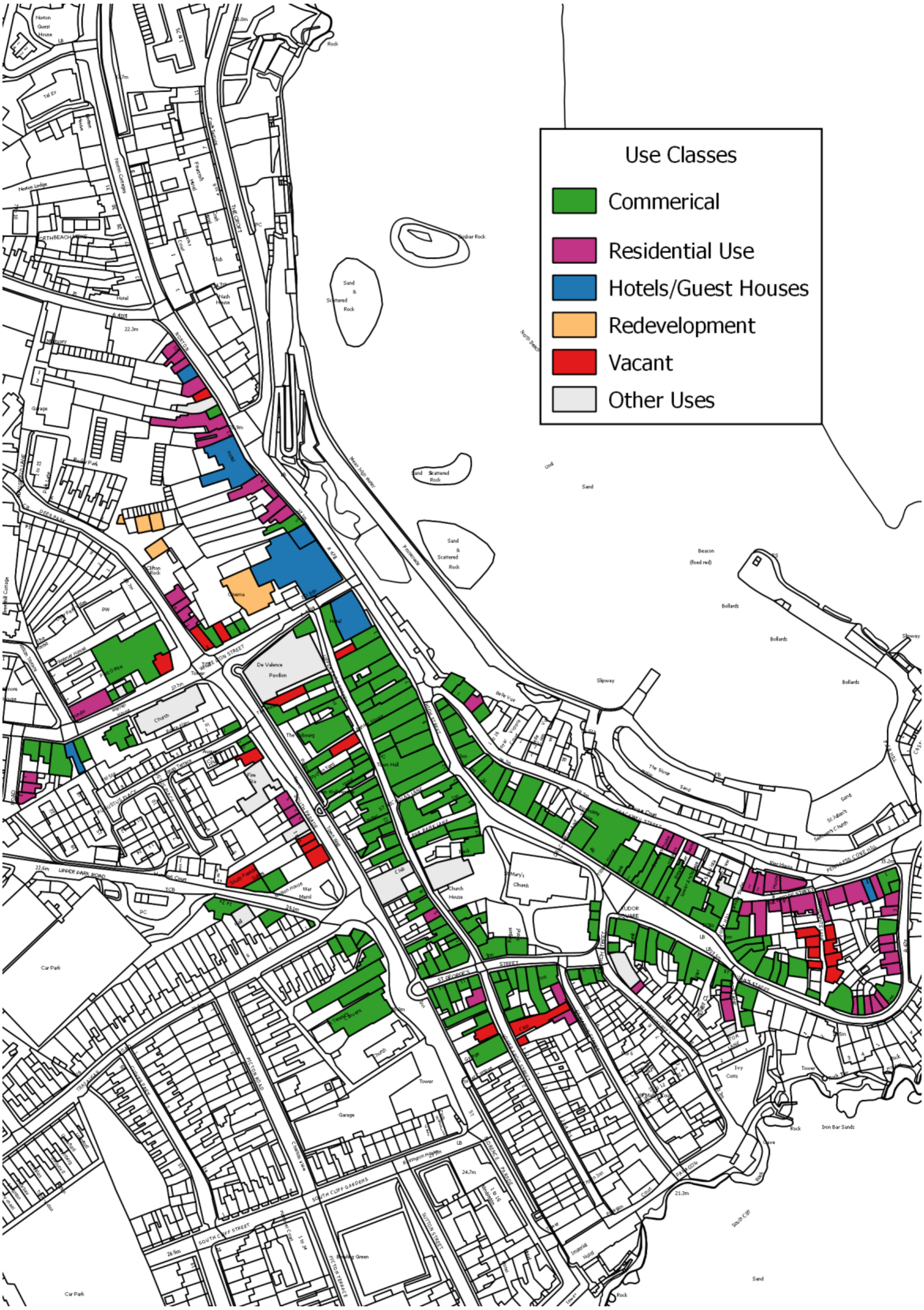
| Convenience | No. Units | % | Footprint | % |
|---|---|---|---|---|
| Bakers | 5 | 28 | 269 | 13 |
| Confectionary Shop | 7 | 39 | 230 | 11 |
| CNT (convenience, newspapers, tobacco,) | 1 | 6 | 172 | 8 |
| Convenience food store (small general or specific e.g. chocolate or sandwich shop) | 2 | 11 | 726 | 34 |
| Delicatessen shop | 1 | 6 | 126 | 6 |
| Green Grocer | 1 | 6 | 89 | 4 |
| Market Hall (predominantly convenience) | 1 | 6 | 500 | 24 |
| Total | 18 | 100 | 2112 | 100 |

| Comparison | No. Units | % | Footprint | % |
|---|---|---|---|---|
| Antique Shop | 1 | 1 | 75 | 1 |
| Art Gallery/Studio/Coffee/Café/Gifts | 5 | 7 | 663 | 7 |
| Book Shop | 2 | 3 | 131 | 1 |
| Card Shop | 2 | 3 | 270 | 3 |
| Charity Shop | 4 | 5 | 647 | 7 |
| Chemist (inc Pharmacy) | 2 | 3 | 405 | 5 |
| Clothes (Childrens inc babywear) | 1 | 1 | 42 | 0 |
| Clothers (General) | 16 | 21 | 2344 | 26 |
| Clothers (General) & Beach Shop | 1 | 1 | 97 | 1 |
| Clothes (Ladies) | 4 | 5 | 397 | 4 |
| Computer Shop | 1 | 1 | 159 | 2 |
| Craft inc Jewellry | 1 | 1 | 31 | 0 |
| Cycle Shop | 1 | 1 | 45 | 1 |
| Department Store | 3 | 4 | 578 | 6 |
| Electrical goods (white goods eg refridgeration, also HiFi, irons, kettles etc) | 1 | 1 | 92 | 1 |
| Fancy Dress Shop | 1 | 1 | 74 | 1 |
| Gift Shop inc clothes & crafts | 17 | 22 | 1766 | 20 |
| Hardware | 1 | 1 | 120 | 1 |
| Jewellers, Jewellry and Gifts | 6 | 8 | 461 | 5 |
| Mobile Phone Shop | 1 | 1 | 31 | 0 |
| Music Store | 1 | 1 | 56 | 1 |
| Shoe Shop | 2 | 3 | 211 | 2 |
| Stationers | 1 | 1 | 148 | 2 |
| Toy Shop | 1 | 1 | 58 | 1 |
| Total | 76 | 100 | 8901 | 100 |

| **Services** | **No. Units** | **%** | **Footprint** | **%** |
|---|---|---|---|---|
| Banks | 6 | 8 | 824 | 9 |
| Betting Office | 3 | 4 | 289 | 3 |
| Booking Office | 1 | 1 | 61 | 1 |
| Café | 8 | 11 | 666 | 8 |
| Café Bar | 3 | 4 | 488 | 6 |
| Coffee Shop | 1 | 1 | 87 | 1 |
| Estate Agents | 5 | 7 | 547 | 6 |
| Financial Advisors | 1 | 1 | 42 | 0 |
| Hair and Beauty Parlour inc tanning | 3 | 4 | 269 | 3 |
| Hairdressers (inc Barbers | 5 | 7 | 288 | 3 |
| Ice Cream Parlour | 1 | 1 | 82 | 1 |
| Information Centre | 1 | 1 | 404 | 5 |
| Laundrette and Repair | 1 | 1 | 75 | 1 |
| Post Office | 1 | 1 | 912 | 10 |
| Public House | 11 | 15 | 1342 | 15 |
| Restaurant/Café | 1 | 1 | 88 | 1 |
| Restaurant | 10 | 13 | 1248 | 14 |
| Restaurant & Take Away | 7 | 9 | 750 | 9 |
| Solicitors | 2 | 3 | 63 | 1 |
| Take Away | 3 | 4 | 115 | 1 |
| Tapas & Wine Bar | 1 | 1 | 100 | 1 |
| Total | 75 | 100 | 8740 | 100 |

| **Other Services** | **No. Units** | **%** | **Footprint** | **%** |
|---|---|---|---|---|
| Amusement Centre | 1 | 5 | 189 | 3 |
| Social Club/Function Hall | 4 | 19 | 1633 | 26 |
| Church | 1 | 5 | 551 | 9 |
| Church Hall | 1 | 5 | 335 | 5 |
| Fire Station | 1 | 5 | 345 | 5 |
| Garage | 2 | 10 | 266 | 4 |
| Hotel/Guest House | 6 | 29 | 2446 | 39 |
| Museum | 1 | 5 | 75 | 1 |
| Sport Therapy Practice | 1 | 5 | 31 | 0 |
| Tattoo Parlour | 1 | 5 | 132 | 2 |
| Vacant | 2 | 10 | 294 | 5 |
| Total | 21 | 100 | 6297 | 100 |
| Vacant/B8 Storage (Sergeants Lane) | 8 | | | |

## Tenby 2014


Use Classes
Commerical
Residential Use
Hotels/Guest Houses
Redevelopment
Vacant
Other Uses

**Saundersfoot 2014**

| **Comparison** | | | | |
|---|---|---|---|---|
| **TypeID** | **No. Units** | **%** | **Total Footprint** | **%** |
| Art shop and gallery | 1 | 3 | 71 | 2 |
| Chemist (incl. Pharmacy) | 1 | 3 | 101 | 3 |
| Clothes (Childrenswear (incl. babywear)) | 1 | 3 | 73 | 2 |
| Clothes (General) | 6 | 18 | 765 | 25 |
| Clothes (Ladies) | 1 | 3 | 80 | 3 |
| Craft Shop | 1 | 3 | 52 | 2 |
| Flower Shop | 1 | 3 | 68 | 2 |
| Gift Shop | 13 | 38 | 989 | 33 |
| Gift Shop and Soft Furnishings | 1 | 3 | 80 | 3 |
| Glazing and Stained Glass | 1 | 3 | 82 | 3 |
| Hardware | 1 | 3 | 233 | 8 |
| Jewellers | 1 | 3 | 28 | 1 |
| Jewellry and Accessories | 1 | 3 | 64 | 2 |
| Outdoor shop | 2 | 6 | 175 | 6 |
| Pet Shop | 1 | 3 | 105 | 3 |
| Shoe Shop | 1 | 3 | 45 | 2 |
| Total | 34 | 101 | 3012 | 100 |
| | | | | |

| **Services** | | | | |
|---|---|---|---|---|
| **TypeID** | **No. Units** | **%** | **Total Footprint** | **%** |
| Café & takeaway | 1 | 5 | 32 | 1 |
| Coffee Shop | 2 | 9 | 102 | 4 |
| Display in connection with above pet shop | 1 | 5 | 206 | 8 |
| Estate Agent | 1 | 5 | 43 | 2 |
| Hair and Beauty Studio | 1 | 5 | 43 | 2 |
| Hairdressers (incl. barbers) | 1 | 5 | 62 | 2 |
| Post Office | 1 | 5 | 81 | 3 |
| Public House | 4 | 18 | 686 | 27 |
| Rest & Bar | 1 | 5 | 233 | 9 |
| Rest & Taway | 6 | 27 | 647 | 26 |
| Restaurant | 1 | 5 | 260 | 10 |

| | | | | |
|---|---|---|---|---|
| Take-away | 1 | 5 | 55 | 2 |
| Travel agents | 1 | 5 | 62 | 2 |
| Total | 22 | 100 | 2513 | 100 |

| **Other Services** | | | | |
|---|---|---|---|---|
| **TypeID** | **No. Units** | **%** | **Total Footprint** | **%** |
| Amusement Centre | 1 | 50 | 471 | 76 |
| Hotel | 1 | 50 | 151 | 24 |
| Total | 2 | 100 | 622.506 | 100 |
| | | | | |

| **Other Vacant** | **Use Class** | **Building Footprint** | | |
|---|---|---|---|---|
| Thomas Memorial Chapel | D1 | 204 | | |

## Saundersfoot 2014

## St Davids 2014

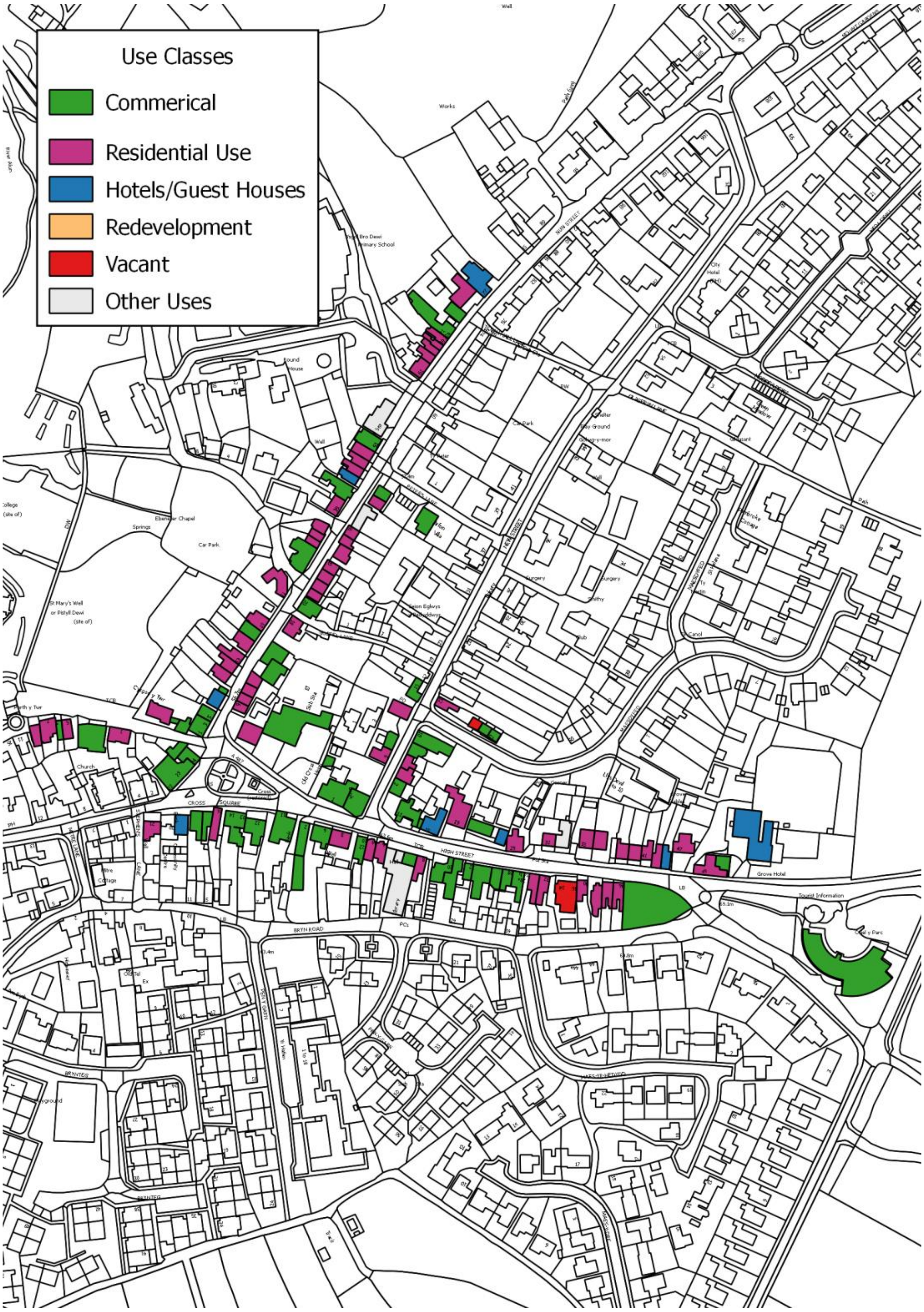
| Convenience | No. Units | % | Footprint | % |
|---|---|---|---|---|
| Butchers | 1 | 20 | 104 | 21 |
| Confectionary Shop | 2 | 40 | 189 | 38 |
| Delicatessen shop | 1 | 20 | 90 | 18 |
| Green Grocer | 1 | 20 | 120 | 24 |
| Total | 5 | 100 | 503 | 100 |

| Comparison | No. Units | % | Footprint | % |
|---|---|---|---|---|
| Art Gallery/Studio | 6 | 22 | 569 | 13 |
| Art Gallery & Coffee/Gift Shop | 2 | 7 | 251 | 6 |
| Art Gallery, Information Centre, Gifts and Café | 1 | 4 | 856 | 20 |
| Book Shop | 1 | 4 | 35 | 1 |
| Charity Shop | 1 | 4 | 49 | 1 |
| Chemist (inc Pharmacy) | 1 | 4 | 171 | 4 |
| Clothers (General) | 3 | 11 | 501 | 12 |
| Garden Centre | 1 | 4 | 752 | 18 |
| Gift Shop | 5 | 19 | 392 | 9 |
| Gift Shop & Clothing | 1 | 4 | 63 | 1 |
| Hardware | 1 | 4 | 217 | 5 |
| Household Joinery | 1 | 4 | 20 | 0 |
| Outdoor Shop | 1 | 4 | 129 | 3 |
| Shoe Shop | 1 | 4 | 162 | 4 |
| Surf Shop | 1 | 4 | 64 | 2 |
| Total | 27 | 100 | 4231 | 100 |

| Services | No. Units | % | Footprint | % |
|---|---|---|---|---|
| Banks | 2 | 8 | 335 | 13 |
| Booking Office | 3 | 13 | 155 | 6 |
| Café | 4 | 17 | 443 | 18 |
| Hairdressers (inc Barbers | 2 | 8 | 103 | 4 |
| Holiday Cottage Agency | 1 | 4 | 92 | 4 |
| Hotel & Rest (GF) | 1 | 4 | 108 | 4 |
| Optician | 1 | 4 | 32 | 1 |
| Post Office | 1 | 4 | 70 | 3 |
| Public House | 1 | 4 | 246 | 10 |
| Restaurant | 4 | 17 | 629 | 25 |
| Solicitors | 1 | 4 | 14 | 1 |
| Take Away | 1 | 4 | 117 | 5 |
| Tax Consultants | 1 | 4 | 66 | 3 |
| Tea Room | 1 | 4 | 76 | 3 |
| Total | 24 | 100 | 2486 | 100 |

| **Other Services** | **No. Units** | **%** | **Footprint** | **%** |
|---|---|---|---|---|
| Hotel/Guest House | 8 | 62 | 1073 | 59 |
| Library | 1 | 8 | 30 | 2 |
| Town Hall | 1 | 8 | 392 | 22 |
| Fire Station | 1 | 8 | 187 | 10 |
| Police Station | 1 | 8 | 105 | 6 |
| Vetinary Surgery | 1 | 8 | 23 | 1 |
| Total | 13 | 100 | 1810 | 100 |

## St Davids 2014



## Solva 2014

| Convenience | No. Units | % | Footprint | % |
|---|---|---|---|---|
| Total | 0 | 0 | 0 | 0 |

| Comparison | No. Units | % | Footprint | % |
|---|---|---|---|---|
| Art Gallery | 2 | 33 | 108 | 15 |
| Art Gallery/Café | 1 | 17 | 120 | 17 |
| Gallery/Cards | 1 | 17 | 155 | 21 |
| Gift Shop | 2 | 33 | 344 | 47 |
| Total | 6 | 100 | 727 | 100 |

| Services | No. Units | % | Footprint | % |
|---|---|---|---|---|
| Café | 1 | 20 | 98 | 14 |
| Public House | 3 | 60 | 435 | 64 |
| Restaurant | 1 | 20 | 144 | 21 |
| Total | 5 | 100 | 677 | 100 |

| Other Services | No. Units | % | Footprint | % |
|---|---|---|---|---|
| Guest House | 1 | 100 | 129 | 100 |
| Total | 1 | 100 | 129 | 100 |

## Solva 2014


Use Classes
Commerical
Residential Use
Hotels/Guest Houses
Redevelopment
Vacant
Other Uses
Ty Mawr
Cambrian
Hotel
5.8m
5.8m
Solva Bridge
The
Mariners
MAIN STREET
NEW STREET
LB
PH
FB
TCB
5.0m
Quarry
(disused)
Car Park
PC
Pumping
Station
River Solva
Path (um)
Playground
Track
Kiln
(disused)
Brookside
FB
NTL
Dingle Cottage
Mill Cottage
The Old Telephone Ex
Y GRIBIN
Honeysuckle Cott
Path (um)

## Conclusions

39. When considering the evidence presented in this paper, along with the findings of the recent South West Regional Retail Study (February 2017) referred to above, it is not considered appropriate to allocate additional retail space, or to amend existing Local Development Plan policy for retail development when preparing the replacement Local Development Plan for the following reasons:

    - Existing national and Local Development Plan policies are enabling the market to provide appropriately scaled additional retail floor space for both convenience and comparison goods, where required within or on the edge of Tenby and Saundersfoot. The same policy context would apply to retail proposals in the other National Park Centres. The South West Regional Retail Study (February 2017) advises that small scale mixed use developments within or on the edge of existing Centres should be encouraged.

    - No additional capacity for convenience goods has been identified within the National Park in the South West Regional Retail Study (February 2017).

    - No new proposals for additional retail floorspace were received during the recent call for Candidate Sites (August – November 2016) as part of the Local Development Plan revision.

    - The Centres show a consistently lower than national average vacancy rate and their composition has not changed since adoption of the Local Development Plan in 2010. Recent health checks conducted as part of the South West Regional Retail Study (February 2017) indicate relatively healthy, high quality environments with strong retail markets for the Centres.

40. However, it is considered appropriate to extend the existing designated Primary Frontage in Tenby, in light of comments received during the consultation of the Preferred Strategy and the findings of Officers of the Authority. The extent of the Primary Frontage has been considered with different scenarios tested to assess the impact upon A1 share and the relationship with the core retail centre. It is proposed to extend the existing Primary Frontage to include the western side of Upper Frog Street, which causes minimal impact on the existing dominant share of A1 units within the Primary Frontage (a decrease of 2%). Furthermore, the eastern side of Upper Frog Street is already designated, the street's retail character is considered to be read as a whole rather than having two distinctive sides and as such, both sides should be included as Primary Frontage. This will be shown on the Proposals Map at Deposit stage.

41. Another option was also considered to extend the Primary Frontage to include all the walled town and Conservation Area in Tenby, as suggested in a consultation response to the draft Preferred Strategy. However, this was found to decrease the baseline share of A1 units to 42% of total units (a decrease of 22%). This was not considered to be a sufficient share; A1 use would no longer be the dominant use within the Primary Frontage as a whole. It would also lead to a large and diluted Primary Frontage area that would cover much of the wider Town Centre designation. This would not therefore promote a street hierarchy and defined core area within the designated Town Centre. It was considered by Officers that the policy would be undermined in its ability to protect the core retail centre in this case, which maintains a dominant share of A1 units.

# Appendix A

The following was originally included as part of  an assessment of the overall health and vitality of Tenby town centre, to inform the original Local Development Plan production process based on the Indicators set out in TAN4, Retailing and Town Centres. It drew on work previously undertaken by GVA Grimley on behalf of this Authority (and Pembrokeshire County Council), the Authority's own survey work and other sources. It was included in the original Retail Background Paper (December 2009). The majority of the original report has now been superseded by the South West Regional Retail Study (February 2017) and as such has now been removed, however the following is still considered relevant in assessing the overall health and vitality of Tenby. This information has been updated where possible.

**Tenby Town Centre Retail Health and Vitality Report**

## Cars

There are numerous car parks serving the centre of Tenby. The multi-storey car park is charged from Easter to end Sept (subject to review by PCC). Some spaces are reserved for permit holders and others for short-term parking. This car park is never full outside the peak season. Fills up by 10am during the peak season. Butts field car park - charged during peak season. Never full outside peak season but fills up by 11am. PCC operate park and ride service during pedestrianisation period  which takes passengers into the Walled Town and to the harbour (accessible bus). Rectory Field car park - owned by Church in Wales and charged all year. Large number of spaces are reserved for use by surrounding hotels. Remaining spaces on first come first serve basis. Regularly full and always full with traffic queuing to get in during peak season. Salterns car park - empty and usually locked outside the peak season. Fills up after other car parks have become full during peak season. PCNPA operate park and ride service during pedestrianisation period. This car park is allocated for business use in the JUDP. Development of the site is subject to a certain area being retained for park and ride or an alternative park and ride car park being made available.

Tenby is the most accessible centre in the National Park with a choice of car parks, regular bus and train services and ferry services to Caldey Island.

Tenby is currently regarded as having constrained accessibility, particularly within the walled town. Pembrokeshire County council, with the support of the National Park Authority has sought to implement a pedestrianisation scheme within the walled town. The pedestrianisation has taken place for a number of years, but remains a draft order. Following a Public Inquiry into the traffic order, the nature of the scheme was changed, during 2006, with the walled town divided into three areas, each with having varying degrees of access.  The order will now be applied during the summer holidays only and allow permit holders access during this time.

*During consultation with stakeholders on the outline regional transport plan for SW Wales (Jan 2007)*

*Poor access to range of retail services*

## Pedestrian Flow – GVA

The County Wide Retail Study (2010) made the following observations when surveying Tenby:

*'Tenby town centre is clearly a vibrant centre in terms of pedestrian movement. This was evidenced by the number of people using the centre at the time of our site visit. It was observed that the demographic included a large proportion of tourists which is consistent with one of the recognised (and principal) functions of the town.*

*Flows were particularly high between the multi-storey park on Upper Park Road (Sainsbury's), South Parade and St George's Street as people made their way from the car park to the core retail area of the town. Within the town itself, the highest levels of pedestrian activity were observed along St George's Street and High Street. It was also evident that the natural circuit that the town's street pattern provides (St George's Street – High Street – Upper Frog Street) is well-used.'* (PCC County Wide Retail Survey 2010 paras 4.98-4.100).

## Perceptions of safety

Public order offences in the form of violent crime[2] data has been provided by Dyfed Powys Police for offences taking place specifically within Tenby town centre between April 2014 and November 2015. The data reflects crime reported to the police, and does not necessarily reflect the total number of instances.

Between the above dates there were 90 offences, 60 of which were alcohol related. The original Local Development Plan Retail Background Paper (December 2009) gave a total of 30 offences for the same area between April 2005 to November 2006. However it is not possible to directly compare the frequency of offences as police definitions of offences and recording has changed. It is conceivable that more offences are now being recorded, with a further breakdown of alcohol related incidents. What is comparable is the spatial distribution of offences, which as in 2005-2006, is concentrated around areas such as High street, St Georges Street, Tudor Square and Upper Frog Street, within which there are concentrations of pubs and bars for example.

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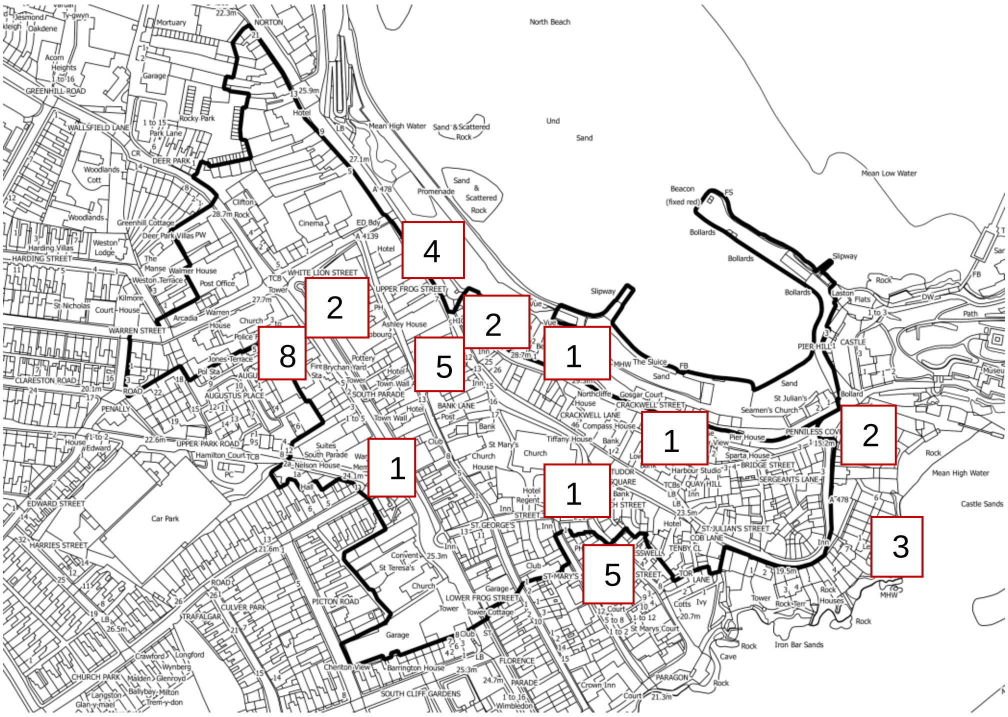
[2] Offences relate only to Actual Bodily Harm (ABH) and other injury, possession of article with blade or point, assault without injury, exposure and voyeurism, racially or religiously aggravated public fear, alarm or distress.




| | Alcohol Related | |
|---|---|---|
| Street | No | Yes |
| Bridge Street | | 2 |
| High street | 4 | 8 |
| Lower Frog Street | 1 | 4 |
| Police Station | 4 | 4 |
| South Parade | | 5 |
| St Georges Street | 6 | 6 |
| St Julian Street | | 3 |
| Tudor Square | | 16 |
| Upper Park Road | 1 | |
| Upper Frog street | 9 | 11 |
| Warren Street | 1 | 1 |
| White Lion Street | 4 | |
| Total | 30 | 60 |

## Appendix B

Sites considered at the Joint Unitary Development Plan Public Local Inquiry

| Site | Inspector's Report (summarised) |
|---|---|
| New Hedges | Any scheme…could not satisfactorily overcome the severe environmental damage..[which] would ensue from this development. It must be regarded as out-of –town. |
| Tenby - The Multi-storey car park | The Somerfield interest (1860sqm) short of the estimated need. They have not pursued their tentative approach, and neither have the Authorities shown interest in the proposition. There will be potential traffic related problems. |
| Tenby - Francis Yard | There will be potential traffic related problems. There could be relocation issues. No firm proposals for retail have ever come forward for this site. |

## References


Pembrokeshire Coast National Park Local Development Plan 2010; http://www.pembrokeshirecoast.org.uk/?PID=178

Pembrokeshire Coast National Park Local Development Plan Annual Monitoring Report 2017

Pembrokeshire Coast National Park - Annual Monitoring Report

Pembrokeshire Coast National Park Local Development Plan Background Paper: Retail: Tenby Town Centre Health and Vitality Report, December 2009; http://www.pembrokeshirecoast.org.uk/default.asp?PID=237

Pembrokeshire Coast National Park Local Development Plan Supplementary Planning Guidance: Shop Front Design, October 2011; http://www.pembrokeshirecoast.org.uk/files/files/dev%20plans/AdoptedSPG/PCNPAShopfrontSPG_eng.pdf

Pembrokeshire County Council County Wide Retail Study, 2010 by GVA Grimley

https://www.pembrokeshire.gov.uk/adopted-local-development-plan/evidence-base

Planning Policy Wales Edition 9, November 2016 http://gov.wales/docs/desh/publications/161117planning-policy-wales-edition-9-en.pdf

Policy Statement for the National Parks in Wales 'Working Together for Wales', March 2007 – Policy Statement for the National Parks and National Park Authorities in Wales;

http://www.snowdonia.gov.wales/__data/assets/pdf_file/0003/524199/National-Park-Authorities-in-Wales-Policy-Statement.pdf

Technical Advice Note 4: Retailing and Commercial Development (2016) http://gov.wales/topics/planning/policy/tans/tan4/?lang=en

Technical Advice Note 6: Planning for Sustainable Rural Communities, July 2010; http://gov.wales/topics/planning/policy/tans/tan6/?lang=en

Technical Advice Note 7: Outdoor Advertisement Control, 1996; http://gov.wales/topics/planning/policy/tans/tan7/?lang=en

Technical Advice Note 12: Design, 2016;

http://gov.wales/topics/planning/policy/tans/tan12/?lang=en

The Town and Country Planning (Development Management Procedure) (Wales) (Amendment) Order 2015; http://www.senedd.assembly.wales/mgIssueHistoryHome.aspx?IId=12791

The Town and Country (General Permitted Development) (Amendment) (Wales) Order 2014;
http://gov.wales/topics/planning/policy/dear-cpo-letters/general-permitted-development-order/?lang=en

Wales Spatial Plan Update 2008;
http://wales.gov.uk/topics/planning/development-plans/wales-spatial-plan/?lang=en

Wales Spatial Plan Pembrokeshire Haven Key Settlement Framework 2021;
http://www.pembrokeshirecoast.org.uk/?PID=174

Web links shown above were accessed 26 February 2018