APPENDIX 12: HEALTH CHECK ASSESSMENT PROFORMAS: PEMBROKESHIRE COUNTY

South West Wales Town Centre Audits and Health Checks

Centre - **Fishguard**	LA – Pembrokeshire County Council	Current Status – Town Centre
Centre Description	Historic centre located around roundabout at The Square with the main shopping area located along the southern part of West Street and eastern part of High Street. The secondary shopping area extends further along both these roads and Main Street. Majority of centre is within the town's Conservation Area, with just a few sites to the rear of the main frontages outside.	
Catchment Area	Fishguard has a relatively localised catchment with the majority of visits coming from Zone 8. Visits from this area are generally frequent, with nearly two-thirds of respondents visiting at least once a week. Visits from Zone 9 are also relatively high but tend to be weekly or less often.	
Use of the Centre	Local residents primarily visit the centre to undertake food shopping, with both local and longer distance visitors also visiting to undertake non-food shopping. The centre is also an important location for employment, visiting cafes/restaurants, personal and public services and leisure activities.	

Summary of Previous Health Checks and Studies

Wales Spatial Plan (Update)	2008	Identified as a Local Centre. Area requires regeneration to respond to economic change but is good example of recent regeneration.
Pembrokeshire County Wide Retail Study (GVA)	March 2010	Town Centre consists of 100 units providing 12,452 sq m of ground floor floorspace. Of this 19 units (19%) are vacant in June 2009, with (30.0%) in comparison use, 8 (8.0%) in convenience and 43 (43.0%) in service uses. However, size of units means 15.1% of floorspace is in convenience use and 22.4% is vacant including a number key and prominent buildings. Higher level of food and drink outlets noted as being linked to tourism with centre also being an important service centre for the north of the County. Mix of multiples and independent traders and built environment generally good. Concludes centre currently relatively vibrant but vacancies may suggest early stages of decline. Has potential to build on existing though. Proposed supermarket will improve retention and centre has potential to grow based on tourist trade if connections to the Harbour can be enhanced. Also requires

		more comparison provision.
PCC Retail Survey Data	October 2011	Very little overall change in terms of the unit numbers and types of units since the 2009 survey.

2016 Health Check

Use	No of Units	% of Units 100%			Gross Floorspace (building footprint)	% Floorspace (A uses gross)
		All	A Class uses			
Convenience (A1)	4	4.0%	4.1%		1,580	10.7%
Comparison (A1)	35	35.0%	35.7%		5,468	36.9%
Retail Service (A1)	9	9.0%	9.2%		600	4.0%
Financial/Business (A2)	14	14.0%	14.3%		1,690	11.4%
Food and Drink (A3)	20	20.0%	20.4%		2,774	18.7%
Miscellaneous/Other	2	2.0%			212	1.4%
Vacant (A Class)	16	16.0%	16.3%		2,493	16.8%
Total	100	100%	100%		14,816	100%

Multiple Retailers (9+ shops)	Total = 14	Key Independents
Including: Co-operative Nisa Banks x3	Boots Lloyds Pharmacy Peacocks	Martin & Danielles

Community Facilities	Centre includes a good range of D1 uses including cinema, town hall, medical centre and galleries.
Visitor Provision	Centre includes a large number of hotels, bars and restaurants reflecting the proximity to Fishguard harbour and ferry terminal. However, a significant number of such businesses have closed during the last 5 years.

Long Term Vacancy	There are a number of units that have been vacant since 2011 or earlier. However these appear to be distributed throughout the centre and thus are likely to reflect the characteristics of the individual units rather than their location within the centre.
Changes in representation and vacancy levels	Vacancy rates are above average with relatively high number of both A1 and A3 vacancies. Latter are the more obvious within the centre as they include a number of larger and prominently located buildings.
Mix of Uses	Overall mix of uses close to national average, although convenience provision is slightly below average and majority of occupiers are independents. Centre includes a number of charity shops and other community groups, the appearance of which detract from the overall offer but also evidence of new independent operators opening and investing in existing units.

Accessibility	Fishguard benefits from good road accessibility via the A40 from the south and A487 from the east. It is also served by rail and is a major ferry terminal for services to Ireland. Within the centre road widths are generally adequate to cope with through traffic and pedestrian access is good.
Car Parking provision	The main car park at West Street is well located to serve both the retail and service offer of the centre and is supplemented by off-street parking at the Co-op and Wallis Street, and limited on-street parking.
Pedestrian Flows	Main pedestrian flows seen along West Street and around The Square.
Conclusions on Accessibility	Centre benefits from good accessibility both to and within the centre, although there are a few locations where pedestrian access is more difficult due to narrow pavements. A range of car parking is available.

Retailer Demand	Carter Jonas' assessment of retailer requirements has not identified any specific retailer requirement for the town. However, this is likely to reflect the fact that the majority of occupiers would be independent traders.
Customer Views	Fishguard is liked for being an attractive centre. It is considered to be traditional and both quiet and compact. The pubs/cafes/restaurants are also considered to be good but many respondents would like an improved retail offer, particularly more comparison retailers and also more high street multiples.
Crime	Statistics from UKCrimeStats.com indicate 274 crimes in the last year (July 2015 – June 2016) for a daytime population of 4,154 in postcode sector SA65 9. This represents a rate of 6.6%, with 2.2% of all crimes relating to shoplifting and 44.2% to Anti-Social Behaviour. This is low compared with the national crime rate for England and Wales of 9.7%.
Environmental Quality	The environmental quality of the centre is generally good, with the majority of buildings in a good state of repair and evidence of recent investment in some. Public spaces are clean and planting and hanging baskets increase the overall attractiveness. However there are a number of units both occupied and vacant that detract from the appearance of the town.

Development Opportunities	The adopted LDP allocates the Old Primary School site on off West Street for the development of a convenience store (RT/034/01). The Council have purchased the former Ship and Anchor public house to extend the site and it is understood that a development partner is being sought. The site represents a good development opportunity to enhance the centre.

Current View of Centre

Strengths	Designated Conservation Area and historic street pattern Established resident population and catchment	Weaknesses/Gaps	Number and prominent location of vacancies
Opportunities	Primary School site Abergwaun Hotel Increased visitor draw	Threats	Changes to ferry services Continued vacancy levels
Conclusions on Health of Centre	Fishguard is an important centre for its catchment area and offers a good range of retail, service and leisure facilities. The town centre is generally healthy but is clearly continuing to experience difficult times with above average vacancies and a relatively high number of charity/community shops. However, there is also evidence of new investment and the centre has a large range of non-retail services and facilities that ensure it continues to attract and serve its catchment area. It will be important to ensure that prominent vacant units are redeveloped/brought back into use (Primary school/Ship and Anchor site and Abergwaun Hotel) to maintain/increase investment confidence and secure the future health of the centre. The potential to further develop visitor trade may assist with this.		

Fishguard

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
June 2009	30	8	43	0	19		100	30.0%	8.0%	43.0%	0.0%	19.0%		100.0%
October 2011	31	6	46	0	9	5	97	32.0%	6.2%	47.4%	0.0%	9.3%	5.2%	100.0%
2016	34	4	45	0	16		99	34.3%	4.0%	45.5%	0.0%	16.2%	0.0%	100.0%
2016 revised	35	4	43	2	10	6	100	35.0%	4.0%	43.0%	2.0%	10.0%	6.0%	100.0%

Year	Floorspace of Units							% of Floorspace						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
June 2009	3,518	1,880	4,260	0	2,794		12,452	28.3%	15.1%	34.2%	0.0%	22.4%		100.0%
October 2011	4,275	1,826	5,575	0	942	n/a	12,618	33.9%	14.5%	44.2%	0.0%	7.5%		100.0%
2016	5,428	1,612	5,485	0	2,404		14,929	36.4%	10.8%	36.7%	0.0%	16.1%		100.0%
2016 revised	5,468	1,580	5,064	212	1,094	1,399	14,817							0.0%

South West Wales Town Centre Audits and Health Checks

Centre - **Haverfordwest**	LA – Pembrokeshire County Council	Current Status – Sub-Regional Town Centre
Centre Description	County town of Pembrokeshire and important retail and service centre. The majority of the town centre is covered by a Conservation Area designation reflecting the historic nature and importance of the area. The main shopping area is divided in two by the river, with more recent developments including the main multi-storey car park on the east bank and older properties on the west bank . The main frontages comprise a cross, with primary frontages along the east bank river frontage and Bridge Street (north) and Quay Street (south), and more mixed provision along the east/west aligned Victoria Place and High Street.	
Catchment Area	The household survey indicates that Haverfordwest has a primary catchment area which includes Zones 1, 2, 3 and 8 with over half of respondents visiting the town centre on a weekly basis. Trade draw from Zones 4 and 7 is also high. Residents of Zones 5, 6, 9 and 10 tend to visit less frequently with more than half of all respondents in Zone 10 never visiting the town. Visits from residents living in the rest of Ceredigion (Zones 11-16) are very infrequent.	
Use of the Centre	The main reasons for visiting the centre are for food and non-food shopping, followed by the use of financial and public services. Employment is also an important reason for visiting for those from the wider area.	

Summary of Previous Health Checks and Studies

Wales Spatial Plan (Update)	2008	Identified as Pembrokeshire's County Town and an important centre for retailing, services, health provision and public administration. Town centre is under-performing and lacks the range of quality retail, commercial and visitor facilities needed to realise its potential. Town centre renewal required to improve its performance, provide for increased population and attract more visitors to the town.
Pembrokeshire County Wide Retail Study (GVA)	March 2010	Largest retail centre in the County with 197 units providing 34,036 sq m of ground floor floorspace. Of this 30 units (15.2%) are vacant in June 2009, with 88 (44.7%) in comparison use, 11 (5.6%) in convenience and 67 (34.0%) in service uses (1 in 'other'). Good representation of national multiples but need for regeneration

		recognised in policy. Refurbishment of buildings and public realm has improved overall quality and attractiveness of the environment and expectation that vacancies will decrease but consider that town needs to strengthen its performance, through an improved environment and better quality retailer representation in the town centre. Potential development sites identified. Extensive out-of-town provision noted and recommended that the provision of new floorspace be focused on the town centre.
PCC Retail Survey Data	October 2011	Very little overall change in terms of the unit numbers and types of units since the 2009 survey.

2016 Health Check

Use	No of Units	% of Units 100%			Gross Floorspace (building footprint)	% Floorspace (A uses gross)
		All	A Class uses			
Convenience (A1)	13	5.3%	5.4%		1,837	4.9%
Comparison (A1)	91	37.1%	37.8%		17,126	45.4%
Retail Service (A1)	34	13.9%	14.1%		3,453	9.2%
Financial/Business (A2)	40	16.3%	16.6%		6,129	16.2%
Food and Drink (A3)	26	10.6%	10.8%		3,383	9.0%
Miscellaneous/Other	4	1.6%			1,293	
Vacant (A Class)	37	15.1%	15.3%		5,790	15.4%
Total	245	100%	100%		39,011	100%

** Vacancies exclude those at Riverside Market*

Multiple Retailers (9+ shops)		Total = 61	Key Independents
Including: Iceland Holland & Barrett Banks x4	Argos Bon Marche Clarks Mountain Warehouse Peacocks Shaws Superdrug WH Smith Wilkinsons		Vaughans Electrical stores Victoria Bookshop

Community Facilities	The pressures on Council and other budgets have resulted in a decline in community facilities within the town centre in recent years, although the proposed conversion of the Riverside Market building will partially reverse this trend. A consultation on the delivery of leisure, cultural and tourism services is currently underway and the outcome may also have repercussions for the town centre.
Visitor Provision	Limited provision specifically for tourists, although there are a number of hotels in the town centre.

Long Term Vacancy	Fifteen units identified as having been vacant since 2011 (although some may have been let during the period), with nearly half being on High Street.

Changes in representation and vacancy levels	Centre has seen increase in vacancies since 2011 particularly with regard to floorspace. Number of service units has increased but floorspace devoted to convenience and comparison sales has decreased suggesting closure of a number of larger units. Current high levels of vacancies within the Riverside Market are related to its proposed redevelopment and have therefore been excluded from the analysis.
Mix of Uses	Centre has high proportion of A2 uses but below average convenience, A1 service and food and drink uses. The comparison offer is above average, as is vacancies.

Accessibility	The location of the town and its role as the County town of Pembrokeshire means Haverfordwest benefits from good accessibility by road from all directions. In terms of public transport the bus station provides the main network hub for the whole county. It is also served by a railway station, although this is located a short distance to the east of the centre. Within the town the river restricts access points between the two parts of the town centre, but otherwise pedestrian accessibility is generally good, with street surfaces improved to prioritise pedestrian movements, pavements of sufficient width and car free areas.
Car Parking provision	Car parking is provided in a range of on and off street locations, with the main car park being the multi-storey off Cartlett Road. Parking is also available on the edge of the centre, linked to retail units. Overall number of spaces appears to be adequate but access and appearance of much does not encourage visitors.
Pedestrian Flows	The layout of the centre means pedestrians can take various routes between the different parts of the centre but the bridge crossings focus this, with the pedestrian only routes across (Old Bridge and Riverside) being the most well used. At the time of the visit pedestrian flows were highest along the east bank of the centre.
Conclusions on Accessibility	The centre benefits from good accessibility from the surrounding area. Accessibility within the centre is generally good but the riverside location and restricted crossing points do result in some physical limitations, making it less easy to negotiate than might otherwise be the case for its size, but adding to the character.

Retailer Demand	Carter Jonas' assessment of retailer requirements has identified just two requirements for the town from Frankie & Benny's and Domino Pizza Group. The maximum requirement would be for just over 9,000 sq ft.
Customer Views	Haverfordwest is seen as a convenient centre for many respondents. It is considered to have a good range of non-food shops by those in the wider catchment but those living in the immediate area would like to see more non-food and national multiples. Fewer vacant shops, less charity shops and improvements to buildings and the environment are also wanted. Locally a minority of respondents indicate they consider it to be have attractive environment and its compactness is appreciated.
Crime	Statistics from UKCrimeStats.com indicate 910 crimes in the last year (July 2015 – June 2016) for a daytime population of 10,273 in postcode sector SA61 2. This represents a rate of 8.9%, with 9.7% of all crimes relating to shoplifting and 42.4% to Anti-Social Behaviour. The area has the highest rate of crime of the 2 postal sectors in SA61 although it is below the national crime rate for

	England and Wales of 9.7%.
Environmental Quality	The location of the centre on the river and adjacent to the castle and the Conservation Area designation of the wider area means the centre is generally attractive and the general environment is of a good quality. The retail offer within the centre is more mixed, with a number of buildings clearly in need of investment, whilst some of the more recent development such as the multi-storey car park are functional in appearance and add nothing to the character of the town.

Development Opportunities	The current redevelopment of the Riverside Market represents an important project to assist in revitalising the west bank of the River and extending the draw of the town. The proposed development of the Fred Rees site (site RT/040/01) in the adopted LDP remains to be implemented but would clearly improve the comparison offer in the town if brought forward. Emerging plans for the Wilkinson's store site also offer the potential to strengthen the diversity of uses within the centre and thus its draw.

Current View of Centre

Strengths	Historic centre and Conservation Area Presence of River	Weaknesses/Gaps	Long term vacancies
Opportunities	Greater exploitation of river and historic setting Implementation of emerging masterplan	Threats	Extensive out-of-town retail offer Vacancies/environment putting shoppers off visiting
Conclusions on Health of Centre	Haverfordwest is largest centre in Pembrokeshire with a good range of retail and other services. It has a wide catchment area and is visited regularly, but is continuing to struggle to adapt to changing retail and service demand and the high levels of vacancies, including long-term vacancies, suggest the centre remains vulnerable. Its strong comparison, financial and retail service offer needs to be complemented by an improved food & drink offer to reflect changing shopping habits and better serve its catchment population and visitor requirements. The convenience offer within the centre is limited and opportunities to improve the range of specialist/independent retailers should be explored. The overall offer however is complemented by the edge-of-centre national multiples.		

Haverfordwest

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
June 2009	88	11	67	1	30		197	44.7%	5.6%	34.0%	0.5%	15.2%		100.0%
October 2011	87	12	89	0	20	9	217	40.1%	5.5%	41.0%	0.0%	9.2%	4.1%	100.0%
2011 (Revised)	93	13	89	4	20	10	229	40.6%	5.7%	38.9%	1.7%	8.7%	4.4%	100.0%
2016	100	2	100	0	45		247	40.5%	0.8%	40.5%	0.0%	18.2%	0.0%	100.0%
2016 (Revised - exc Riverside Market vacancies)	91	13	100	4	37	3	248	36.7%	5.2%	40.3%	1.6%	14.9%	1.2%	100.0%

Year	Floorspace of Units							% of Floorspace						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
June 2009	16,456	2,044	9,788	1,160	4,588		34,036	48.3%	6.0%	28.8%	3.4%	13.5%		100.0%
October 2011	18,408	2,417	12,273	0	2,942	N/a	36,040	51.1%	6.7%	34.1%	0.0%	8.2%		100.0%
2011 (Revised)	19,016	2,485	12,109	937	2,942	1,228	38,717	49.1%	6.4%	31.3%	2.4%	7.6%	3.2%	100.0%
2016	19,816	814	13,050	0	5,943		39,623	50.0%	2.1%	32.9%	0.0%	15.0%	0.0%	100.0%
2016 (Revised - exc Riverside Market vacancies)	17,126	1,837	12,965	1,293	5,790	1,585	40,596	42.2%	4.5%	31.9%	3.2%	14.3%	3.9%	100.0%

South West Wales Town Centre Audits and Health Checks

Centre - **Milford Haven (exc Marina)**	LA – Pembrokeshire County Council	Current Status – Town Centre
Centre Description	Centre comprises two distinct parts. The older part is concentrated along two parallel roads away from the waterfront. Hamilton Terrace, which is nearer the waterfront is lower than Charles Street which sits behind it and contains the main retail element of the town centre. The theatre is located at the western end. Buildings are of various dates but there is little recent development although some evidence of small scale refurbishment. The newly developed Milford Marina is at located at a lower level immediately fronting the water with limited linkage between the two areas. The Marina and Hamilton Terrace are within the town's Conservation Area but Charles Street is outside.	
Catchment Area	Milford Haven has a localised catchment area with only Zone 4 residents visiting on a regular weekly or monthly basis.	
Use of the Centre	The centre is primarily used for non-food shopping with food shopping noticeably less important except for the local residents. The cafes/restaurants attract trade from the wider area, whilst the financial and public services and employment attract others.	

Summary of Previous Health Checks and Studies

Wales Spatial Plan (Update)	2008	Town centre needs to be upgraded to provide a safer, more attractive retail area. Potential to consolidate and upgrade much of the built fabric in the town centre linked to development of the quayside and docks and to the marina and marina leisure development.
Pembrokeshire County Wide Retail Study (GVA)	March 2010	Town Centre consists of 95 units providing 14,805 sq m of ground floor floorspace. Of this 12 (12.6%) are vacant in June 2009, with 28 (29.5%) in comparison use, 6 (6.3%) in convenience and 49 (51.6%) in service uses. However size of units means 29.1% of floorspace is vacant and includes a number key and prominent buildings. Comparison offer generally poor, limited convenience and multiple representation. Environment generally poor with buildings in primary frontage looking dated and tired. Suggest oversupply of service uses. Extensive out-of-town provision including Haven Head's Retail Park which ranks higher than town centre and provides alternative comparison offer. Dwindling retail function of the centre noted and considered needs to be regenerated with investment and renewal.

PCC Retail Survey Data	October 2011	Very little overall change in terms of the unit numbers and types of units since the 2009 survey.

2016 Health Check (Historic Centre – Hamilton Terrace/Charles St)

Use	No of Units	% of Units 100%			Gross Floorspace (building footprint)	% Floorspace
		All	A Class uses			
Convenience (A1)	3	2.9%	2.9%		783	5.6%
Comparison (A1)	31	30.1%	30.4%		3,827	27.2%
Retail Service (A1)	14	13.6%	13.7%		1,354	9.6%
Financial/Business (A2)	14	13.6%	13.7%		2,402	17.1%
Food and Drink (A3)	21	20.4%	20.6%		3,284	23.3%
Miscellaneous/Other	1	1.0%			171	1.2%
Vacant (A Class)	19	18.4%	18.6%		2,246	16.0%
Total	103	100%	100%		14,067	100%

Multiple Retailers (9+ shops)	Total = 15	Key Independents
Including: Greggs Banks x3 Spar	Lloyds Pharmacy The Original Factory Shop	

Community Facilities	Theatre dominates the western end of the town centre but otherwise community facilities are limited.
Visitor Provision	Limited tourist provision within main part of town centre, with such retailers preferring the Marina location.

Long Term Vacancy	A total of 9 of the units that are currently vacant were vacant in 2011, suggesting long-term vacancy is a problem. Further all but one of these units is on Charles Street but not in a particular area. This suggests the problem is affecting the whole of the main shopping area.
Changes in representation and vacancy levels	Vacancy levels in terms of both floorspace and units has increased since 2011. There also appears to have been a lot of change within the units, mainly involving independent retailers, although Greggs has opened a store during the period.
Mix of Uses	In addition to above average levels of vacancies, Milford Haven also has above average levels of financial service provision and food & drink, both in terms of the number of units and floorspace. In contrast convenience provision in the town centre is very low. There is a discernible physical division between the location of A1 shops and takeaways mainly on Charles Street and financial services and other food and drink on Hamilton Terrace.

Accessibility	The town's main approach is the A4076 which provides good access from the north, whilst east/west links are less direct. However, much of the wider area, including settlements outside of Milford Haven that could form part of the town's catchment area has similar or better access to Haverfordwest. Within the town, the main road by-passes Charles Street although access to it is good. Pedestrian accessibility along Charles Street is also good but the topography and different offer mean there is little visual or practical connection between it and Hamilton Terrace. There is also limited pedestrian access to the Marina, whilst the route to the Havens Head Retail Park is not attractive. The centre is also served by a railway station located adjacent to the nearby Retail Park.
Car Parking provision	Good on-street parking is provided along Charles Street and this is complemented by small off-street car parks off Robert Street.
Pedestrian Flows	Pedestrian flows are highest along Charles Street between Fulke Street and Priory Street. Visits to Hamilton Terrace generate lower pedestrian movements.
Conclusions on Accessibility	The town centre benefits from relatively good accessibility from its immediate hinterland and there are no major accessibility constraints within the centre. However linkage between and accessibility between the centre, the marina and the Retail Park all of which are in close proximity, is poor reducing the potential for linked trips.

Retailer Demand	Carter Jonas' assessment of retailer requirements has identified three requirements for Milford Haven for Frankie & Benny's, Domino's and Marston's. However, it is not clear whether the operators would be interested in units within the older part of the town centre, or would be looking for space at the marina or retail park. Given the existing levels of vacancies it is considered the latter is the more likely, as the requirements for between 800 and 9,000 sq ft units could be partially met within the historic centre now. Iceland have recently gained consent for a change of use from comparison to convenience retail at one of the units in the Havens Head Retail Park to implement their food Warehouse format. There is no 'new' floorspace being developed.
Customer Views	Convenience is the key attractor for local residents with the marina appreciated by both local shoppers and those from the wider area. The range of non-food shops and the pubs/cafes/restaurants are also appreciated, especially by residents of Zone 1. Locally however there is a wish for better food and non-food operators and more national multiples.
Crime	Statistics from UKCrimeStats.com indicate 1,217 crimes in last year (July 2015 – June 2016) for a daytime population of 11,247 in postcode sectors SA73 2 and SA73 3 which include the town centre and Marina areas respectively. This represents a rate of 10.8%, with 5.0% of all crimes relating to shoplifting and 52.2% to Anti-Social Behaviour. The areas have the highest rate of crime of the 3 postal sectors in SA73 with rates higher in SA73 3 (Marina) although they are similar to the national crime rate for England and Wales of 9.7%.
Environmental Quality	The quality of the main retail area is generally good with evidence of recent investment in the street scene. There is also evidence of investment in some of the properties, although others are in a very poor state and detract from the overall appearance of the area. This is especially noticeable at the western end of the street. There is also evidence of recent investment in buildings on Hamilton Street but the overall appearance of the area is reduced by the through traffic and vacant buildings at the western end of the road.

Development Opportunities	There are no allocated development sites within the LDP, but the western end of the town centre is in clear need of redevelopment.

Current View of Centre

Strengths	Range of retail provision in close physical proximity	Weaknesses/Gaps	Centre not obvious to visitors Poor state of some buildings High vacancy rates Low levels of convenience provision
Opportunities	Footfall being generated by Retail Park and Marina	Threats	New investment will go to Marina or retail park
Conclusions on Health of Centre	The older town centre area of Milford Haven is continuing to struggle and is losing occupiers and trade to Haverfordwest, the nearby Havens Head Retail Park and the more recent development at the Marina. The latter has been successful in attracting new retailers to the town and much of the marina front is included within the town centre boundary. However, it has had limited effect on the more established area, resulting in above average levels of vacancy and a number of units that have been vacant for a considerable time. The distance between the two parts of the town centre is short enough to allow linkage but topography makes it difficult and visual linkage is limited. Hamilton Terrace seems to be faring better than Charles Street. Overall therefore it would appear that the marina and retail park are healthy but the older town centre area continues to decline. Development of the currently vacant properties at the western end of Hamilton Terrace may assist integration, but the future role for Charles Street is unclear given retail operators would be expected to prefer the retail park and food & drink operators will be more attracted to the marina.		

Milford Haven

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
Town Centre														
June 2009	28	6	49	0	12		95	29.5%	6.3%	51.6%	0.0%	12.6%		100.0%
October 2011	28	4	49	0	15	8	104	26.9%	3.8%	47.1%	0.0%	14.4%	7.7%	100.0%
2011 Revised	32	3	46	5	15	6	107	29.9%	2.8%	43.0%	4.7%	14.0%	5.6%	100.0%
2016	30	3	48	1	18		100	30.0%	3.0%	48.0%	1.0%	18.0%	0.0%	100.0%
2016 Revised	31	3	49	1	19	4	107	29.0%	2.8%	45.8%	0.9%	17.8%	3.7%	100.0%
Milford Marina														
2016	9	0	9	0	1		19	47.4%	0.0%	47.4%	0.0%	5.3%	0.0%	100.0%

Year	Floorspace of Units							% of Floorspace						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
Town Centre														
June 2009	3,456	1,094	5,947	0	4,308		14,805	23.3%	7.4%	40.2%	0.0%	29.1%		100.0%
October 2011	4,053	919	8,365	0	1,625	N/a	14,962	27.1%	6.1%	55.9%	0.0%	10.9%	N/a	100.0%
2011 Revised	4,679	767	7,161	1,331	1,625	913	16,476	28.4%	4.7%	43.5%	8.1%	9.9%	5.5%	100.0%
2016	3,607	989	7,323	29	2,122		14,070	25.6%	7.0%	52.0%	0.2%	15.1%	0.0%	100.0%
2016 Revised	3,827	783	7,040	171	2,246	373	14,440	26.5%	5.4%	48.8%	1.2%	15.6%	2.6%	100.0%
Milford Marina														
2016	897	0	730	0	121		1,748	51.3%	0.0%	41.8%	0.0%	6.9%	0.0%	100.0%

South West Wales Town Centre Audits and Health Checks

Centre - **Narberth**	LA – Pembrokeshire County Council	Current Status – Town Centre
Centre Description	Traditional historic centre centred around the Market Square and High Street which extends northwards. Mainly smaller, older properties but many have been adapted to meet modern retailer requirements and centre now has a reputation for high quality niche independent retailing. The whole of the centre is within a Conservation Area.	
Catchment Area	The household survey indicates residents in the immediate vicinity (Zone 7) of Narberth visit the centre for shopping on a regular basis, with more than half visiting at least once a week. The centre also attracts shoppers from Zones 1, 6 and 9 on a less frequent but regular basis.	
Use of the Centre	Local residents primarily visit the centre to undertake food shopping, although non-food shopping is also very important. Use of public services and a place of employment are also major attractors. For those coming from further afield the main draw is the non-food shopping followed by the cafes/restaurants and food shopping offer.	

Summary of Previous Health Checks and Studies

Wales Spatial Plan (Update)	2008	Key Settlement with role as a service, employment and tourism function. Good example of recent regeneration.
Pembrokeshire County Wide Retail Study (GVA)	March 2010	Town Centre consists of 76 units providing 7,682 sq m of ground floor floorspace. Of this 3 units (3.9%) are vacant in June 2009, with 38 (50.0%) in comparison use, 6 (7.9%) in convenience and 29 (38.2%) in service uses. High level of comparison reflects centre's role as a niche independent centre and service offer reflects tourist function. Properties in good condition and well maintained. Concludes Narberth is strong, vibrant centre.
PCC Retail Survey Data	October 2011	Very little overall change in terms of the unit numbers and types of units since the 2009 survey.

2016 Health Check

Use	No of Units	% of Units 100%			Floorspace (building footprint)	% Floorspace (A uses gross)
		All	A Class uses			
Convenience (A1)	9	10.1%	10.1%		1,015	11.0%
Comparison (A1)	39	43.8%	43.8%		3,334	36.1%
Retail Service (A1)	6	6.7%	6.7%		342	3.7%
Financial/Business (A2)	13	14.6%	14.6%		1,156	12.5%
Food and Drink (A3)	20	22.5%	22.5%		3,323	36.0%
Miscellaneous/Other	0	0.0%	0.0%		0	
Vacant (A Class)	2	2.2%	2.2%		72	0.8%
Total	89	100%	100%		9,242	100.0%

** Includes estimates of gross sales areas where appropriate*

Multiple Retailers (9+ shops)	Total = 11	Key Independents
Including: Spar Costcutters Banks x3	Post Office	

Community Facilities	Centre includes Queens Hall but limited other community provision, although more facilities are available just outside the centre, including the medical centre, library and Narberth Museum.
Visitor Provision	High level of floorspace devoted to food & drink and range of comparison offer reflects attraction of centre for both tourists and residents.

Long Term Vacancy	Vacancies within the centre are very low and all the units vacant in 2011 have now been reoccupied. Thus there is no problem of long term vacancies.
Changes in representation and vacancy levels	Centre has seen an increase in its service offer since 2011 and also a small increase in convenience provision, both trends consistent with those at national level. There has been a consequential reduction in the comparison offer.
Mix of Uses	The food & drink sector has high representation in the centre and appears to be occupying some of the larger units. Retail service levels are low but financial services are above average.

Accessibility	Town is located at the junction of the A487 and B4314, with a one-way system operating through the town centre. Road access is therefore good. Within the centre, the one-way system reduces the impact of traffic through the centre and pavements are generally adequate for pedestrian movements. Accessibility is less good by Market Square given the topography and road layout.
Car Parking provision	On-street parking is supplemented by a large car park at the northern end of High Street.
Pedestrian Flows	Main pedestrian movements are along the High Street with lower flows around Market Square, Water Street and St James Street.
Conclusions on Accessibility	Centre has good general accessibility both to and within the centre.

Retailer Demand	Carter Jonas' assessment of retailer requirements has not identified any specific retailer requirement for the town. However, this is likely to reflect the fact that the majority of occupiers would be independent traders.
Customer Views	The attractive environment and range of non-food shops are the main draws for shoppers including those living locally. The centre is considered to be traditional and compact and offer a good range of independent shops. The main dislike is the car parking provision (amount and cost), although local residents would also like to see more national multiples represented.
Crime	Statistics from UKCrimeStats.com indicate 140 crimes in the last year (July 2015 – June 2016) for a daytime population of 2,272 in postcode sector SA67 7. This represents a rate of 6.2%, with 1.4% of all crimes relating to shoplifting and 43.6% to Anti-Social Behaviour. The area has a slightly higher rate of crime than the other postal sectors in SA67 but it remains low compared with the national crime rate for England and Wales of 9.7%.
Environmental Quality	The historic centre provides a high quality environment with properties, the street finish and street furniture all of a high standard. Through traffic is managed via a one-way system that reduces the impact of traffic.

Development Opportunities	The Old Primary School site is allocated for retail development in the adopted LDP (Site RT/088/01). Planning permission has been granted for a scheme including a Sainsbury's convenience store, non-food retail units and 20 residential apartments, although it is understood that Sainsbury's have now withdrawn and the scheme is unlikely to proceed. Given the location of the site and the strength of the retail market locally it would be expected that the development of the site in accordance with the LDP allocation could occur, even if the current permission is not implemented.

Current View of Centre

Strengths	Attractive environment Established retail draw Niche independent retailers	Weaknesses/Gaps	
Opportunities	Development of Primary School	Threats	Changes to balance of offer Loss of shops/services for locals Development of Primary School Becoming too popular
Conclusions on Health of Centre	Narberth is a healthy and attractive centre that has an established reputation for its retail and service offer. As a result it both meets the needs of its catchment population but also attracts visitors keen to see and experience its offer. It is healthy with low vacancies and a good range of shops and services that appeal to residents and visitors alike. Whilst the current permission for the Primary school site may not be implemented and there are no stated requirements from the national multiples, the lack of vacant space and popularity of the town suggest that there is likely to be demand for further retail provision in the town and the Primary school site remains a good development opportunity to increase the attractiveness of the centre.		

Narberth

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
June 2009	38	6	29	0	3		76	50.0%	7.9%	38.2%	0.0%	3.9%		100.0%
October 2011	38	5	36	0	3	0	82	46.3%	6.1%	43.9%	0.0%	3.7%	0.0%	100.0%
2011 (Revised)	41	7	33	0	3	0	84	48.8%	8.3%	39.3%	0.0%	3.6%	0.0%	100.0%
2016	40	4	43	1	2		90	44.4%	4.4%	47.8%	1.1%	2.2%	0.0%	100.0%
2016 (Revised)	39	9	39	0	2	0	89	43.8%	10.1%	43.8%	0.0%	2.2%	0.0%	100.0%

Year	Floorspace of Units							% of Floorspace						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
June 2009	2,915	1,079	3,531	0	157		7,682	37.9%	14.0%	46.0%	0.0%	2.0%		100.0%
October 2011	3,415	661	3,874	0	293	0	8,243	41.4%	8.0%	47.0%	0.0%	3.6%	0.0%	100.0%
2011 (Revised)	3,659	764	3,613	0	293	0	8,329	43.9%	9.2%	43.4%	0.0%	3.5%	0.0%	100.0%
2016	3,303	630	5,343	151	72		9,499	34.8%	6.6%	56.2%	1.6%	0.8%	0.0%	100.0%
2016 (Revised)	3,334	1,015	4,821	0	72	0	9,242	36.1%	11.0%	52.2%	0.0%	0.8%	0.0%	100.0%

South West Wales Town Centre Audits and Health Checks

Centre - **Pembroke Dock**	LA – Pembrokeshire County Council	Current Status – Town Centre
Centre Description	Centre comprises traditional high street with large modern supermarket to rear. Linked by purpose-built shopping centre containing a range of retail units. Whole of the centre is within the town's Conservation Area.	
Catchment Area	The household survey indicates Pembroke Dock serves a relatively localised catchment area, comprising Zone 5 where approximately half respondents visit weekly and Zones 6 and 4 where visits are less frequent.	
Use of the Centre	Pembroke Dock is strong food shopping destination for residents of Zones 4, 5 and 6 but more trade is attracted to the out-of-centre stores than to Asda in the town centre. The centre is also frequently used for some non-food shopping, especially by residents of Zones 5 and 6. Use of its financial services is restricted to the immediate vicinity only.	

Summary of Previous Health Checks and Studies

Wales Spatial Plan (Update)	2008	Investment in local shopping and tourism assets a priority to ensure town meets its potential in terms of local service provision and tourism.
Pembrokeshire County Wide Retail Study (GVA)	March 2010	Town Centre consists of 94 units providing 17,762 sq m of ground floor floorspace, making it the third largest centre in Pembrokeshire, largely due to the Asda in the town centre. Of these, 15 units (16.0%) are vacant in June 2009, with 30 (31.9%) in comparison use, 3 (3.2%) in convenience and 45 (47.9%) in service uses (1 in 'other'). However, the large size of the units means convenience represents 15.1% of floorspace and 18.3% of vacancies. Extensive out-of-town provision and dwindling retail function of the centre means centre is struggling, with prominent vacant unit clusters on Dimond Street, a generally poor built fabric and only limited national multiple presence in the centre. St Govan Shopping Centre adds nothing to the overall quality and attractiveness of the centre. Concludes centre is failing with a poor environment and high vacancies. St Govans SC offers significant

		redevelopment opportunity and opportunities to improve linkage with out of town offer should be investigated.
PCC Retail Survey Data	October 2011	Very little overall change in terms of the unit numbers and types of units since the 2009 survey.

2016 Health Check

Use	No of Units	% of Units 100%			Gross Floorspace (building footprint)	% Floorspace
		All	A Class uses			
Convenience (A1)	3	2.7%	2.7%		3,023	16.4%
Comparison (A1)	43	38.7%	39.1%		5,889	32.0%
Retail Service (A1)	16	14.4%	14.5%		1,822	9.9%
Financial/Business (A2)	17	15.3%	15.5%		2,656	14.4%
Food and Drink (A3)	11	9.9%	10.0%		1,351	7.3%
Miscellaneous/Other	1	0.9%			558	3.0%
Vacant (A Class)	20	18.0%	18.2%		3,084	16.8%
Total	111	100%	100%		18,363	100%

Multiple Retailers (9+ shops)	Total = 15	Key Independents
Including: Asda Bargain Booze Greggs Banks x 2	Boots Specsavers Vision Express	

Community Facilities	Centre includes library and health centre.
Visitor Provision	Limited obvious provision for visitors within defined centre.

Long Term Vacancy	A total of 7 units within the centre were vacant in 2011 and remain vacant in 2016. Of these three are located next to each other on Queen Street (nos 30-34), with No. 36 now in residential use. However these units appear to being refurbished at the present time.
Changes in representation and vacancy levels	Vacancy levels are currently above average and have been at a consistent rate of around 18% since 2011. Changes in offer suggest an increase in comparison provision but fall in convenience, which is contrary to national trends but may reflect the out-of-centre offer in the town (Tesco and Lidl at present, with Aldi coming) and the related offer in Pembroke Town. The changes in the convenience sector however have been extensive, with only Asda a trading in both 2011 and 2016. The expected closure of Store 21 is likely to adversely affect footfall in the St Govan's Shopping Centre if the unit is not re-occupied quickly, given the size of unit.
Mix of Uses	Size of units means proportion of units relative to national average can be misleading, but floorspace suggests a below average amount of food & drink provision but higher retail and financial services. The comparison and convenience offer is close to the national average.

Accessibility	Pembroke Dock and Pembroke both serve the Pembroke Peninsula, with Pembroke Dock benefitting from access from the A477. The town is served by a railway station to the east of the centre and is also a port and ferry terminal. Within the centre pedestrian access is generally unrestricted and sometimes prioritised.
Car Parking provision	The centre benefits from both on-street and off-street parking with the latter provided for adjacent to Asda.
Pedestrian Flows	Pedestrian flows were generally low throughout the centre at the time of the visit with alternative routes between the main parking areas and Dimond Street likely to disperse the footfall. The St Govan's Centre was particularly quiet.
Conclusions on Accessibility	The centre has good accessibility from its catchment area and no particular physical restrictions within it. Thus low footfall is likely to be the result of the centre offer rather than accessibility.

Retailer Demand	Carter Jonas' assessment of retailer requirements has not identified any requirements for Pembroke Dock, although two are noted for nearby Pembroke (Frankie & Benny's and Brighthouse). However, the town has recently attracted both Marstons and Aldi (opened November 2016), although neither are located within the town centre.
Customer Views	Pembroke Dock is liked by local residents for its convenience but respondents would like a better range of non-food/national multiples. Those from the wider area like the food and non-food stores available. Local residents would also like more places to eat out, with a small minority also wanting to see fewer vacancies, a better environment and better facilities for those with children, as well as better signposting.
Crime	Statistics from UKCrimeStats.com indicate 1,288 crimes in the last year (July 2015 – June 2016) for a daytime population of 10,781 in postcode sector SA72 6. This represents a rate of 11.9%, with 6.7% of all crimes relating to shoplifting and 41.5% to Anti-Social Behaviour. The area has the highest rate of crime of the 2 postal sectors in SA72 and it is slightly above the national crime rate for England and Wales of 9.7%.
Environmental Quality	The quality of the environment within Pembroke Dock is varied, with Dimond Street having benefitted from investment in the street scene and on-going investment in many of the buildings. The area around Asda lacks a co-ordinated/integrated approach and the St Govan's Shopping Centre is looking tired.

Development Opportunities	The St Govan's Centre site is allocated for redevelopment in the adopted LDP (Site RT/096/01) for a mix of comparison and convenience units. The site has been marketed with planning permission but we are not aware of any interest in the scheme to date. It is also unknown if retailer interest will result in the take up of the 3,000 sq m of A1 space planned for the mixed use scheme at Martello Quays or the 2,500 sq m mezzanine permitted at Asda. The consent for a 1,000 sq m net out-of-town retail unit at London Road is however being implemented and will be occupied by Aldi.

Current View of Centre

Strengths	Conservation Area designation Strong anchor (Asda)	Weaknesses/Gaps	St Govan Shopping Centre
Opportunities		Threats	Extensive out-of-town retail offer
Conclusions on Health of Centre	Pembroke Dock continues to be a struggling centre. It benefits from the draw of the centrally located Asda and the eastern part of Dimond Street appears to be trading well and offer a pleasant environment. There is also evidence of on-going investment in properties along the street. However, the St Govan's Shopping Centre which represents an important link between the Asda and the traditional retail centre and could offer the potential for an interesting range of shops, does not appear to be trading well and footfall appears to be insufficient to maintain the retail businesses. As a result, vacancies continue to be a problem in the centre. There may however be potential to improve the local food & drink offer given this growing sector is currently under-represented in the town.		

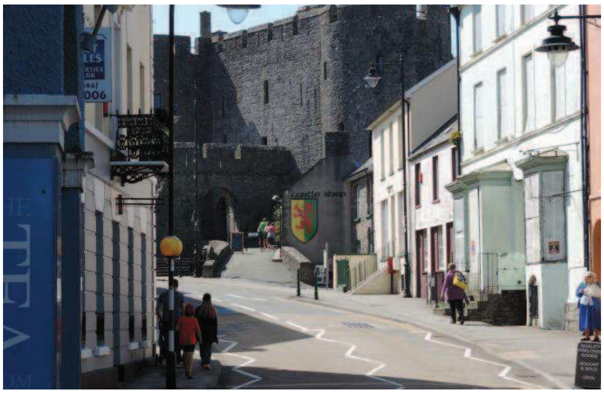
Pembroke Dock

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
June 2009	30	3	45	1	15		94	31.9%	3.2%	47.9%	1.1%	16.0%		100.0%
October 2011	36	2	46	0	10	10	104	34.6%	1.9%	44.2%	0.0%	9.6%	9.6%	100.0%
2011 Revised	40	5	42	2	10	10	109	36.7%	4.6%	38.5%	1.8%	9.2%	9.2%	100.0%
2016	45	1	44	0	21		111	40.5%	0.9%	39.6%	0.0%	18.9%	0.0%	100.0%
2016 Revised	43	3	44	1	20	0	111	38.7%	2.7%	39.6%	0.9%	18.0%	0.0%	100.0%

Year	Floorspace of Units							% of Floorspace						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
June 2009	3,823	2,680	6,443	1,568	3,248		17,762	21.5%	15.1%	36.3%	8.8%	18.3%		100.0%
October 2011	4,913	2,911	6,467	0	1,175	N/a	15,466	31.8%	18.8%	41.8%	0.0%	7.6%	N/a	100.0%
2011 Revised	6,088	3,153	5,333	222	1,175	1,631	17,602	34.6%	17.9%	30.3%	1.3%	6.7%	9.3%	100.0%
2016	6,089	2,857	5,850	0	3,315		18,111	33.6%	15.8%	32.3%	0.0%	18.3%	0.0%	100.0%
2016 Revised	5,886	3,023	5,829	558	3,084	0	18,380	32.0%	16.4%	31.7%	3.0%	16.8%	0.0%	100.0%

South West Wales Town Centre Audits and Health Checks

Centre - **Pembroke**	LA – Pembrokeshire County Council	Current Status – Town Centre
Centre Description	Historic linear high street extending eastwards from the Grade I listed Pembroke Castle (also a Scheduled Ancient Monument), with main shopping areas closest to the castle and bridge. Whole centre is within the town's Conservation Area. One-way system operates within the centre.	
Catchment Area	The household survey indicates Pembroke town centre serves a localised catchment (Zone 5). Visits tend to be less frequent than to some other centres, with less than 44% of respondents visiting on a weekly or more frequent basis. Some trade is drawn from Zones 4 and 6 but visits are infrequent.	
Use of the Centre	Pembroke is primarily used for non-food shopping followed by food shopping. It is also an important financial services centre for the immediate area and the adjoining Zone 6, whilst cafes/restaurants draw trade from a wider area.	



Summary of Previous Health Checks and Studies

Wales Spatial Plan (Update)	2008	Investment in local shopping and tourism assets a priority to ensure town meets its potential in terms of local service provision and tourism.
Pembrokeshire County Wide Retail Study (GVA)	March 2010	Town Centre consists of 119 units providing 16,975 sq m of ground floor floorspace. Of this 18 units (15.1%) are vacant in June 2009, with 36 (30.3%) in comparison use, 7 (5.9%) in convenience and 58 (48.7%) in service. Higher level of food and drink/service outlets noted as being linked to tourism but with proportionally less comparison. Also few national multiples. Expectation that vacancies will decrease given refurbishment of units currently underway. Concludes centre is attractive and functioning relatively well. It caters for a localised catchment and tourists but needs a clear strategy to ensure it functions as a complementary part of the Pembroke/Pembroke Dock secondary retail centre.
PCC Retail Survey Data	October 2011	Very little overall change in terms of the unit numbers and types of units since the 2009 survey.

2016 Health Check

Use	No of Units	% of Units 100%			Gross Floorspace (building footprint)	% Floorspace (A uses gross)
		All	A Class uses			
Convenience (A1)	7	6.0%	6.1%		1,729	9.5%
Comparison (A1)	34	29.3%	29.8%		5,916	32.6%
Retail Service (A1)	17	14.7%	14.9%		1,583	8.7%
Financial/Business (A2)	20	17.2%	17.5%		3,044	16.8%
Food and Drink (A3)	28	24.1%	24.6%		4,786	26.4%
Miscellaneous/Other	2	1.7%			430	2.4%
Vacant (A Class)	8	6.9%	7.0%		664	3.7%
Total	116	100%	100%		18,152	100%

Multiple Retailers (9+ shops)	Total = 17	Key Independents
Including: Co-op Banks x4	Lloyds Pharmacy	The Cornstone

Community Facilities	Centre has town hall, library and surgery within the centre as well as some sports clubs and other community facilities.
Visitor Provision	Large number of retail units aimed at the tourist trade within the centre especially in the food & drink sector.

Long Term Vacancy	Vacancy rates have been relatively low but four units have been identified as long term vacant, two in Northgate Street and one each in Castle Terrace and Well Hill. These are all secondary frontage areas.
Changes in representation and vacancy levels	Vacancy rates are currently below average and there has been a fall in the number of vacant, non-retail units since 2011. Vacancies have decreased along Castle Terrace, whilst there has been a small improvement in occupation on Main Street. More modern retail developments off Main Street however appear to be finding it more difficult to find occupiers.
Mix of Uses	The respective roles of Pembroke and Pembroke Dock are reflected in the mix of uses in Pembroke which has a significantly higher proportion of all Service occupiers, with financial services particularly highly represented. Floorspace devoted to convenience sales is below average.

Accessibility	Pembroke and Pembroke Dock both serve the Pembroke Peninsula. Pembroke is located away from the strategic road network but is more centrally located for the main settlements. The town is served by a railway station but it is located some distance to the east of the centre. Within the centre the one way traffic system helps reduce the impact of traffic on pedestrian movement and the main retail area has adequate pavement and crossing provision. However,

	the local topography and location of car parks to the rear of Main Street could discourage the less mobile.
Car Parking provision	Parking is provided on street and in off-street car parks to the rear of Main Street and near the Castle. Car parking areas are generally accessed off the one-way system.
Pedestrian Flows	The highest pedestrian movements were observed in the main retail area near the castle. Little movement was observed between the eastern and western ends of Main Street suggesting the two areas may operate separately reflecting the different range of uses present.
Conclusions on Accessibility	Pembroke's centre is accessible, provides reasonable off-street parking and the facilities provide for adequate pedestrian movements within it. The local topography and relatively long one way system however do not make it the most legible centre and the eastern and western ends of Main Street are unlikely to be visited regularly together due to the distances and different characters of the two areas.

Retailer Demand	Carter Jonas' assessment of retailer requirements has identified two requirements for Pembroke for Frankie & Benny's and Brighthouse. The restaurant operator is looking for 3,700 -8,000 sq ft and the retailer for 1,500 – 4,500 sq ft.
Customer Views	Local residents appreciate the attractive environment and proximity to their home and work, whilst visitors from the wider area like the range of non-food shops and the traditional character of the area as well. The café/restaurant offer and good range of independent shops is also recognised. Local residents would like to see more non-food/national multiples and more/better parking.
Crime	Statistics from UKCrimeStats.com indicate 743 crimes in the last year (July 2015 – June 2016) for a daytime population of 5,787 in postcode sector SA71 4. This represents a rate of 12.8%, with 4.8% of all crimes relating to shoplifting and 40.4% to Anti-Social Behaviour. The area has the highest rate of crime of the 2 postal sectors in SA71 and it is slightly above the national crime rate for England and Wales of 9.7%.
Environmental Quality	The environmental quality of the area is generally good. Signage is provided within the centre and pavement widths are normally sufficient to counter the through traffic. Buildings are generally well maintained.

Development Opportunities	There are no sites allocated for retail development within the adopted LDP.

Current View of Centre

Strengths	Major tourist centre Financial services centre	Weaknesses/Gaps	Vehicular traffic
Opportunities	Historic character and built form Castle River location	Threats	Online financial services
Conclusions on Health of Centre	Pembroke is a healthy and historic centre that has an established reputation for its retail and service offer. The centre is currently healthy and its complementary role to Pembroke Dock is reflected in the mix. The financial services sector is strong but the importance of the centre for the local population is reduced by the low levels of convenience provision resulting in less frequent visits and a relatively constrained catchment. The through traffic supports the centre in terms of generating awareness and passing trade but has a detrimental effect on the environmental quality. The western end of the centre near the castle appears to be trading well but the more recent developments off the main road appear to be less successful. Ensuring the centre achieves its role as a local centre as well as one serving the tourist sector is therefore the key challenge going forward.		

Pembroke

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
June 2009	36	7	58	0	18		119	30.3%	5.9%	48.7%	0.0%	15.1%		100.0%
October 2011	31	5	59	0	6	13	114	27.2%	4.4%	51.8%	0.0%	5.3%	11.4%	100.0%
2011 Revised	38	7	42	5	7	10	109	34.9%	6.4%	38.5%	4.6%	6.4%	9.2%	100.0%
2016	34	3	65	2	8		112	30.4%	2.7%	58.0%	1.8%	7.1%	0.0%	100.0%
2016 Revised	34	7	65	2	8	5	121	28.1%	5.8%	53.7%	1.7%	6.6%	4.1%	100.0%

Year	Floorspace of Units							% of Floorspace						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
June 2009	4,575	1,501	8,315	0	2,584		16,975	27.0%	8.8%	49.0%	0.0%	15.2%		100.0%
October 2011	4,778	1,539	9,056	0	502	N/a	15,875	30.1%	9.7%	57.0%	0.0%	3.2%	N/a	100.0%
2011 Revised	6,588	1,755	7,191	619	620	1,669	18,442	35.7%	9.5%	39.0%	3.4%	3.4%	9.0%	100.0%
2016	5,445	1,364	10,100	302	666		17,877	30.5%	7.6%	56.5%	1.7%	3.7%	0.0%	100.0%
2016 Revised	5,916	1,729	9,413	430	664	535	18,687	31.7%	9.3%	50.4%	2.3%	3.6%	2.9%	100.0%

APPENDIX 13: HEALTH CHECK ASSESSMENT PROFORMAS: PEMBROKESHIRE COAST NATIONAL PARK

South West Wales Town Centre Audits and Health Checks

Centre - **Newport**	LA - Pembrokeshire Coast National Park Authority	Current Status – Tier 3 Local Centre
Centre Description	Small but relatively dispersed centre concentrated around the junction of the A487 (Bridge Street) and Market Street/Long Street. Buildings comprise a mix of purpose built commercial units and refurbishments of previously residential properties.	
Catchment Area	Newport centre is used on a regular basis by the residents of Zone 9 and to a lesser extent by those in Zone 8. However, visits are slightly less regular than proximity may suggest and even in the immediate area nearly a third of respondents never visit.	
Use of the Centre	For local residents Newport is important for both food and non-food shopping and for its service offer, particularly public and personal services. Those coming from further afield are also attracted by the cafes/restaurants, leisure uses available and as a place of employment.	

Summary of Previous Health Checks and Studies

PCNPA Background Paper Update – Retail	2009	Newport enjoys an element of spending from tourists but is also 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.
Pembrokeshire County Wide Retail Study (GVA)	March 2010	Newport has several high quality small food shops, cafes and other facilities in an attractive, historic centre. The 2006 Retail Study identified a total of 33 units, with 5 in convenience use, 8 comparison, 12 service and 4 vacant. High proportion of food & Drink outlets noted and restaurants and cafes were using the pavements, adding to the vibrancy of the centre. Overall, Newport considered to be an attractive and small town centre catering entirely for local and tourism needs. The convenience offer is characterised by local independent traders, and it appears to be performing well.
Annual Monitoring Report	2014	AMR 2014 has shown Newport to have a vacancy rate of 0.8% compared with a national average of 11.9%

Annual Monitoring Report	2015	AMR 2015 has shown Newport to have no vacancies compared with a national average of 9.5%. This is less than in the previous year.
Annual Monitoring Report	2016	AMR 2016 has shown Newport to have no vacancies compared with a national average of 13.2%. This is the same as in the previous year.

2016 Health Check

Use	No of Units	% of Units 100%			Floorspace		% Floorspace (A uses gross)
		All	A Class uses		Gross (building footprint)	Net *	
Convenience (A1)	5	16.7%	17.2%		638	378	16.3%
Comparison (A1)	10	33.3%	34.5%		975	663	24.9%
Retail Service (A1)	2	6.7%	6.9%		230	120	5.9%
Financial/Business (A2)	3	10.0%	10.3%		368	N/a	9.4%
Food and Drink (A3)	9	30.0%	31.0%		1,647	N/a	42.1%
Miscellaneous/Other	1	3.3%			52	22	1.3%
Vacant (A Class)	0	0.0%	0.0%		0	0	0.0%
Total	30	100%	100%		3,910		100%

** Includes estimates of net sales areas for individual A1 stores where appropriate but excludes A2, A3 and Misc as net floorspace information missing from LPA data.*

Multiple Retailers (9+ shops)	Total = 3	Key Independents
Including: Spar, Lloyds Bank, Post Office		Havards Ironmongers

Community Facilities	Limited community facilities but evidence of a number of community-based activities being organised at the Church and Memorial Halls.
Visitor Provision	Centre includes a high proportion of food and drink outlets and gift shops to serve visitor needs.

Long Term Vacancy	Newport currently does not have any vacant retail units, with the one unit vacant in 2014 now occupied and the former Dragon Garage site being redeveloped for housing.
Changes in representation and vacancy levels	Some losses of retail space were seen prior to 2011 but since then the retail offer has seen little change. A book shop has been replaced by an estate agent, a new gallery has opened and the former Dragon Garage site is being redeveloped for housing.
Mix of Uses	Food and drink uses dominate the centre. Convenience provision is also good but the comparison offer is more restricted, with what is present split between shops meeting everyday local needs and those aimed at the tourist sector.

Accessibility	Newport is located on the A487 and thus has good accessibility by road. Within the centre accessibility is restricted by the amount of traffic on the A487 which separates Market Street and Long Street as well as the businesses on opposite

	sides of Bridge Street. Pavement widths are also restricted along Bridge Street making access difficult in places.
Car Parking provision	Some parking available on Market Street and Long Street but main provision is in the Long Street car park on the edge of the centre.
Pedestrian Flows	The main pedestrian flows are along Market Street from the car park and on Long Street. The limited retail offer, narrow pavements and volume of traffic discourage pedestrian movements on Bridge Street.
Conclusions on Accessibility	Newport is very accessible from its surrounding area and for visitors to the centre as a result of its location on the A487. However, this also causes local access issues within the centre due to the narrowness of the streets and amount of through traffic using it.

Retailer Demand	Carter Jonas' assessment of retailer requirements has not identified any specific retailer requirement for the town. However, this is likely to reflect the fact that the majority of occupiers would be independent traders.
Customer Views	The attractive environment, its compactness, traditional offer and its good pubs/cafes/restaurants are the main draws. The atmosphere/friendly people are also valued, whilst those from further afield also consider the centre has good leisure facilities. There are few dislikes about the centre itself but better/cheaper parking is wanted by a minority of local respondents and road access is considered poor by some.
Crime	Statistics from UKCrimeStats.com indicate 54 crimes in the last year (July 2015 – June 2016) for a daytime population of 2,138 in postcode sector SA42 0. This represents a rate of 2.5%, with 7.4% of all crimes relating to shoplifting and 38.9% to Anti-Social Behaviour. This is very low compared with the national crime rate for England and Wales of 9.7%.
Environmental Quality	Attractive centre with high quality setting and buildings generally in a good state of repair. Quality of the streetscene is reduced on Bridge Street by the volume of traffic trying to negotiate the narrow road through the centre.

Development Opportunities	No development sites identified in existing LDP.

Current View of Centre

Strengths	Location within National Park and on through route High quality environment	Weaknesses/Gaps	Through traffic Dispersed retail offer Restricted local population
Opportunities	Considerable passing trade	Threats	Increased traffic Closure of businesses serving local community
Conclusions on Health of Centre	Newport is a healthy and attractive centre that provides facilities for both its catchment population and visitors. It is considered to be very healthy with no current vacancies. However, it suffers from a dispersed layout and through traffic.		

Newport

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2006	8	5	12	0	4		29	27.6%	17.2%	41.4%	0.0%	13.8%	0.0%	100.0%
2016					0		30							
2016 (Revised)	5	10	14	1	0	0	30	16.7%	33.3%	46.7%	3.3%	0.0%	0.0%	100.0%

Year	Floorspace of Units (sq m gross)							% of Floorspace						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2006	776	667	1,626	0	402	0	3,471	22.4%	19.2%	46.8%	0.0%	11.6%	0.0%	100.0%
2016					0		3,910							
2016 (Revised)	975	638	2,245	52	0	0	3,910	24.9%	16.3%	57.4%	1.3%	0.0%	0.0%	100.0%

South West Wales Town Centre Audits and Health Checks

Centre - **Saundersfoot**	LA – Pembrokeshire Coast National Park Authority	Current Status – Tier 3 Local Centre
Centre Description	Predominantly tourist and convenience centre centred around harbour and beach. Main retail units located on Brewery Terrace/Cambrian Way and The Strand. Additional provision on High Street and Milford Street.	
Catchment Area	Saundersfoot centre is only used on an infrequent basis by those in the immediate area (Zone 6) and the further afield, with most local residents only using it for convenience shopping and relying on nearby Tenby for larger and less frequent purchases. Less than a quarter of survey respondents visit on a monthly or more frequent basis, with over two-thirds of respondents never visiting.	
Use of the Centre	The main reason for visiting for those living locally is for food shopping, with the non-food offer drawing from the slightly wider area. The cafes/restaurants and leisure facilities are other important draws with many visits by those from outside the immediate area linking a visit to a day out.	

Summary of Previous Health Checks and Studies

Wales Spatial Plan (Update)	2008	Local Centre with important tourism offering.
Pembrokeshire County Wide Retail Study (GVA)	March 2010	Small Town Centre consists of 51 units providing 5,629 sq m of ground floor floorspace. Of these 5 units (9.8%) are vacant in June 2009, with 20 (39.2%) in comparison use, 7 (13.7%) in convenience and 19 (37.3%) in service uses. Given the size of units, 17.4% of floorspace is vacant but this is mainly in secondary areas and thus does not dominate. Retail offer focussed on tourist trade and thus service provision higher, including high number of public houses and restaurants. Comparison offer is predominantly gift shops. Only 6.6% of floorspace is in convenience use, and thus the above average proportion of convenience stores noted as being linked to a food-based tourist offer (eg confectionary) are generally small. Mainly independent retail offer. Centre is generally pleasant and cleanliness good reflecting importance of its tourist function but some poor quality development dating from 1960s/1970s detracts from the streetscene.

Annual Monitoring Report	2014	AMR 2014 has shown Saundersfoot to have a vacancy rate of 2.3% compared with a national average of 11.9%
Annual Monitoring Report	2015	AMR 2015 has shown Saundersfoot to have a vacancy rate of 6.2% compared with a national average of 9.5%. This represents an increase on the previous year but is still below the LDP target of a maximum 10%.
Annual Monitoring Report	2016	AMR 2016 has shown Saundersfoot to have a vacancy rate of 3.9% compared with a national average of 13.2%. This represents a decrease on the previous year.

2016 Health Check

Use	No of Units	% of Units 100%			Floorspace		% Floorspace (A uses gross)
		All	A Class uses		Gross (building footprint)	Net *	
Convenience (A1)	9	13.6%	14.0%		899	635	13.5%
Comparison (A1)	28	42.4%	43.7%		2801	1919	42.0%
Retail Service (A1)	3	4.5%	4.7%		194	148	2.9%
Financial/Business (A2)	2	3.0%	3.1%		142	N/a	2.1%
Food and Drink (A3)	18	27.3%	28.2%		2412	N/a	36.2%
Miscellaneous/Other	2	3.0%			186	90	
Vacant (A Class)	4	6.1%	6.3%		219	140	3.3%
Total	66	100%	100%		6,853		100%

** Includes estimates of net sales areas for individual A1 stores where appropriate but excludes A2, A3 and Misc as net floorspace information missing from LPA data.*

Multiple Retailers (9+ shops)	Total = 2	Key Independents
Including: Tesco Express Spar		Laugharne Bread Shop Heywoods of Saundersfoot (Butchers) Frosts Hardware

Community Facilities	Focus of community facilities is in Regency Hall with sports facilities provided to the rear.
Visitor Provision	Town centre contains a variety of shops and services intended to serve the visitor market, including the Reptile Experience and Booths Amusements. Also a variety of gift shops and various cafes, restaurants and public houses.

Long Term Vacancy	Vacancies are low and there no issues with long term vacancies.
Changes in representation and vacancy levels	Vacancies have declined since the peak immediately following the recession and rates are now low, with vacant units tending to be small. Changes in occupancy have been limited but 2015-2016 has seen the closure of the Post Office and the relocation of the service to the Spar.

Mix of Uses	Mix of uses reflects the local demand and tourism with above average proportions and floorspace devoted to comparison retailing and food and drink units. The retail service and financial service offer is noticeably below the national average. Centre is predominantly occupied by independent retailers.

Accessibility	Access to Saundersfoot is via the B4316 a loop from the A476 Tenby road. A one-way system operates within the centre. Pedestrian access within the centre is generally good. Saundersfoot railway station is located approximately 2kms (1.2 miles) away.
Car Parking provision	Centre is served by two main car parks, that at the Harbour and by Regency Hall. This is supplemented by additional parking by the Hall during the peak tourist season.
Pedestrian Flows	Main pedestrian flows are concentrated along the front, with highest flows on the seaward side of Cambrian Place and The Strand. Footfall is lower along the High Street and the area has the feel of a more peripheral location.
Conclusions on Accessibility	Centre is predominantly used by visitors and has reasonable access by road. Within the centre access is generally good with much of the centre relatively flat and with good pedestrian routes.

Retailer Demand	Carter Jonas' assessment of retailer requirements has not identified any specific retailer requirement for the town.
Customer Views	The attractive environment and harbour/beach are the main reasons for visiting Saundersfoot. The compactness of the centre is also appreciated. There are few dislikes although more/better/cheaper parking is wanted by a small minority.
Crime	Statistics from UKCrimeStats.com indicate 183 crimes in the last year (July 2015 - June 2016) for a daytime population of 3,142 in postcode sector SA69 9. This represents a rate of 5.8% with 0.5% of all crimes relating to shoplifting and 42.6% to Anti-Social Behaviour. This is low compared with the national crime rate for England and Wales of 9.7%.
Environmental Quality	The environment is generally of a high quality, with most of the buildings in a good state of repair. The Harbour car park is visually prominent but traffic does not dominate and The Strand has been repaved to improve the pedestrian experience. The open space and gardens along the front add interest and quality.

Recent Investment	The Cambrian Hotel site (MA777) has been redeveloped with new housing provided at the rear and new retail/leisure units on Cambrian Place.
Development Opportunities	A new marine centre of 550 sq m is under construction at the Harbour. It will provide a 100 sq m restaurant, 196 sq m chandlery/outdoor equipment and clothing outlet and a café, as well as offices, storage and an engineering workshop.

Current View of Centre

Strengths	Attractive setting Good range of independent retailers High tourist numbers Parking within centre Good convenience provision	Weaknesses/Gaps	Limited catchment Reliance on tourism Lower footfall on High Street
Opportunities	New development/ redevelopment occurring	Threats	Fall in tourist numbers Tourist congestion Reduction in local services will reduce footfall outside of holiday periods.
Conclusions on Health of Centre	Saundersfoot is primarily a tourist centre but also serves its local market well in a high quality environment. Shops and parking have good accessibility and are located immediately adjacent to the key attractors, namely the beach and harbour. It is currently a healthy, attractive centre which has been strengthened by the opening of Tesco Express, which complements the existing Spar. Otherwise national multiple representation is very low. Units are generally small but are suitable for the tourist orientated trade seen in the centre and vacancies are low. Recent and on-going investment in the centre suggests it is attractive to investors and improved provision for tourists will help maintain the popularity of the centre.		

Saundersfoot

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2006	29	9	23	0	2		63	46.0%	14.3%	36.5%	0.0%	3.2%		100.0%
June 2009	20	7	19	0	5		51	39.2%	13.7%	37.3%	0.0%	9.8%		100.0%
2011					8		65					12.3%		
2013					4		68					5.9%		
2014	34	9	22	0	2		67	50.7%	13.4%	32.8%	0.0%	3.0%		100.0%
2015					2		67					3.0%		
2015 revised	27	9	23	1	5		65	41.5%	13.8%	35.4%	1.5%	7.7%		100.0%
2016					4		67					6.0%		
2016 revised	28	9	23	2	4		66	42.4%	13.6%	34.8%	3.0%	6.1%		100.0%

Year	Floorspace of Units (sq m gross)							% of Floorspace						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2006	3,012	855	2,557		73		6,497	46.4%	13.2%	39.4%	0.0%	1.1%		100.0%
June 2009	1,962	370	2,320		978		5,630	34.8%	6.6%	41.2%	0.0%	17.4%		100.0%
2011					571		6,592					8.7%		
2013					246		6,592					3.7%		
2014	3,012	899	2,513		151		6,575	45.8%	13.7%	38.2%	0.0%	2.3%		100.0%
2015					151		6,575					2.3%		
2015 revised	2,680	899	2,500	105	408		6,592	40.7%	13.6%	37.9%	1.6%	6.2%		100.0%
2016					274		7,009					3.9%		
2016 revised	2,801	899	2,748	186	219		6,853	40.9%	13.1%	40.1%	2.7%	3.2%		100.0%

South West Wales Town Centre Audits and Health Checks

Centre - **St David's**	LA – Pembrokeshire Coast National Park Authority	Current Status – Tier 3 Local Centre
Centre Description	St David's is a small centre, with the retail offer provided in the small units on High Street and Nun Street to the east of the Cathedral.	
Catchment Area	St David's location on the St David's Peninsula means it has a restricted rural hinterland. Thus, the centre's primary function is to meet the everyday convenience needs of the small local population and those of the tourists that visit the City and the cathedral. The majority of the residents of the St David's area (Zone 3) undertake their main food shopping in Haverfordwest. They also use the town for non-food shopping, supplementing it with online purchases.	

Summary of Previous Health Checks and Studies

Wales Spatial Plan (Update)	2008	Local Centre with important tourism offering.
Pembrokeshire County Wide Retail Study (GVA)	March 2010	Town Centre consists of 68 units providing 11,045 sq m of ground floor floorspace. Of this 3 units (4.4%) are vacant in June 2009, with 29 (42.6%) in comparison use, 5 (7.4%) in convenience and 31 (45.6%) in service uses. However, due to the size of the units, 15.5% of space is in convenience use, most provide in the CK supermarket. In contrast only 31.2% of space is in comparison use. Role of centre is primarily as a tourist destination with a growing gallery culture within the town. Hence over-representation of service uses. Centre has low vacancy rates and is vibrant and thriving. The centre is in a good state of repair, is attractive and interesting, and performing well in its current role.
Annual Monitoring Report	2014	AMR 2014 has shown St David's to have a vacancy rate of 3.1% compared with a national average of 11.9%
Annual Monitoring report	2015	AMR 2015 has shown St David's to have a vacancy rate of 3.1% compared with a national average of 9.5%. This is unchanged from the previous year.

Annual Monitoring Report	2016	AMR 2016 has shown St David's to have a vacancy rate of 1.5% compared with a national average of 13.2%. This is a reduction from the previous year.

2016 Health Check

Use	No of Units	% of Units 100%			Floorspace		% Floorspace (A uses gross)
		All	A Class uses		Gross (building footprint)	Net *	
Convenience (A1)	6		9.8%		578	435	7.7%
Comparison (A1)	27		44.3%		4,102	2,299	54.4%
Retail Service (A1)	4		6.6%		202	115	2.7%
Financial/Business (A2)	9		14.7%		640	N/a	8.5%
Food and Drink (A3)	12		19.7%		1,780	N/a	23.6%
Miscellaneous/Other	0						
Vacant (A Class)	3		4.9%		231	165	3.1%
Total	61		100%		7,533		100%

** Includes estimates of net sales areas for individual A1 stores where appropriate but excludes A2, A3 and Misc as net floorspace information missing from LPA data.*

Multiple Retailers (9+ shops)		Total = 6	Key Independents
Including: Barclays Bank Lloyds Bank	Co-operative Pharmacy Fat Face National Trust Shop		St David's Food & Wine Various Art and Craft Galleries

Community Facilities	Town Hall and Library within the town centre.
Visitor Provision	Centre has very high proportion of art and craft galleries that both serve and attract the visitor trade. There is also a good range of cafes and restaurants.

Long Term Vacancy	Vacancies within St David's are consistently low and there is only one unit which has been vacant long-term since 2011 (SDV/071).
Changes in representation and vacancy levels	Vacancy levels are low in the centre but it has lost both the HSBC bank and Post Office since 2011. Remaining national multiples include two banks and a pharmacy with the remainder aimed at the tourist trade. However these represent only a minority of occupiers, with the centre dominated by independents. The number and floorspace occupied by A Class uses has increased slightly since 2011.
Mix of Uses	The Centre has a high proportion of comparison and food & drink units with the amount of floorspace devoted to these uses also being above average. Retail services however are low as is the amount of floorspace devoted to convenience uses.

Accessibility	St David's is located on a peninsula in a relatively sparsely populated area. There is reasonable road access from the coastal area to the north but from the east, access is from the Haverfordwest road which has the greater draw. The centre itself is located around the A487 where it changes direction but centre itself has limited on-street parking, with the main car parks located away from the shops.
Car Parking provision	The main car parks are located a short walk from Cross Square (junction High Street/Nun Street). These appear to be adequate for visitor needs on most occasions.
Pedestrian Flows	The main pedestrian flows are along the High Street between the Visitor Centre car park and Cross Square. There is also good pedestrian flows along the southern part of Nun Street, and along Goat Street which links to the Cathedral and Cathedral car park.
Conclusions on Accessibility	St David's has limited accessibility as a result of its location. Within the centre visitor numbers and road widths make parking on-street difficult but pedestrian access is reasonable from the two main car parks.

Retailer Demand	Carter Jonas' assessment of retailer requirements has not identified any specific retailer requirement for the town. However, this is likely to reflect the fact that the majority of occupiers would be independent traders.
Customer Views	N/a
Crime	Statistics from UKCrimeStats.com indicate 154 crimes in the last year (July 2015 – June 2016) for a daytime population of 6,055 in postcode sector SA62 6 which includes St David's and the surrounding rural area. This represents a rate of 2.5%, with 0.6% of all crimes relating to shoplifting and 35.1% to Anti-Social Behaviour. The area has the 2nd highest rate of crime of the 4 postal sectors in SA62 but it is still very low compared with the national crime rate for England and Wales of 9.7%.
Environmental Quality	Centre offers a good quality environment adjacent to the Cathedral but the mix of through traffic and high numbers of pedestrians does detract from this, as does the limited on-street parking that does occur. The Strand has also been repaved to improve the pedestrian experience.

Recent Investment	Previously vacant building at 34-36 High Street has been partially demolished and refurbished to provide two A1/A3 units of approximately 75 sq m each.
Development Opportunities	No development sites identified in existing LDP.

Current View of Centre

Strengths	Cathedral and historic street pattern Strong independent offer	Weaknesses/Gaps	Restricted catchment Narrow pavements Through traffic
Opportunities	Improved convenience offer Extensive artist network	Threats	Potential rationalisation of multiples
Conclusions on Health of Centre	St David's is a healthy centre that primarily caters for the significant numbers of visitors seen each year whilst providing a convenience and service offer for residents within its restricted catchment area. The attraction of the Cathedral has been supported by the development of the centre as a specialist location for arts and crafts. The centre has few vacancies and a number of national multiples present despite the restricted population in the hinterland, reflecting the popularity of this tourist centre. There has been some recent loss of financial and service businesses but there appears to be sufficient remaining to meet needs within the centre. The environment is generally of a high quality but the dispersed layout and through traffic detract from this and is detrimental to pedestrian accessibility.		

St Davids

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2006	24	4	24	0	1		53	45.3%	7.5%	45.3%	0.0%	1.9%		100.0%
June 2009	29	5	31	0	3		68	42.6%	7.4%	45.6%	0.0%	4.4%		100.0%
2011					3		56					5.4%		
2013					6		58					10.3%		
2014					2		58					3.4%		
2015					2		58					3.4%		
2015 (Revised)	27	5	24	0	2		58	46.6%	8.6%	41.4%	0.0%	3.4%	0.0%	100.0%
2016					2		60					3.3%		
2016 (Revised)	27	6	25	0	3		61	44.3%	9.8%	41.0%	0.0%	4.9%	0.0%	100.0%

Year	Floorspace of Units (sq m gross)							% of Floorspace						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2006	3,176	1,626	2,089	0	185		7,076	44.9%	23.0%	29.5%	0.0%	2.6%		100.0%
June 2009	3,443	1,708	5,587	0	306		11,044	31.2%	15.5%	50.6%	0.0%	2.8%		100.0%
2011					184		7,047					2.6%		
2013					547		7,214					7.6%		
2014					229		7,449					3.1%		
2015					229		7,449					3.1%		
2015 (Revised)	4,140	503	2,566	0	229		7,438	55.7%	6.8%	34.5%	0.0%	3.1%	0.0%	100.0%
2016					111		7,387					1.5%		
2016 (Revised)	4,102	578	2,622	0	231		7,533	54.5%	7.7%	34.8%	0.0%	3.1%	0.0%	100.0%

South West Wales Town Centre Audits and Health Checks

Centre - Tenby	LA – Pembrokeshire Coast National Park Authority	Current Status – Tier 2 Local Service and Tourism Centre
Centre Description	Historic walled centre extending from town wall towards the harbour and beach, with predominantly narrow streets and limited vehicle access. Popular tourist destination.	
Catchment Area	The household survey indicates residents in the immediate vicinity (Zone 6) visit the centre for shopping on a regular basis, with more than half visiting at least once a week. The centre also attracts shoppers from Zones 4, 5 and 7 but on a much less frequent basis.	
Use of the Centre	Local residents primarily visit the centre to undertake non-food shopping, although the food shopping and financial services offer are also important. For those coming from further away the non-food offer is important but respondents are also attracted by the leisure uses available, including the cafes/restaurants and as part of a day out.	

Summary of Previous Health Checks and Studies

Wales Spatial Plan (Update)	2008	Key Settlement with role as a service, employment and tourism function. Good example of recent regeneration.
Pembrokeshire County Wide Retail Study (GVA)	March 2010	Town Centre consists of 171 units providing 21,326 sq m of ground floor floorspace. Of this 7 units (4.1%) are vacant in June 2009, with 71 (41.5%) in comparison use, 12 (7.0%) in convenience and 81 (47.4%) in service uses. In terms of floorspace vacancies higher at 13.0%. Centre is largest within the PCNPA area and its role of centre as tourist destination is noted, with a high proportion of retail service uses. Also high number of independent retailers. Retail ranking is above that of some higher order centres and current retailer interest noted. Properties in good state of repair and investment made in public realm. Currently vibrant within an attractive historic setting but has potential to serve a catchment beyond its immediate local area.
PCC Retail Survey Data	October 2011	Very little overall change in terms of the unit numbers and types of units since the 2009 survey.

Annual Monitoring Report	2014	AMR 2014 has shown Tenby to have a vacancy rate of 5.2% compared with a national average of 11.9%
Annual Monitoring Report	2015	AMR 2015 has shown Tenby to have a vacancy rate of 3.5% compared with a national average of 9.5%. This represents a decrease in vacancy from the previous year.
Annual Monitoring Report	2016	AMR 2016 has shown Tenby to have a vacancy rate of 4.0% compared with a national average of 13.2%. This represents a small increase in vacancy from the previous year.

2016 Health Check

Use	No of Units	% of Units 100%			Floorspace		% Floorspace (A uses gross)
		All	A Class uses		Gross (building footprint)	Net *	
Convenience (A1)	22	11.8%	11.9%		2,647	1,232	12.0%
Comparison (A1)	72	38.7%	38.9%		8,226	5,280	37.2%
Retail Service (A1)	11	5.9%	5.9%		1,509	505	6.8%
Financial/Business (A2)	17	9.1%	9.2%		1,859	N/a	8.4%
Food and Drink (A3)	46	24.7%	24.9%		5,619	N/a	25.4%
Miscellaneous/Other	1	0.5%			75	N/a	0.3%
Vacant (A Class)	17	9.1%	9.2%		2,165	1,536	9.8%
Total	186	100%	100%		22,100		100%

** Includes estimates of net sales areas for individual A1 stores where appropriate but excludes A2, A3 and Misc as net floorspace information missing from LPA data.*

Multiple Retailers (9+ shops)	Total = 29	Key Independents
Including: Greggs Holland & Barratt Londis Tesco Express	Boots New Look Poundland Shoe Zone WH Smith	T P Hughes Department Store Variety of Art Galleries

Community Facilities	Facilities within the town centre include a number of churches and halls but the restricted space means the majority of facilities for residents are located outside the walled town centre.
Visitor Provision	Town centre is close to the harbour, Tenby castle and beaches. Shops include a number of art galleries and confectionary shops as well as a good range of food and drink outlets.

Long Term Vacancy	Vacancies within the town are below average and long term vacancies are not a major issue. The only area where units appear to have been vacant since 2011 and are not in the process of redevelopment/refurbishment is in Sergeants Lane (ref TBY398 – 407), although it is understood that these units were not previously in A1 use.
Changes in Centre over time	The period 2006 – 2009 saw a decrease in the number of A Class units within the centre but numbers have improved slightly since 2011. Vacancies were relatively static between 2013 and 2015 but appear to have temporarily increased as there are a number of redevelopment and refurbishments under

	way. The number of national multiples is good and includes recent investment by Poundland and Premier Inn.
Mix of Uses	The mix of uses within the centre has been relatively consistent over the last five years and reflects the needs of both the local resident population and visitors, although there has been a small move away from comparison uses towards convenience. Comparison and food & drink unit numbers and floorspace are above average, whilst convenience presence is slightly below, reflecting the location of the main foodstore (Sainsbury's) just outside the centre.

Accessibility	Tenby has three main approaches from the surrounding area and also benefits from a railway station. The town therefore has good accessibility from the surrounding area for both residents and visitors. However within the historic centre some areas have restricted pavement widths and changes in levels.
Car Parking provision	Parking provision within the town centre is limited but there is a range of on and off-street parking provision available nearby and, for day visitors, by North Beach. The use of the former garage on South Parade has increased parking close to the Town Gate.
Pedestrian Flows	Pedestrian flows are highest within the walled centre and to/from the main parking areas ie St Georges Street, St Julians Street, High Street, Church Street and South Parade by Five Arches.
Conclusions on Accessibility	Centre has relatively good transport links from its expected catchment area which includes resident and visitor accommodation. A range of parking options are available close to the centre and the choice has been improved by the opening of the surface car park on South Parade. Local access may be difficult though in some parts due to restricted pavement widths and changes in levels.

Retailer Demand	Carter Jonas' assessment of retailer requirements has only identified Aldi as having a specific requirement for the town.
Customer Views	The attractive environment and in particular the harbour and beaches are highly rated by respondents. The range of non-food shops and availability of good pubs/cafés/restaurants are also important draws. Local residents would like to see more national multiples in the centre and all visitors would like more/better parking, although levels of dissatisfaction are generally low.
Crime	Statistics from UKCrimeStats.com indicate 457 crimes in the last year (July 2015 to June 2016) for a daytime population of 3,956 in postcode sector SA70 7. This represents a rate of 11.6% with 1.5% of all crimes relating to shoplifting and 44.0% to Anti-Social Behaviour. The area has a slightly higher rate of crime than the one other postal sector in SA70 and it is higher than the national crime rate for England and Wales of 9.7%. However, safety and security are not a concern for respondents to the household survey.
Environmental Quality	The historic, coastal setting provides an attractive backdrop to the centre and environment is of a generally high quality and attractive. Restricted access for vehicles assists pedestrian movement but pavements are not always adequate for the numbers of visitors.

Recent Investment	The Royal Gatehouse Hotel has been redeveloped to provide a large retail unit (Poundland) and hotel (Premier Inn) with onsite parking. Further redevelopment

	on South Parade/Upper Park Road has recently been completed and a number of other vacant units are in the process of being refurbished.
Development Opportunities	Royal Gatehouse site and former garage on South Parade have been redeveloped, the latter as a public car park for the town centre. A number of other sites being redeveloped within the centre or close by and permission has been granted for the change of use of the fort on St Catherine's Island to a visitor attraction.

Current View of Centre

Strengths	Attractive historic/coastal setting Mix of national multiples and independent businesses Offer that appeals to local residents and visitors.	Weaknesses/Gaps	Limited potential for larger retail units Narrow pavements in places Steep slopes/steps
Opportunities	High numbers of tourists	Threats	Congestion during peak tourist times Inadequate parking
Conclusions on Health of Centre	Tenby is the largest centre in the National Park and provides important retail and service facilities for both the local population and visitors. The in-centre convenience offer is supplemented by a Sainsbury's store just outside the town centre boundary and the recently opened out-of-centre Co-op convenience store at Heywood Lane. Units within the historic centre are generally well occupied and there is evidence of recent investment on the periphery of the centre including at White Lion Street where Poundland and Premier Inn have recently opened, improving the representation of national multiples in the town and improving facilities for tourists. Vacancy rates have been falling over recent years and limited vacancies, the arrival of new retailers and on-going investment suggest the retail market is strong and the centre is healthy.		

Tenby

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2006	91	20	86	0	7	n/a	204	44.6%	9.8%	42.2%	0.0%	3.4%		100.0%
June 2009	71	12	81	0	7		171	41.5%	7.0%	47.4%	0.0%	4.1%		100.0%
October 2011														
2011					14		182					7.7%		
2013					10		180					5.6%		
2014	77	18	75	0	12	n/a	182	42.3%	9.9%	41.2%	0.0%	6.6%		100.0%
2015 (Revised)	77	19	76		10	n/a	182	42.3%	10.4%	41.8%	0.0%	5.5%		100.0%
2016					7		182					3.8%		
2016 (Revised)	72	22	74	1	17	7	193	37.3%	11.4%	38.3%	0.5%	8.8%	3.6%	100.0%

Year	Floorspace of Units (sq m gross)							% of Floorspace						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2006	9,955	2,839	9,712	0	373		22,879	43.5%	12.4%	42.4%	0.0%	1.6%		100.0%
June 2009	7,165	1,345	10,043	0	2,773		21,326	33.6%	6.3%	47.1%	0.0%	13.0%		100.0%
October 2011	8,066	1,376	8,806	0	512		18,760	43.0%	7.3%	46.9%	0.0%	2.7%		100.0%
2011					268		20,772					1.3%		
2013					996		20,689					4.8%		
2014	8,901	2,112	8,740	0	1,082		20,835	42.7%	10.1%	41.9%	0.0%	5.2%		100.0%
2015 (Revised)	8,831	2,333	9,432		1,044		21,640	40.8%	10.8%	43.6%	0.0%	4.8%		100.0%
2016					853		21,197					4.0%		
2016 (Revised)	8,226	2,647	8,987	75	2,165		22,100	37.2%	12.0%	40.7%	0.3%	9.8%		100.0%

APPENDIX 14: HEALTH CHECK ASSESSMENT PROFORMAS: CEREDIGION COUNTY

South West Wales Town Centre Audits and Health Checks

Centre - **Aberaeron**	LA – Ceredigion County Council	Current Status – Urban Service Centre
Centre Description	Coastal town with centre focused along the A487 where the main retail provision is located but extending to include the harbour and river frontage and buildings surrounding Alban Square.	
Catchment Area	The household survey indicates residents in the immediate vicinity (Zone 13) of Aberaeron visit the centre for shopping on a regular basis, with more than half visiting at least once a week and 76% visiting at least monthly. The centre also attracts shoppers from Zone 12 and, to a lesser extent, Zones 11, 14 and 15 visiting on less frequent but regular basis.	
Use of the Centre	Local residents primarily visit the centre to undertake food and non-food shopping. Others from outside the immediate area primarily visit the cafes/restaurants. They also undertake other leisure activities and some non-food shopping. The use of service providers is generally low.	

Summary of Previous Health Checks and Studies

Annual Monitoring Report	2014	Vacancy survey carried out in February 2014 found Aberaeron to have a vacancy rate of 6.9% compared with an average for Ceredigion of 11.9% and a UK average of 13.9% (December 2013).
Annual Monitoring Report	2015	Vacancy survey carried out February 2015 found Aberaeron to have a vacancy rate of 7.8% compared with a Ceredigion average of 9.1% and a UK average of 13.9% (December 2013).
Annual Monitoring Report	2016	Vacancy survey carried out February 2016 found Aberaeron to have a vacancy rate of 10.3% compared with a Ceredigion average of 7.6% and a UK average of 12.3% (June 2015).

2016 Health Check (NB For whole town)

Use	No of Units	% of Units 100%			Floorspace		% Floorspace (A uses gross)
		All	A Class uses		Gross (building footprint)	Net *	
Convenience (A1)	8	8.4%	8.6%		1,245	815	17.2%
Comparison (A1)	34	35.8%	36.6%		5,136	2,465	71.0%
Retail Service (A1)	13	13.7%	14.0%		789	505	10.9%
Financial/Business (A2)	14	14.7%	15.0%		n/a	n/a	n/a
Food and Drink (A3)	21	22.1%	22.6%		n/a	n/a	n/a
Miscellaneous/Other	2	2.1%			n/a	n/a	n/a
Vacant (A Class)	3	3.2%	3.2%		60	20	0.8%
Total	95	100%	100%		7,230		100%

** Includes estimates of net sales areas for individual A1 stores where appropriate but excludes A2, A3 and Misc as net floorspace information missing from LPA data. Vacant floorspace is A1 only.*

Multiple Retailers (9+ shops)	Total = 12	Key Independents
Including: Costcutter Banks x2 Jewsons Boots Lloyds Pharmacy		AM Garden Services Lloyds Motors (Volvo) Owain's Butchers The Harbourmaster

Community Facilities	Doctor's surgery and some provision relating to coastal location but limited.
Visitor Provision	Centre has good range of food & drink outlets and craft and gift shops reflecting the town's popularity as a tourist destination. The variety of independent convenience retailers is also likely to attract visitors.

Long Term Vacancy	Vacancy rates very low, with only one A1 unit currently vacant. Thus there is no issue of long-term vacancies.
Changes in representation and vacancy levels	The five years 2011-2016 has seen relatively little change in the retail offer in the town. The few vacancies in 2011 have either been occupied by new businesses, or the units have been redeveloped to meet current retailer requirements and subsequently re-let.
Mix of Uses	The mix of uses is close to the national average with lower vacancy rates and slightly more financial service uses. However, the floorspace shows above average proportion of comparison provision, reflecting the size of the Jewson's unit.

Accessibility	Aberaeron is located on the A487 at its junction with the A482 and as such benefits from good accessibility from the rural area between Aberystwyth, Cardigan and Lampeter. The centre itself is largely located on the main A487 and thus benefits from good road accessibility, with the main bus stops also located here. Within the centre pedestrian access is good with the area benefitting from being relatively flat and pavements are generally adequate.
Car Parking provision	On-street is available within the centre and is supplemented by additional off-street parking in the form of surface car parks off Market Street and Lower Regent Street. Some is relatively far from the main retail area but is likely to be used by tourists rather than residents undertaking a short shopping trip.

Pedestrian Flows	Pedestrian flows are focused between Market Street south of the car park and along North Road, particularly the west side.
Conclusions on Accessibility	Aberaeron benefits from good accessibility both to and within the centre, helping it achieve its popularity as an important tourist centre in the area. Movement within the centre is generally good despite the through traffic.

Retailer Demand	Carter Jonas' assessment of retailer requirements has not identified any specific retailer requirement for the town. However, this is may reflect the fact that the majority of occupiers would be independent traders.
Customer Views	The centre is generally liked for its attractive environment and the harbour. Its traditional offer and good range of non-food shops and cafes/restaurants are also liked. Very few however consider the food store provision to be a draw. Nearly three-quarters of respondents do not think there are any specific improvements needed in the centre, although nearly 10% would like to see more/better parking, including the local residents.
Crime	Statistics from UKCrimeStats.com indicate 116 crimes in the last year (July 2015 – June 2016) for a daytime population of 3,233 in postcode sector SA46 0. This represents a rate of 3.6%, with 3.4% of all crimes relating to shoplifting and 47.4% to Anti-Social Behaviour. This is very low compared with the national crime rate for England and Wales of 9.7%.
Environmental Quality	The town offers a high quality environment benefitting from its harbour location and the presence of Alban Square which provides an unusual green open space within the centre. The buildings are generally very well maintained and attractive and through traffic is managed so that it does not detract significantly.

Development Opportunities	No sites are allocated for development in the LDP.

Current View of Centre

Strengths	Popular and well known tourist destination Quality environment Harbour location County Council offices	Weaknesses/Gaps	Through traffic Limited grocery offer Few vacancies
Opportunities		Threats	Loss of provision for local catchment
Conclusions on Health of Centre	Aberaeron is an attractive and successful tourist town that also meets the daily shopping needs of the local population. It is healthy with a good mix of units and services and vacancies are low. The food & drink offer has a strong reputation in its own right and complements the retail draw. Maintaining the balance between local and tourist provision is important for the long term, year-round health of the centre.		

Aberaeron

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2011 (A1 uses only)	30	8	10	n/a	4	n/a	52	57.7%	15.4%	19.2%	n/a	7.7%	n/a	100.0%
2016	34	8	48	2	3	2	97	35.1%	8.2%	49.5%	2.1%	3.1%	2.1%	100.0%

Year	Floorspace of Units (sq m gross)							% of Floorspace						
	Comparison	Convenience	A1 Service	Other	Vacant A1 Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2011 (A1 uses only)	2,940	1,291	614	n/a	215	n/a	5,060	58.1%	25.5%	12.1%	n/a	4.2%	n/a	100.0%
2016	5,136	1,245	789	n/a	60	n/a	7,230	71.0%	17.2%	10.9%	n/a	0.8%	n/a	100.0%

South West Wales Town Centre Audits and Health Checks

Centre -**Aberystwyth**	LA – Ceredigion County Council	Current Status – Urban Service Centre

Centre Description	Strategic coastal and university town with extensive town centre. The historic centre comprises a number of roads located between the railway station and the sea front, with more recent development located on either side of the railway line. National multiples are concentrated along Great Darkgate Street in the older shopping area and in the larger units near the Station.
Catchment Area	The household survey indicates Aberystwyth's main catchment comprises Zones 14, 15 and 16, with around three-quarters of respondents visiting the centre at least once a week. Monthly visits are more likely from Zone 13, with less frequent visits seen from Zone 12.
Use of the Centre	Food and non-food shopping are the main draws for residents in the primary catchment, with non-food shopping the greater draw from more distant areas. The centre is also an important place of employment for those from the wider area, whilst the restaurant/cafes, public services and financial services are also important attractors.



Summary of Previous Health Checks and Studies

CACI Aberystwyth Retail Planning Study	March 2007	Aberystwyth is currently failing to meet the needs of its shoppers threatening its vitality and viability. The centre has good provision of financial and leisure services but its retail sector lacks strong anchors or clusters and lacks differentiation. Despite this trading conditions appear good suggesting there is an opportunity to reshape the retail pitch to create a more vibrant centre.
CCC Retail Topic Paper	December 2011	Aberystwyth is failing to meet the needs of its shoppers which is particularly pertinent given its 'captive' resident catchment. Provision made to meet identified convenience and comparison need but need to address the general lack of distinctiveness noted. Suggested this could be done by consolidating the retail core area and promoting other areas for comparison goods led purposes.
Annual Monitoring Report	2014	Vacancy Survey carried out February 2014 found Aberystwyth to have a vacancy rate of 7.7% compared with a Ceredigion average of 11.9% and a UK average of 13.9% (December 2013). Within the Primary Retail Frontages, the proportion of retail uses varies from between 57% to 89%; while it's Secondary Frontages vary between 23% and 85%. However overall the Primary Shopping Frontage target of 75% is only narrowly missed at 74%. The Secondary Shopping Frontages target of 50% is exceeded with Aberystwyth having 60% retail uses. Footfall surveys have been conducted in Aberystwyth annually since 2012. Since the first survey a small increase in footfall was recorded in the majority of locations within Aberystwyth.
Annual Monitoring Report	2015	Vacancy survey carried out February 2015 found Aberystwyth to have a vacancy rate of 2.3% compared with a Ceredigion average of 9.1% and a UK average of 13.9% (December 2013). Secondary retail frontages, are operating within the limits that policy allows, however primary retail frontages are not performing as desired and are below the previous year's %. However, when taken as a whole the situation is more positive, with Aberystwyth's Primary Shopping Frontages only narrowly missing the 75% target at 70%. The Secondary Shopping Frontages exceed the 50% target, with 52% retail uses. Footfall surveys have been conducted in Aberystwyth annually since 2012. Since the first survey a small increase in footfall was recorded in the majority of locations within Aberystwyth.
Annual Monitoring Report	2016	Vacancy survey carried out February 2016 found Aberystwyth to have a vacancy rate of 4.3% compared with a Ceredigion average of 7.6% and a UK average of 12.3% (June 2015). Within the Primary Frontages, the proportion of retail uses is 74% slightly below the policy target of 75%. The individual frontages vary between 88.9% and 57.1%. The proportion of retail in the Secondary Frontages is 51.9% exceeding the target of 50%, with individual frontages varying between 84.6% and 26.7%. The most recent footfall surveys (November 2015) show similar footfall to previous years.

2016 Health Check

Use	No of Units	% of Units 100%			Net Floorspace *	% Floorspace (A1 uses net)
		All	A Class uses			
Convenience (A1)	37	10.0%	10.1%		4,600	16.8%
Comparison (A1)	125	33.9%	34.2%		18,388	67.2%
Retail Service (A1)	44	11.9%	12.1%		2,878	10.5%
Financial/Business (A2)	44	11.9%	12.1%		n/a	
Food and Drink (A3)	78	21.1%	21.4%		n/a	
Miscellaneous/Other	4	1.1%			n/a	
Vacant (A Class)	37	10.0%	10.1%		1,506	5.5%
Total	369	100%	100%		27,372	100%

** Includes estimates of net sales areas for individual A1 stores where appropriate but excludes A2, A3 and Misc as floorspace missing from LPA data. Vacant floorspace is A1 only*

Multiple Retailers (9+ shops)		Total = 84 in TC (96 All)	Key Independents
Including: Co-op Holland & Barrett Iceland Lidl Tesco Express Banks x 4 Costa Coffee Starbucks	Animal Argos Boots Clarks Matalan Waterstones White Stuff		Charlie's Hardware Inkwells

Community Facilities	Aberystwyth contains large number of community service offices, medical and leisure facilities. This is supplemented by the University offer.
Visitor Provision	The town centre adjoins the sea front and pier and thus the town centre offer includes a wide range of food and drink outlets aimed at the visitor trade. The Ceredigion Museum is also located in the centre. The retail offer includes a number of outlets likely to be of interest to visitors but majority of units are not geared to the tourist sector.

Long Term Vacancy	There are very few units that have remained vacant from 2011 until 2016 and overall vacancies are below average. What vacancies there are tend to be concentrated in a few secondary and tertiary areas such as Eastgate, Terrace Road and Queen's Road. In the latter there is some evidence of changes of use from A1 to non-retail uses since 2011.
Changes in representation and vacancy levels	Vacancies in the town centre have declined since 2011, as has the number of comparison units. In contrast the convenience offer has increased, along with the A1 retail service offer. National multiples presence is good with new occupiers replacing the few that have left. Tesco and Marks & Spencer are due to open shortly.
Mix of Uses	The centre has a good mix of uses, national multiples and independents and discounter and mainstream retailers. The overall mix of uses is similar to the national average and different operators provide for the various elements of the market, namely residents, visitors and students.

Accessibility	Aberystwyth is located on the A487 which provides north/south access along the coast and the A44 which runs east/west. As such road access is good from an extensive rural hinterland. The town is also well served by public transport having a relatively large bus station located adjacent to the railway station within the town centre. Within the centre pedestrian access is generally good, with widened pavements provided in a number of locations.
Car Parking provision	Car parking is provided both on street and in a number of car parks within the centre. There is also a Park & Ride service into the centre from a car park on St Brieuc Boulevard.
Pedestrian Flows	CCC information on pedestrian footfall indicates the greatest number of pedestrians on Great Darkgate Street (2,044 in 2015), followed by Terrace Road North (1,892), Terrace Road South (1,674), Sgwar Owain Glyndwr (1,232 and 1,012) and Chalybeate Street (1,124).
Conclusions on Accessibility	Aberystwyth benefits from good accessibility by road and rail and is the focus of the area's bus services, with both the bus and rail stations located within the town centre. Car parking is provided both on-street and in off-street car parking and supplemented by a Park & Ride service. Within the centre pedestrian access is generally good.

Retailer Demand	Carter Jonas' assessment of retailer requirements has identified five retailer requirements for Aberystwyth. Of these four (Ponden Home, Pavers, Warren James Jewellers and Maplin Electronics) require A1 space of between 1,700 sq ft and 5,000 sq ft. The final requirement is for Frankie & Benny's who require between 3,700 and 8,000 sq ft of A3 space.
Customer Views	The centre is generally liked for its attractive environment, its compactness, the good range of non-food shops and the beach. There are relatively high levels of dissatisfaction with the centre however, particularly from respondents in the immediate area. More, cheaper and better parking and more non-food/national multiples are wanted. Improved accessibility by road and public transport is mentioned by respondents from the wider area.
Crime	Statistics from UKCrimeStats.com indicate 1,708 crimes in the last year (July 2015 – June 2016) for a combined daytime population of 11,469 in postcode sectors SY23 1 and SY23 2. This represents a rate of 14.9%, with 6.4% of all crimes relating to shoplifting and 35.4% to Anti-Social Behaviour. These areas have the highest rates of crime of the 5 postal sectors in SY23 and are above the national average crime rate for England and Wales of 9.7%. However the centre also had the highest number of respondents citing that safety and security as one of the main reasons for visiting the centre (8).
Environmental Quality	Aberystwyth town centre covers a relatively wide area and has been developed over different time periods. As a result the overall quality of the environment varies between areas and individual buildings. Overall however the quality of the street environment is good, and many buildings are attractive and in a good state of repair. However, in some locations there is a clear need for further investment.

Development Opportunities	The main development site within the centre is currently being developed for Tesco and Marks & Spencer. Tesco opened on 24th November 2016, followed and Marks & Spencer is due to open early 2017. Planning permission has also been granted for a new Aldi store at Park Avenue on the edge of the town centre.

Current View of Centre

Strengths	Good range of shops & services Large student population Tourist draw Extensive catchment Good accessibility Range of independents & multiples	Weaknesses/Gaps	Separation of retail areas Parking close to older retail areas
Opportunities	Successful vote for BID Marks & Spencer/Tesco opening	Threats	Changes in footfall New shopping areas failing to generate linked trips
Conclusions on Health of Centre	Aberystwyth is an attractive, historic town which serves an extensive population but also benefits from an established tourist trade. It is also has a large student population. As a result the centre has a diverse offer with a good range of national multiples and independents and further demand for space is confirmed. The development of larger retail units near the station has increased the number of national multiples represented in the town, strengthening the overall offer and ensuring an extensive trade draw. The development of the in-centre Tesco (opened 24th November 2016) and Marks & Spencer (opening 2017) will further strengthen the centre and can be expected to increase footfall. However, the development will also increase the current physical divide between the larger, modern retail units located around the railway station and the older historic shopping area centred around Great Darkgate Street and Terrace Street. This means the links between the two areas are important if the centre is to maximise the overall benefits of the new development. It is also likely to lead to some changes within the older part of the centre as demand for space closer to the new development may improve, for instance on Chalybeate Street and the southern part of Terrace Street, with the shopping areas closer to the sea front becoming more tourist and leisure orientated. Improved accessibility to and within the centre would also improve visitor satisfaction and the proposed Bus and Rail Park & Ride being proposed at Bow Street is likely to assist with this.		

Aberystwyth

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A1 Class	Vacant Other	Total	Comparison	Convenience	A1 Service	Other	Vacant A Class	Vacant Other	Total
2011 (A1 Town Centre)	137	31	34	4	29		235	58.3%	13.2%	14.5%	1.7%	12.3%		100.0%
2016 (A1 Town Centre)	125	37	44	4	22		232	53.9%	15.9%	19.0%	1.7%	9.5%		100.0%
2016 A Class Uses (Town Centre)	125	37	166	4	22	15	369	33.9%	10.0%	45.0%	1.1%	6.0%	4.1%	100.0%
2011 All A1 Uses	143	37	35	4	30		249	57.4%	14.9%	14.1%	1.6%	12.0%		100.0%
2016 All A1 Uses	132	43	49	6	23		253	52.2%	17.0%	19.4%	2.4%	9.1%		100.0%
2016 All A Class Uses	132	43	181	6	23	16	401	32.9%	10.7%	45.1%	1.5%	5.7%	4.0%	100.0%

Year	Floorspace of Units (net)							% of Floorspace						
	Comparison	Convenience	A1 Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	A1 Service	Other	Vacant A Class	Vacant Other	Total
2011 (A1 Town Centre)	19,041	3,605	n/a	n/a	n/a	n/a	22,646	84.1%	15.9%	n/a	n/a	n/a		100.0%
2016 (A1 Town Centre)	18,388	4,600	2,878	n/a	1,506	n/a	27,372	67.2%	16.8%	10.5%	n/a	5.5%		100.0%
2016 A Class Uses (Town Centre)														
2011 All A1 Uses	26,871	8,975	n/a	n/a	n/a	n/a	35,846	75.0%	25.0%	n/a	n/a	n/a		100.0%
2016 All A1 Uses	28,118	9,970	n/a	n/a	1,506	n/a	39,594	71.0%	25.2%	n/a	n/a	3.8%		100.0%
2016 All A Class Uses														

South West Wales Town Centre Audits and Health Checks

Centre - **Cardigan**	LA – Ceredigion County Council	Current Status – Urban Service Centre
Centre Description	Historic centre with the main street extending northwards from the castle and additional retail provision provided along the side roads. Development to the west of the main street is constrained by the topography and changes in levels.	
Catchment Area	The household survey indicates that Cardigan town centre is regularly and frequently visited by the residents of Zones 9 and 10, with people in Zone 11 visiting less frequently. However visits from further afield tend to be infrequent.	
Use of the Centre	The town centre is primarily visited for food shopping particularly by the residents of Zones 10, 9 and 13, the latter reflecting the limited provision in Aberaeron. It is an important non-food shopping centre for its main catchment but also attracts shoppers from the whole of the coastal area from Zone 8 through to Zone 16, albeit on an infrequent basis. The financial and public services available are an important draw locally as are trips linked to employment, Visitors from further afield also visit the cafes and restaurants.	

Summary of Previous Health Checks and Studies

CACI Cardigan and Lampeter Retail Needs Planning Study	November 2008	Cardigan town centre serves the retail needs of its residential catchment. The town is vibrant with a diverse mix of local businesses, which add to the town's unique character. The retail units are maintained fairly well with the condition of the shop fronts and canopies generally of relatively high quality and the Cardigan Townscape Heritage Initiative (THI) has aided the conservation of the town's unique architectural landscape. The health check for Cardigan presents no significant evidence of a need for new floorspace. There are only 9 vacant units in Cardigan town centre and these are largely transitional, reflecting the relative economic prosperity of Cardigan and thus, its strong vitality and viability.
CCC Retail Topic Paper	December 2011	Cardigan is considered to have a good mix of units, with small independent traders dominating the retail provision. It is these independent retailers that create the unique character of a town centre and contribute to its continuing viability and vitality. These retailers operate alongside recognised multiple retailers to create a vital and viable town centre.
Annual Monitoring Report	2014	Vacancy Survey carried out February 2014 found Cardigan to have a vacancy rate of 16.2% compared with a Ceredigion average of 11.9% and a UK average of 13.9% (December 2013), suggesting some concerns. Within the Primary Retail Frontages, the proportion of retail uses varies from between 76% to 68%; while it's Secondary Frontages vary between 80% and 40%. However overall the Primary Shopping Frontage target of 75% is only narrowly missed at 72%. The Secondary Shopping Frontages target of 50% is exceeded with Cardigan having 59.9% retail uses.
Annual Monitoring Report	2015	Vacancy survey carried out February 2015 found Cardigan to have a vacancy rate of 9.8% compared with a Ceredigion average of 9.1% and a UK average of 13.9% (December 2013). Secondary retail frontages, are operating within the limits that policy allows, however primary retail frontages are not performing as desired and are below the previous year's %. However, when taken as a whole the situation is more positive, with Cardigan's Primary Shopping Frontages only narrowly missing the 75% target at 70.6% respectively. The Secondary Shopping Frontages exceed both exceed the 50% target, with 62.8% retail uses.
Annual Monitoring Report	2016	Vacancy survey carried out February 2016 found Cardigan to have a vacancy rate of 10.8% compared with a Ceredigion average of 7.6% and a UK average of UK (June 2015). Within the Primary Frontages, the proportion of retail uses is 76% slightly exceeding the policy target of 75%. The proportion of retail in the Secondary Frontages is 61.8% again exceeding the target of 50%, with individual frontages varying between 90.9% and 40%.

2016 Health Check (For Town as a whole)

Use	No of Units	% of Units 100%			Net Floorspace*	% Floorspace (A uses gross)
		All	A Class uses			
Convenience (A1)	16	7.1%	7.3%		4,711	25.0%
Comparison (A1)	89	39.7%	40.8%			59.9%
Retail Service (A1)	25	11.2%	11.5%		1,473	7.8%
Financial/Business (A2)	29	12.9%	13.3%		n/a	
Food and Drink (A3)	35	15.6%	16.1%		n/a	
Miscellaneous/Other	6	2.7%			n/a	
Vacant (A Class)	24	10.7%	11.0%		1,380	7.3%
Total	224	100%	100%		18,855	100%

** Includes estimates of net sales areas for individual A1 stores where appropriate but excludes A2, A3 and Misc as floorspace details missing from LPA data.*

Multiple Retailers (9+ shops)		Total = 36	Key Independents
Including: Aldi Tesco Banks x4	Boots Dorothy Perkins Original Factory Shop Specsavers WH Smith		Market

Community Facilities	Centre includes a number of regional offices, Council facilities and leisure and sports facilities.
Visitor Provision	The number and range of A3 uses reflects visitor demand and a number of the retail outlets would clearly interest tourists. However, specific tourist provision is limited.

Long Term Vacancy	A total of 7 units that were vacant in 2011 remain vacant in 2016 (although it is not known if they have been let in the intervening period). There is no information available to suggest these are concentrated in a particular area, but a concentration of local charity shops is evident on Priory Street.
Changes in representation and vacancy levels	Although vacancy rates have fallen slightly since 2011 and the number of comparison and service uses has increased, the centre does not appear to have improved as much as might be expected. The closure of much of the Teifi Shopping Centre within the primary shopping area exemplifies this.
Mix of Uses	The mix of uses is much as would be expected for the size and role of the centre. However, the centre lacks the higher end retailers, with those offering a more discounted product range and charity shops clearly in evidence.

Accessibility	The centre benefits from good accessibility from the surrounding area being located off the A487. However the river restricts access from the south. Within the centre the changes in levels on the west side of the town result in sometimes difficult pedestrian access, not helped by a lack of pavements in some key locations. Pavement widths are better along Main Street but traffic levels restrict free movement. Accessibility from the Greenfield Square/Guildhall car park has also been reduced by the closure of the lower entrance to the Teifi shopping centre.

Car Parking provision	Car parking is provided both on-street and in a number of off-street car parks located on the edge of the town centre.
Pedestrian Flows	The highest pedestrian flows were observed on Main Street north of the Guildhall and market. Footfall south of this was also reasonable but was low within the market area itself.
Conclusions on Accessibility	The topography and relatively large size of the centre clearly reduces the accessibility of the centre as does the location of the car parks on the edge of the centre. However, even allowing for this footfall seemed lower than expected when visited.

Retailer Demand	Carter Jonas' assessment of retailer requirements has identified just one retailer requirement for the town for Edinburgh Woollen Mill. They require between 2,000 and 5,000 sq ft of space.
Customer Views	The centre is generally liked for its proximity to home by those living locally and for its attractive environment. The range of non-food shops is considered to be good by those from more distant areas but local residents would like to see a greater comparison offer including more national multiples and improved/cheaper parking.
Crime	Statistics from UKCrimeStats.com indicate 572 crimes in the last year (July 2015 – June 2016) for a daytime population of 5,775 in postcode sector SA43 1. This represents a rate of 9.9%, with 2.4% of all crimes relating to shoplifting and 42.0% to Anti-Social Behaviour. The area has the highest rate of crime of the 3 postal sectors in SA43 but it is close to the national average rate of 9.7% in England and Wales.
Environmental Quality	The environmental quality of the centre is mixed, with the areas around the castle being of a high standard, as is the general street scene on Main Street. However some of the secondary frontages include properties in a poor state of repair. The location of the car parks also means that views of the less attractive rear elevations of buildings are visible, which does detract from the overall visual impression of the centre.

Development Opportunities	There are no allocated sites for retail development within the centre but access roads have been constructed to the proposed Sainsbury's site on the outskirts of the centre, although it is understood this scheme is now unlikely to proceed.

Current View of Centre

Strengths	Castle and river enhance setting Tourist trade Market	Weaknesses/Gaps	Lack of higher order retailers Number of vacant units
Opportunities		Threats	

Conclusions on Health of Centre	Cardigan is an attractive, historic centre which benefits from the central location of the castle to provide a clear identity and draw, as well as a relatively extensive catchment area. The overall mix of units and vacancies is close to the national average, and the centre appears to be healthy, although the overall offer and variety is limited with a strong discount orientation. However, the current levels of vacancy and limited demand for new psace makes it vulnerable to further closures, particularly of the national multiples.

Cardigan (exc Market)

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A1 Class	Vacant A Other	Total	Comparison	Convenience	Service	Other	Vacant A1 Class	Vacant A Other	Total
2011 (A1 uses)	82	18	19		22		141	58.2%	12.8%	13.5%	n/a	15.6%	n/a	100.0%
2016 (A1 Uses)	89	16	25		20		150	59.3%	10.7%	16.7%	n/a	13.3%	n/a	100.0%
2016 All A Class Uses	89	16	89	6	20	4	224	39.7%	7.1%	39.7%	2.7%	8.9%	1.8%	100.0%

Year	Floorspace of Units (net)							% of Floorspace						
	Comparison	Convenience	Service	Other	Vacant A1 Class	Vacant A Other	Total	Comparison	Convenience	A1 Service	Other	Vacant A1 Class	Vacant A Other	Total
2011 (A1 uses)	6,720	3,512	780		664		11,676	57.6%	30.1%	6.7%		5.7%		100.0%
2016 (A1 Uses)	11,291	4,711	1,119		1,230		18,351	61.5%	25.7%	6.1%		6.7%		100.0%
2016 All A Class Uses	11,291	4,711	2,843	258	1,230	n/a	20,333	55.5%	23.2%	14.0%	1.3%	6.0%		100.0%

South West Wales Town Centre Audits and Health Checks

Centre - **Lampeter**	LA – Ceredigion County Council	Current Status – Urban Service Centre
Centre Description	Traditional university town with centre focused around main road junction of A475 and A482.	
Catchment Area	The household survey indicates Lampeter has a localised catchment area with only the residents of Zone 12 using the town centre on a frequent basis. However these visits are frequent, with 78% visiting at least once a week. Visitors from elsewhere in the study area tend to visit monthly or less often, although some trade is known to come to the town from areas of Carmarthenshire to the east.	
Use of the Centre	Local residents primarily visit the centre to undertake food shopping. The centre is also important as a non-food shopping destination, as a financial and public service centre and for the cafes/restaurants available there.	

Summary of Previous Health Checks and Studies

CACI Cardigan and Lampeter Retail Needs Planning Study	November 2008	Town centre serves the retail needs of its catchment. Town has good range and diversity of independent retails which creates the distinct character of the town, which is supported by the number of historic buildings. Mix of non-core retail uses contributes to its vitality and viability and only 3 vacant units identified. Retail units are fairly well maintained with high quality appearances and good streetscapes but inadequate parking provision. Comparison with benchmark average suggests town has under-representation of grocery/convenience provision and absence of any leisure or household goods multiples, but strong representation in the health & beauty, electrical goods and non-core retail categories. Fortnightly market is important as it supports local producers and suppliers.
CCC Retail Topic Paper	December 2011	Lampeter currently has a good mix of units, with small independent traders dominating the retail provision. It is these independent retailers that create the unique character of a town centre and contribute to its continuing viability and vitality. These

		retailers operate alongside recognised multiple retailers to create vital and viable town centres. Identified need for 624 sq m net comparison floorspace by 2007, 511 sq m by 2012 and 352 sq m by 2017. In addition need for 882 sq m 839 sq m and 733 sq m of bulky goods floorspace. Convenience needs assessed as 624 sq m net by 2007, 851-1,013 sq m by 2012 and 949 – 1,289 sq m by 2017.
NLP Household and Street Surveys and Implications	October 2012	Survey confirms that the extent of Lampeter's main convenience catchment area is relatively constrained, with most trade coming from the immediate area ie SA48 7 and SA48 8. The foodstores are a major reason for people visiting the town but other stores and centres are also used regularly. Tourist trade is relatively limited, even during the main holiday season.
Annual Monitoring Report	2014	Vacancy survey carried out February 2014 found Lampeter to have a vacancy rate of 12.4% compared with an average rate of 11.9% in Ceredigion and 13.9% in the UK (December 2013).
Annual Monitoring Report	2015	Vacancy survey carried out February 2015 found Lampeter to have a vacancy rate of 3.9% compared with an average rate of 9.1% in Ceredigion and 13.9% in the UK (December 2013).
Annual Monitoring Report	2016	Vacancy survey carried out February 2016 found Lampeter to have a vacancy rate of 3.0% compared with a Ceredigion average of 7.6% and a UK average of 12.3% (June 2015).

2016 Health Check (For whole town)

Use	No of Units	% of Units 100%			Floorspace		% Floorspace (A uses gross)
		All	A Class uses		Gross (building footprint)	Net *	
Convenience (A1)	12	9.4%	9.7%		4,894	3,503	36.5%
Comparison (A1)	45	35.2%	36.3%		5,952	4,489	44.4%
Retail Service (A1)	17	13.3%	13.7%		1,565	863	11.7%
Financial/Business (A2)	18	14.1%	14.5%		n/a	n/a	n/a
Food and Drink (A3)	20	15.6%	16.1%		n/a	n/a	n/a
Miscellaneous/Other	4	3.1%			n/a	n/a	n/a
Vacant (A Class)	12	9.4%	9.7%		985	617	7.4%
Total	128	100%	100%		13,396	9,472	100%

** Includes estimates of net sales areas for individual A1 stores where appropriate but excludes A2, A3 and Misc as net floorspace information missing from LPA data.*

Multiple Retailers (9+ shops)		Total = 17	Key Independents
Including: Co-op Sainsbury's Spar Banks x4	Boots Get Connected Jewsons Lloyds Pharmacy		Bargain Box D L Williams

Community Facilities	Centre includes a limited number of community facilities including Council offices, a doctor's surgery, sports facilities including a swimming pool and Lampeter Museum.

Visitor Provision	Limited visitor orientated offer and majority of shops closed on Sunday suggesting tourist trade is limited.

Long Term Vacancy	Only one unit (previously occupied by Merlin's Cave) has been identified as being vacant in both 2011 and 2016. Thus there are no major issues with long term vacancies in the centre.
Changes in representation and vacancy levels	Vacancy levels are slightly below average but have increased since 2011. The period has also seen a decline in the number of comparison shops in the centre but an increase in the convenience offer with three new stores opening.
Mix of Uses	Centre has a high proportion of independent retailers. The overall mix shows slightly above average number of Financial services and comparison retail, but food & drink outlets are under-represented.

Accessibility	Lampeter is located at the junction of the A485, A475 and A482 and thus has good accessibility from a large rural area extending eastwards into Carmarthenshire. Within the centre the main roads are of adequate width for the through traffic but have the effect of dividing up the centre. As a result a number of retail uses are located to the rear of the main streets, with pedestrian access sometimes restricted. Along the main roads though pedestrian access is good.
Car Parking provision	Car parking provided in two main car parks to the rear of the main retail areas, with on-street parking also available. Access to the car parks is not ideal and overall parking is limited.
Pedestrian Flows	Unable to comment as quiet at time of visit.
Conclusions on Accessibility	The centre benefits from good accessibility from the surrounding area. Within the centre the pedestrian provision along the main retail frontages is good but access to/from the car parks and some of the retail units to the rear is less good reflecting the historic nature of the centre.

Retailer Demand	Carter Jonas' assessment of retailer requirements has not identified any specific retailer requirement for the town. However, this is may reflect the fact that the majority of occupiers would be independent traders.
Customer Views	The centre is generally liked with a range of reasons given, such as its range of non-food shops, its traditional and compact feel and its good food stores. A bigger or better range of non-food shops, including more national multiples would be welcomed, but satisfaction levels with the centre were generally good.
Crime	Statistics from UKCrimeStats.com indicate 249 crimes in the last year (July 2015 – June 2016) for a daytime population of 5,050 in postcode sector SA48 7. This represents a rate of 4.9%, with 7.2% of all crimes relating to shoplifting and 35.3% to Anti-Social Behaviour. The area has the slightly higher rate of crime of the two postal sectors in SA48 but it is very low compared with the national crime rate for England and Wales of 9.7%.

Environmental Quality	The historic centre and properties within it are generally of a high quality as are the pedestrian routes. However, the location of the car parks and a number of retail units behind the main streets means the less attractive rear elevations of some buildings are visible, which does detract from the overall visual impression of the centre.

Development Opportunities	No sites are allocated for development in the LDP.

Current View of Centre

Strengths	Local population supported by students Easy to identify centre	Weaknesses/Gaps	Limited parking Largest retail unit (Sainsbury's) not visible
Opportunities	Development of food & drink offer	Threats	Closure of key occupiers
Conclusions on Health of Centre	Lampeter is an attractive and generally successful centre offering a good mix of independent retailers and national multiples. It is generally vital and viable and there has been some recent investment particularly in the convenience sector. However, vacancies have been increasing and the number of comparison retailers has declined. The food & drink sector is also under-represented.		

Lampeter

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2011 (A1 only)	53	9	19	1	5	n/a	87	60.9%	10.3%	21.8%	1.1%	5.7%	n/a	100.0%
2016	45	12	55	4	12	0	128	35.2%	9.4%	43.0%	3.1%	9.4%	0.0%	100.0%

Year	Floorspace of Units (sq m gross)							% of Floorspace						
	Comparison	Convenience	A1 Service	Other	Vacant A1 Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A1 Class	Vacant Other	Total
2011 (A1 only)	5,296	4,631	1,247	103	396	n/a	11,673	45.4%	39.7%	10.7%	0.9%	3.4%	n/a	100.0%
2016	5,952	4,894	1,565	n/a	985	n/a	13,396	44.4%	36.5%	11.7%	n/a	7.4%	n/a	100.0%

South West Wales Town Centre Audits and Health Checks

Centre - **Llandysul**	LA – Ceredigion County Council	Current Status – Urban Service Centre
Centre Description	Traditional linear high street in market town, with small amount of additional retail offer along link road to car park. One way traffic system in operation.	
Catchment Area	Centre has rural catchment area that extends into the Carmarthenshire area. Population levels are low but area is remote from larger centres.	
Use of the Centre	Centre not covered by household survey questions specifically, but responses suggest the centre has a limited retail role attracting mainly top-up convenience shopping trips.	

Summary of Previous Health Checks and Studies

Annual Monitoring Report	2014	Vacancy Survey carried out February 2014 found Llandysul to have a vacancy rate of 10.5% compared with a Ceredigion average of 11.9% and a UK average of 13.9% (December 2013).
Annual Monitoring Report	2015	Vacancy survey carried out February 2015 found Llandysul to have a vacancy rate of 14.3% compared with a Ceredigion average of 9.1% and a UK average of 13.9% (December 2013).
Annual Monitoring Report	2016	Vacancy survey carried out February 2016 found Llandysul to have a vacancy rate of 11.9% compared with a Ceredigion average of 7.6% and a UK average of 12.3% (June 2015).

2016 Health Check (For whole town)

Use	No of Units	% of Units 100%			Floorspace		% Floorspace (A1 uses gross)
		All	A Class uses		Gross (building footprint)	Net *	
Convenience (A1)	3		6.3%		1,285	755	55.4%
Comparison (A1)	17		35.4%		220	95	9.5%
Retail Service (A1)	6		12.5%		310	175	13.4%
Financial/Business (A2)	6		12.5%		n/a	n/a	n/a
Food and Drink (A3)	7		14.6%		n/a	n/a	n/a
Miscellaneous/Other	0		0.0%		0	0	0
Vacant (A1 only)	9		18.8%		505	225	21.8%
Total	48		100%		2,320		100%

** Includes estimates of net sales areas for individual A1 stores where appropriate but excludes A2, A3 and Misc as net floorspace missing from LPA data. Vacant floorspace is A1 only*

Multiple Retailers (9+ shops)	Total = 5	Key Independents
Including: Spar Bank Post Office	Boots Lloyds Pharmacy	Arcade

Community Facilities	Centre has reasonable range of facilities including County Office (Contact Point) and sports facilities close to the car park.
Visitor Provision	Centre has little specific provision for visitors but includes number of public houses and good car parking. Majority of shops and businesses closed on Sunday, suggesting very little visitor trade expected.

Long Term Vacancy (% and location)	Centre has seen an increase in vacancies since 2011, although only one retail (Use Class A1) unit appears to have been vacant throughout the period.
Changes in representation and vacancy levels	There have been a number of recent closures in the centre, including banks but the centre retains a reasonable number of national multiples for its size. New openings however have been limited and include two local charity shops, suggesting limited demand for the available units.
Mix of Uses	Centre offers a range of facilities and shopping with financial services still above average despite closures. The Retail services, convenience and comparison shopping offer is also good.

Accessibility	Llandysul is located close to the junctions of the B4476, B4624, B4336 and A486 and thus has good access from a wide rural area. The opening of the by-pass will have reduced through traffic and may have reduced passing trade slightly. However, with few alternatives this is unlikely to have had a major effect and the removal of some traffic will have had some benefits. Within the centre a one way system operates, providing good access to both the retail area and the car park. Pedestrian accessibility from the car park is good and pavements generally adequate within the centre, although there are a few 'pinch points'.
Car Parking provision	Good parking provision including on-street and off-street, with a surface car park located at a lower level near the river and accessed off the one way

	system.
Pedestrian Flows	Not able to comment as centre very quiet at time of visit.
Conclusions on Accessibility	Llandysul has good accessibility from its immediate hinterland and generally within the centre.

Retailer Demand	Carter Jonas' assessment of retailer requirements has not identified any specific retailer requirement for the town. However, this is may reflect the fact that the majority of occupiers would be independent traders.
Customer Views	Not available
Crime	Statistics from UKCrimeStats.com indicate 179 crimes in the last year (July 2015 – June 2016) for a daytime population of 3,829 in postcode sector SA44 4 which includes Llandysul. This represents a rate of 4.7%, with 1.1% of all crimes relating to shoplifting and 43.6% to Anti-Social Behaviour. The area has the highest rate of crime of the 3 postal sectors in SA44 but it is very low compared with the national crime rate for England and Wales of 9.7%.
Environmental Quality	The centre is generally of a high environmental quality. Through traffic and the number of vacant properties does detract from this and a number of properties are in need of investment.

Development Opportunities	No sites are allocated for development in the LDP.

Current View of Centre

Strengths	Presence of national multiples Good number of shops Good car parking	Weaknesses/Gaps	Restricted catchment Limited retail offer between car park and centre
Opportunities	Central focus on main street Improved leisure service offer Llandysul Through School opening	Threats	Further closures of key services Relatively dispersed nature of commercial uses
Conclusions on Health of Centre	Llandysul is a market town that provides for the retail and other community needs of its rural hinterland. The centre currently seems to be in transition with a number of changes having happened recently, but the overall mix remains good and it is currently considered to be relatively healthy. However, vacancies are above average and demand from occupiers appears to be limited. It is therefore vulnerable to further closures of the national multiples for whom this location is likely to be marginal. Its location and offer means tourist trade is likely to be limited and there may be a need to reduce the size of the centre in the future. The opening of the Llandysul Through School may improve footfall within the centre and counter any reduction in trade seen as a result of the by-pass opening, but the increased distance from the centre may counter this. As a result the draw of the centre is likely to remain limited.		

Llandysul

Year	Number of Units								% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total		Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2011 (A1 uses only)	19	3	5	n/a	2	n/a	29		65.5%	10.3%	17.2%	n/a	6.9%	n/a	100.0%
2016	17	3	19	0	9	0	48		35.4%	6.3%	39.6%	0.0%	18.8%	0.0%	100.0%

Year	Floorspace of Units (sq m gross)								% of Floorspace						
	Comparison	Convenience	A1 Service	Other	Vacant A1 Class	Vacant Other	Total		Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2011 (A1 uses only)	1,430	220	270	n/a	155	n/a	2,075		68.9%	10.6%	13.0%	n/a	7.5%	n/a	100.0%
2016	1,285	220	n/a	n/a	n/a	n/a	1,505		85.4%	14.6%	n/a	n/a	n/a	n/a	100.0%

South West Wales Town Centre Audits and Health Checks

Centre - **Tregaron**	LA – Ceredigion County Council	Current Status – Urban Service Centre

Centre Description	Small historic centre focused around the junction of the A485 and B4343 and the slightly separate main square resulting in a linear centre but with commercial uses interspersed with residential.
Catchment Area	The catchment area for Tregaron is very localised and visits are relatively infrequent. Only a third of respondents within the immediate area (Zone 14) are visiting the centre at least once a month.
Use of the Centre	The centre has a food and non-food shopping function for residents in its immediate hinterland with the cafes/restaurants attracting visits from slightly further afield. Leisure activities also attract a number of visitors.

Summary of Previous Health Checks and Studies

Annual Monitoring Report	2014	Vacancy survey carried out February 2014 found Tregaron to have a vacancy rate of 15.4% compared with a Ceredigion average of 11.9% and a UK average of 13.9% (December 2013). Therefore, some concerns raised.
Annual Monitoring Report	2015	Vacancy survey carried out February 2015 found Tregaron to have a vacancy rate of 16.7% compared with a Ceredigion average of 9.1% and a UK average of 13.9% (December 2013). Therefore, some concerns raised.
Annual Monitoring Report	2016	Vacancy survey carried out February 2016 found Tregaron to have a vacancy rate of 20.0% compared with a Ceredigion average of 7.6% and a UK average of UK (June 2015).

2016 Health Check (For town)

Use	No of Units	% of Units 100%			Floorspace		% Floorspace (A uses gross)
		All	A Class uses		Gross (building footprint)	Net *	
Convenience (A1)	5		15.6%		705	465	21.5%
Comparison (A1)	7		21.9%		2,120	870	64.5%
Retail Service (A1)	4		12.5%		220	135	6.7%
Financial/Business (A2)	6		18.8%		n/a	n/a	
Food and Drink (A3)	3		9.4%		n/a	n/a	
Miscellaneous/Other	0		0.0%		0	0	0.0%
Vacant (A Class)	7		21.9%		240	125	7.3%
Total	32		100%		3,285	1,595	100%

** Floorspace is for A1 uses only as A2, A3 and Misc floorspace information missing from LPA data.*

Multiple Retailers (9+ shops)	Total = 5	Key Independents
Including: Spar Post Office Banks x2		Rhiannon Gold Centre

Community Facilities	Town has a range of sports and leisure facilities and a doctor's surgery. The permanent library closed in 2015 and town is now served by a mobile service.
Visitor Provision	The Red Kite Centre and Rhiannon Gold provide some tourist interest in the centre throughout the year, with regular horse harness races also likely to attract visitors. The Talbot Hotel is key visitor facility.

Long Term Vacancy	Recent information suggests vacancies within the town as a whole and within the defined centre are above average. One of the retail units has been vacant since 2011, whilst another was used for B1 purposes in the intervening period but is vacant again.
Changes in representation and vacancy levels	The centre has seen a decline in its comparison offer since 2015 although a small fruit and veg shop has opened during the same period.
Mix of Uses	Tregaron is an important service centre for its catchment area with good convenience and financial services provision. Occupiers are primarily independents but the centre retains two national banks.

Accessibility	Tregaron is located at the junction of the A485 and B4343 and thus has good access from a wide rural area. The main square is located a short distance from this junction with the main car park beyond. Within the centre, both vehicle and pedestrian access is reasonable despite the historic nature of the centre, although some pavements are narrow and there is potential for pedestrian/vehicle conflicts in the vicinity of The Square.
Car Parking provision	A new surface car park is provided off the B4343 to supplement that in The Square. There is also on-street parking throughout the centre, although in places this results in narrow road widths.

Pedestrian Flows	The location of key retail and service occupiers means that pedestrian movement will primarily be along the B4343 between the shops and The Square. The pedestrian link to the new car park is also likely to be well used when the centre is busy.
Conclusions on Accessibility	Accessibility to the centre and within it is reasonable, although on-street parking can restrict the width of the carriageway in places. Pedestrian access is generally good by the main retail outlets.

Retailer Demand	Carter Jonas' assessment of retailer requirements has not identified any specific retailer requirement for the town. However, this is may reflect the fact that the majority of occupiers would be independent traders.
Customer Views	The traditional centre and attractive environment are clearly liked by those visiting the centre followed by its quietness. There were no major dislikes about the centre, although some local residents would like to see more non-food, national multiples in the centre.
Crime	Statistics from UKCrimeStats.com indicate 166 crimes in the last year (July 2015 – June 2016) for a daytime population of 3,682 in postcode sector SY25 6. This represents a rate of 4.5%, with 0.6% of all crimes relating to shoplifting and 36.1% to Anti-Social Behaviour. This is very low compared with the national crime rate for England and Wales of 9.7%.
Environmental Quality	The environmental quality of the centre is good with building generally in a good state of repair. Some road and pavement surfaces have been upgraded but not all. On-street parking and the resulting congestion that can result on the narrow roads does however detract from the character of the area.

Development Opportunities	No sites are allocated for development in the LDP.

Current View of Centre

Strengths	Distinct visitor offer Important service role	Weaknesses/Gaps	Limited catchment population
Opportunities	Central location of hotel Good car parking provision	Threats	Growth of larger centres Closures of key services
Conclusions on Health of Centre	Tregaron is an attractive centre and one which appears to be relatively healthy. However, it has relatively high levels of vacancy and a decreasing comparison offer making it vulnerable to closures of the national multiples for whom this location is likely to be marginal. Its location and offer means some tourist trade can be expected and the new car park seeks to provide the necessary facilities to meet their requirements. However, the resulting trade would be expected to be limited and is unlikely to be sufficient to support businesses in isolation.		

Tregaron

Year	Number of Units							% of Units						
	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2011 (A1 uses only)	10	4	3	n/a	4	n/a	21	47.6%	19.0%	14.3%	n/a	19.0%	n/a	100.0%
2016	7	5	13	0	7	0	32	21.9%	15.6%	40.6%	0.0%	21.9%	0.0%	100.0%

Year	Floorspace of Units (sq m gross)							% of Floorspace						
	Comparison	Convenience	Service (A1 only)	Other	Vacant A1 Class	Vacant Other	Total	Comparison	Convenience	Service	Other	Vacant A Class	Vacant Other	Total
2011 (A1 uses only)	2,225	675	130	n/a	135	n/a	3,165	70.3%	21.3%	4.1%	n/a	4.3%	n/a	100.0%
2016	2,120	705	220	n/a	240	na	3,285	64.5%	21.5%	6.7%	n/a	7.3%	n/a	100.0%