

APPENDIX 2: Baseline data (Part 1)

Please note that this is a working document and will be updated periodically, and is split over 3 documents.

Topics:

1. Population
2. Human health
3. Education and skills
4. Transport
5. Social Fabric – including housing, affordability, Welsh language, crime,
6. Economy – including activity, employment, labour demand, business, GVA, agriculture, tourism and recreation, communications.
7. Climatic factors – including resource efficiency, climate change scenarios
8. Air quality
9. Material Assets – including waste, minerals and aggregates, ecological footprint, energy.
10. Water – quality and quantity, flooding
11. Soil – including contaminated land, agricultural land.
12. Biodiversity, Fauna and Flora – protected sites and condition.
13. Cultural Heritage, Historic Environment and Landscape – including listed buildings, conservation areas, landscape.

1. Population

Population facts and figures

The population of Pembrokeshire, excluding areas in the National Park, was 91,589 at the Census in 2001. The population of the entire County at the last Census (2011) was 122,439. This has increased from 114,131 which is 3.9% of the Wales population of 2,903,085 in 2001 and 3,063,500 in 2011 (ONS, 2011).

Welsh Government Population and Household Projections (from PCC LDP AMR)

- The implications of the 2011-based Local Authority Population and Household Projections for Wales, which reflect the data from the 2011 Census, were discussed in the first AMR. The latest 2014-based population and household projections were released on 23rd March 2017.
- The LDP housing requirement is derived from the Welsh Government's (WG) 2008-based household projections. These were a starting point for the figures, but the LDP makes provision for 1,605 dwellings more than the 5,724 units required, to allow

for choice, flexibility and renewal of the existing housing stock and for non-take up of sites. Both the 2011 and 2014-based population projections had a higher base population than the 2006 and 2008 based population projections as a result of data from the 2011 census being used, rather than the 2001 census.

- The following graphs show the differences between the 2006, 2008, 2011 and 2014 population and household projections for Pembrokeshire:

Figure 1: Projected Population

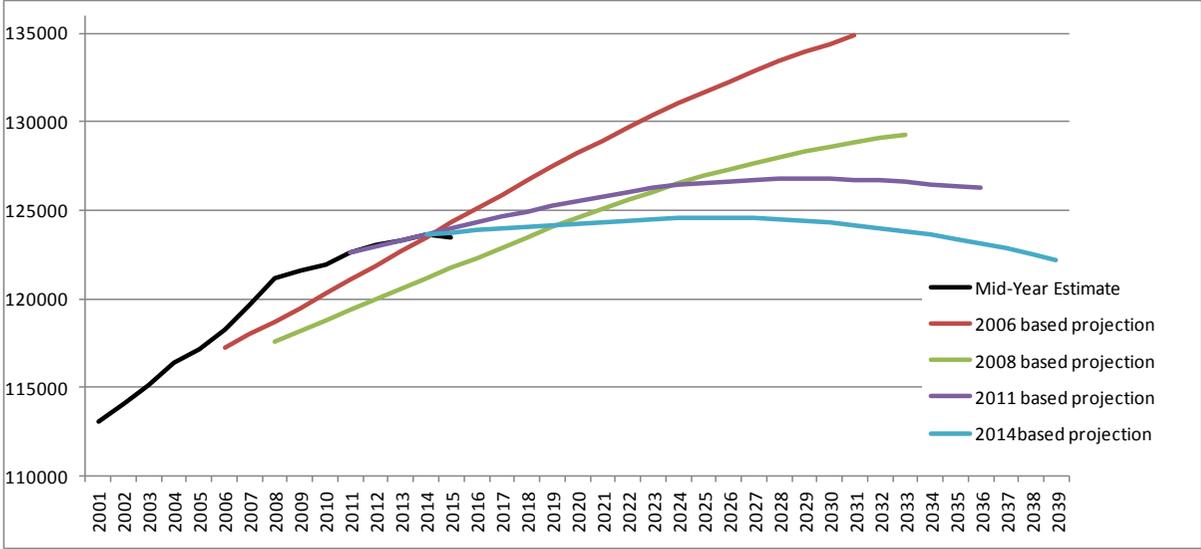
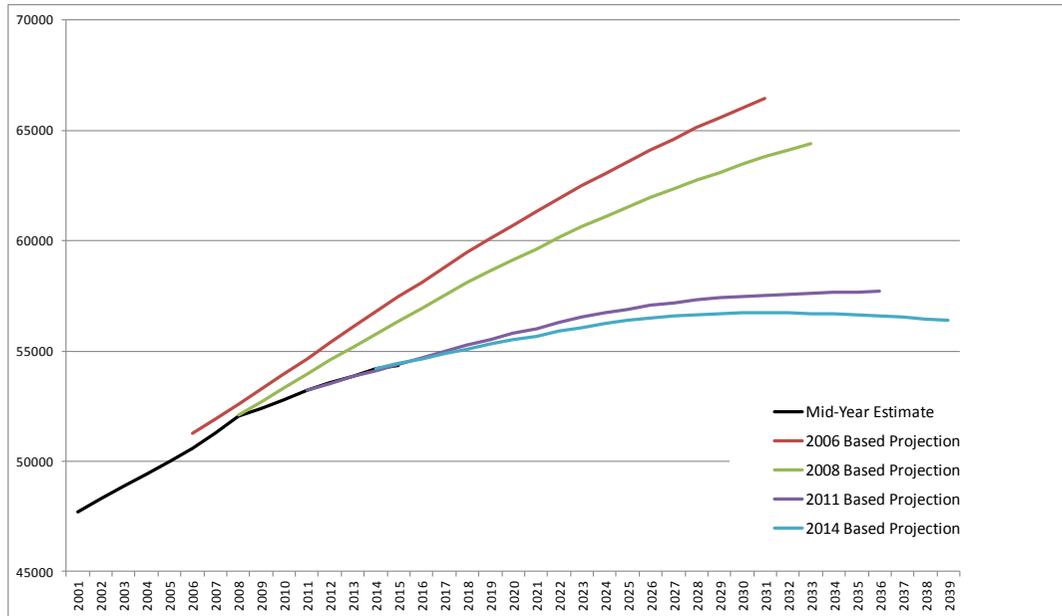


Figure 2: Projected Households



The following table shows the differing components in the projections:

Table 1: Projection Component 2017-18	2006 Based	2008 Based	2011 Based	2014 Based
Births	1317	1250	1306	1198
Deaths	1380	1283	1338	1352
General Fertility Rate ¹	68.92401	67.54566	68.34118	63.56802
Crude Death Rate ²	10.96247	10.44015	10.73655	10.9098
NetMigrInt	785	594	299	268
NetMigrOvs	65	11	54	-17

¹ number of live births per 1,000 women aged 15 to 44

² number of deaths per 1,000 population

Comparison of the projections

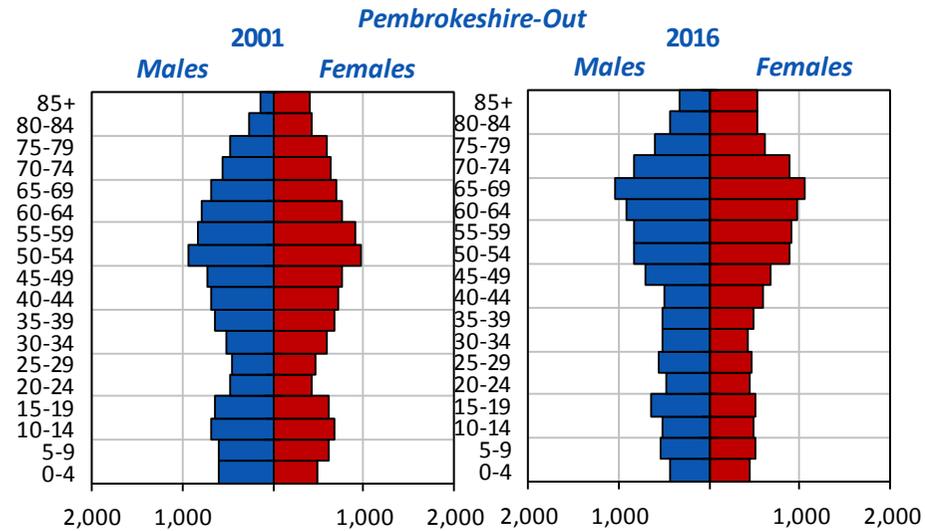
- In summary the lower population forecast in the 2014 based projection, compared with the previous projections are due to fewer births and more deaths and lower expected numbers of net migrants (due to lower numbers in the previous five years).
- It is also worth noting that the four population projections produced by the Welsh Government (2006 based, 2008 based, 2011 based and 2014 based each show lower forecast rates of population growth than the previous (see chart).
- Population will grow until 2029 but then decline.
- In 2033 there will be more people aged over 65 and fewer young people – so a need for more housing for older people.
- Households will be smaller in size (more 1 person) and there will be more households than now.

During the preparation of LDP 2, there will be a need for the Authority to assess carefully the implications of the most recent projections in determining its housing land provision.

Population profile

Between 2001 and 2016, the proportion of the population aged 65+ living in Pembrokeshire-Out 2.8 increased from 18% to 24%. Whilst this is closely aligned to the Unitary Authority in 2016 (25%), it is higher than Wales (20%) but lower than PCNP (30%) (Figure 3). Whilst the 2016 MYE for Pembrokeshire-Out records a younger age profile than the National Park, it indicates an older and more rapidly ageing population age profile than evidenced at national level (Demographic Study, Edge Analytics, 2018).

Population age profile 2016 (Figure 3)



Indicator	2016 MYE			
	Pembrokeshire Out	Pembrokeshire Coast National Park	Pembrokeshire UA	Wales
Percentage 65+	24%	30%	25%	20%
Percentage 80+	6%	8%	7%	5%
OAD	40%	53%	42%	32%
Median Age	46	53	47	42

OAD = Old Age Dependency Ratio
 (Population Aged 65+/Population Aged 15-64)

Source: Edge Analytics Demographic Study, 2018
 Pembrokeshire Out is the area excluding the Pembrokeshire Coast National Park Authority

Pembrokeshire has a population of 122,439 (2011 Census); though it should be noted the County’s population can increase by 100% as a result of summer tourism. The population density is 0.8 people per hectare.

Table 2: Age distribution of Pembrokeshire’s population, 2001 and 2011

POPULATION (Number and Percentage) BY AGE, 2001 & 2011				
Age Band	2001		2011	
	Number	%	Number	%
0 - 15	23,394	20.5	22,077	18
16 to 74	80,763	70.8	88,049	71.9
75 and over	9,974	8.7	12,313	10.1

Source: 2011 Census

Under the official WG 2014-based population projection for Pembrokeshire UA, Pembrokeshire-3.8Out and PCNP, the 16–64 age group represents the greatest proportion of the total population in both 2017 and 2033 for each area, however it is the older 65+ age groups that are expected to experience the greatest increase (Table 3).

Table 3

Age Group	2017			2033		
	Pembrokeshire UA	Pembrokeshire Out	PCNP	Pembrokeshire UA	Pembrokeshire Out	PCNP
0–15	21,195	18,212	3,013	20,034	17,770	2,423
16–64	71,417	59,224	12,169	63,985	55,066	8,971
65+	31,344	24,373	6,982	39,803	32,061	7,590
TOTAL	123,957	101,810	22,165	123,822	104,898	18,983

Source: Edge Analytics Demographic Study, 2018

Life Expectancy

Table 4: Life expectancy in Pembrokeshire and Wales

		Male	Female
1995-1997	Pembrokeshire	74.3	79.7
	Wales	74.0	79.2
1997-1998	Pembrokeshire	74.5	79.6
	Wales	74.5	79.5
1998-2000	Pembrokeshire	74.9	79.7
	Wales	74.8	79.7
2002-2004	Pembrokeshire	76.0	80.5
	Wales	75.8	80.3
2003	Pembrokeshire	76.1	80.5
	Wales	75.8	80.3
2011	Pembrokeshire	78.8	82.7
	Wales	78.0	82.2

Source: ONS, 2011

Population Future Trend

Life expectancy in Pembrokeshire is continuously higher for both males and females than the national average and is increasing at the same rate.

Sources

ONS, 2001 Census (Life Expectancy at Birth, 2002-2004), and 2011 Census

Ethnicity – 2001 and 2011

Table 5: Ethnicity in 2001 and 2011

	2001		2011	
	Pembs	Wales	Pembs	Wales
White	99.1	97.9	98.1	
Mixed/multiple ethnic groups	0.3	0.6	0.6	
Asian or Asian British	0.3	0.9	1.0	
Black/African/Caribbean/ Black British	0.1	0.3	0.1	
Other ethnic group	0.2	0.4	0.2	

% from Ethnic Minority Group	0.9	2.0	1.9	
Percentage Identifying themselves as Welsh	13	14		3.7
Percentage of people born outside Wales	31.3		33.1	

Data Gaps and Uncertainties

None Identified

Sources

ONS, 2001 Census (Map 49, National SEA of WSP)

ONS, 2001 Census (KSO6A – Ethnic Group and Identification as Welsh)

ONS, 2011 Census <https://www.nomisweb.co.uk/reports/localarea?compare=1946157391>

<http://www.neighbourhood.statistics.gov.uk/dissemination/LeadTableView.do?a=3&b=276866&c=pembrokeshire&d=13&e=15&g=415946&i=1001x1003x1004&m=0&r=1&s=1216908611988&enc=1&dsFamilyId=15>

Nomisweb.co.uk <https://www.nomisweb.co.uk/census/2011/KS201EW/view/1946157391?cols=measures>

Welsh Index of Multiple Deprivation (WIMD)

Pembrokeshire has the 3rd greatest percentage of Lower Super Output Areas (LSOAs) in the most deprived 10% of areas for the Access domain, based on access to key services by bus and/or on foot (Single Needs Assessment, 2012).

Percentage of people living in most deprived areas

The 2014 Welsh Index of Multiple Deprivation is made up of separate measurements into a single number; Income, Employment, Health, Education, Access to Services, Community Safety, Physical Environment and Housing. Rankings are based on the level of deprivation. A rank of one is the most deprived. The Access to Services domain of the WIMD considers access to: a food shop; GP surgery; primary school; post office; public library; leisure centre; NHS dentist; and secondary school.

Previous rankings in 2005 and 2008 were made up of different components and cannot therefore be compared with subsequent rankings.

In 2005 it was made up of separate domains; income (25%), employment (25%), health (15%), education, skills and training (15%), housing (5%), physical environment (5%) and geographical access to services (10%). The table also shows the ranking of the electoral divisions in Wales.

The deprivation scores from the 2008 index can't be compared with those from 2005, but are provided for information. The parts that make up the index are different, and the indexes were worked out in different ways. But even if these changes had not been made, comparisons would still not be valid. An area's score is affected by the scores of every other area; so it is impossible to tell whether a change in score is a real change in the deprivation level of an area, or whether it is due to the scores of other areas going up or down (WAG, 2008).

Table 6: Welsh Index of Multiple Deprivation in Pembrokeshire and Wales

Ward	2005	2005	2008	2014	2014
	Pembs Ranking (1-71)	Welsh Ranking (1-1896)	Welsh Ranking (2008) (1-1896)	Pembs Ranking (of 71)	Welsh Ranking 2014 (of 1909)
Pembroke Dock: Llanion 1	1	55	71	1	67
Pembroke: Monkton	2	76	92	2	80
Haverfordwest: Garth 2	3	200	222	3	104
Milford: West	4	290	372	6	363
Milford: Hubberston 2	5	332	358	4	173
Pembroke: St Mary North	6	350	343	7	411
Haverfordwest: Castle	7	417	441	9	488
Pembroke Dock: Central	8	456	417	5	201
Milford: East	9	536	589	10	508
Pembroke Dock: Pennar 1	10	580	596	8	487

In 2014, of the 10% most deprived Lower Super Output Areas (LSOA) in Wales, 4 are within the Pembrokeshire County Council area. This accounts for 5.6% of those in the local authority and 0.2% of those in Wales.

Table 7: % of LSOA in most deprived area in Pembrokeshire

% of LSOA in most deprived area	2011	2014
10%	4	6
20%	9	8
30%	14	15
50%	39	37

Number of LSOAs = 71

Source: <http://wimd.wales.gov.uk/geography/la/W06000009?lang=en#&min=0&max=20&domain=overall>

The overall methodology used within WIMD 2014 is the same as used for WIMD 2011. The domains have also remained the same. There have been a small number of changes to individual indicators (or the inclusion of new indicators) within the Income, Education, Access to Services, Community Safety, Physical Environment and Housing domains; as well as some technical changes to some of the individual domains.

<https://gov.wales/docs/statistics/2015/150812-wimd-2014-revised-en.pdf>

A ranking system cannot be used to monitor change over time. This is because it is not known whether a change in rank for an area is due to changes in that area itself, or to other areas moving up or down the ranks, changing its position without actual change in the area.

Table 8: Working-age client group - key benefit claimants (February 2007)

	Pembrokeshire (numbers)	Pembrokeshire (%)	Wales (%)
Total claimants	11,720	17.5	19.3
Job seekers	1,360	2.0	2.6
Incapacity benefits	6,640	9.9	11.2

Lone parents	1,290	1.9	2.2
Carers	1,040	1.6	1.4
Others on income related benefits	320	0.5	0.5
Disabled	820	1.2	1.2
Bereaved	240	0.4	0.3

Source: DWP benefit claimants - working age client group

Note: % is a proportion of resident working age people

Sources

Welsh Index of Multiple Deprivation – Local Authority Analysis Revised 8th December 2005

Welsh Index of Multiple Deprivation – 2008

<http://new.wales.gov.uk/topics/statistics/headlines/compendia2008/hdw20080709/?lang=en>

Nomis – www.nomisweb.co.uk

Pembrokeshire is the one of the fifth highest areas in Wales with a larger proportion of housing benefits claimants. This can reflect a combination of low numbers of hours or poorly paid work as well as higher costs of renting

Source: Joseph Rowntree Foundation, Monitoring Poverty and Social Exclusion in Wales, 2015

Migration

Between 2011 and 2016 net migration averaged approximately 390 per year from within the UK and approximately 80 per year from outside the UK between 2012 and 2016³⁴. There is an aging population in Pembrokeshire partly as a result of migration and people are living longer. This may affect the demand for housing for older people.

Table 9: Sources of population change in Pembrokeshire, 2001 - 2005

<i>Pembrokeshire County Council</i>					
		<i>2001/2</i>	<i>2002/3</i>	<i>2003/4</i>	<i>2004/5</i>
Births		1090	1150	1160	1200
Deaths		1350	1380	1330	1420

³ <https://statswales.gov.wales/Catalogue/Population-and-Migration/Migration/Internal/migrationbetweenwalesandrestofuk-by-localauthority-flow-periodofchange>

⁴ <https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Components-of-Change/componentsofpopulationchange-by-localauthority-component>

Natural Change		-260	-230	-180	-210
Internal Migration	In	4460	4440	4210	3870
	Out	3510	3480	3440	3290
	Net	950	960	760	580
International Migration	In	890	660	370	120
(International Passenger Survey)	Out	290	300	60	190
	Net	600	360	310	-70

Source: LHMA (2007)

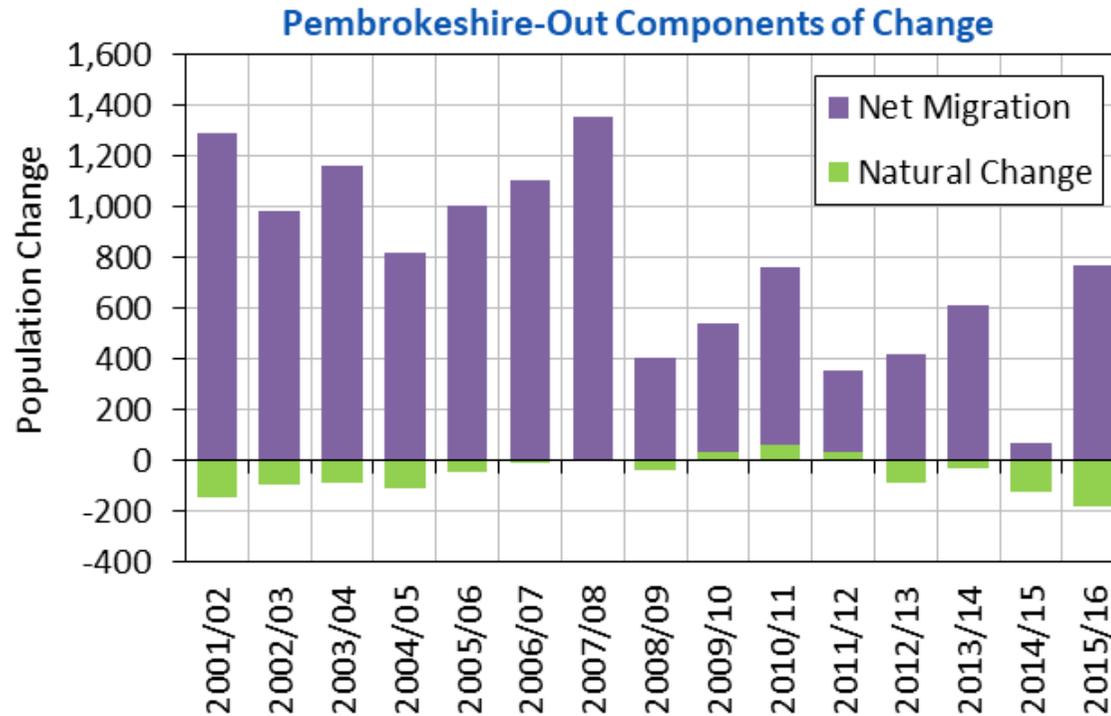
Net migration of 16-24 year olds 1999-2001, Pembrokeshire: -8.5%

Net migration of 25-44 year olds 1999-2001, Pembrokeshire: 2.1%

Welsh average for 16-24 year olds 1999-2001: -1.0%

Welsh average for 25-44 year olds 1999-2001: 0.3%

Pembrokeshire (excluding the PCNPA) components of change 2001/02-2015/16



Source: Edge Analytics Demographic Study, 2018

Trends

Young people are moving out of Pembrokeshire and older/retired people are moving in, causing the population to age and contributing to the expensive housing market.

Sources:

- Pembrokeshire County Council – Local Housing Market Assessment
- Edge Analytics Demographic Study, 2018

Population Issues

- Population Change – projections are lower.
- Aging population.

The LDP should have regard to reducing poverty in line with UK and Welsh strategies. The LDP should have regard to promoting social inclusion and supporting sustainable communities. Planning can be guided by demographic structure such as an ageing population which will require residential care and health services and can also ensure that housing and infrastructure are suitable for any growth or change in populations. Planning should be accessible and inclusive so it reflects the needs of the whole population. The plan should seek to address the issue of Pembrokeshire's ageing population which also links in with encouraging younger people to stay in the County.

2. Human health

Health provision in Pembrokeshire

There are 15 GP practices in Pembrokeshire and 29 pharmacies, mainly located in the main towns.

Withybush hospital in Haverfordwest is the County's only general hospital, healthcare provisions are part of a review by the Hywel Dda University Health Board. There are two community hospitals at Pembroke Dock and Tenby.

Long term illness

A limiting long-term illness covers any long-term illness, health problem or disability that limits daily activities or work. According to data from the 2001 Census, in the whole of Pembrokeshire there were 25,477 people with a long-term illness, which equates to 22.332% of the population of the County.

This compares to in the 2011 Census:

122,439 total

13,970 day to day activities limited a little

13,587 day to day activities limited a lot

97,882 day to day activities not limited

Sixteen percent of people in Pembrokeshire state that they are limited a lot by a health problem/disability (15% in Wales) (Welsh Health Survey, 2015).

Note that the National Survey for Wales was used from 2016 onwards, therefore data before this date (pre April 2016) are not comparable/compatible with data from 2016 onwards.

Table 10: Percentage of population with a long-term limiting illness in 1991 and 2001, and 2011 Pembrokeshire and Wales:

	Pembrokeshire	Wales
1991	14.5%	17.1%
2001	22.3%	23.3%
2011*	22.5%	22.7%

*The question on long term limiting illness in the 2001 census was not the same as the 2011 question, therefore these are not directly comparable, but still offer indicative insights on change over time. The 2011 questions related to whether day to day activities are limited a lot, a little, or not limited. For this purpose, the limited a lot and a little are grouped.

Source

Office for National Statistics – 1991, 2001 and 2011 Census data

<https://statswales.gov.wales/Catalogue/Census/2011/LimitingLongTermIllnessDisability-by-LocalAuthority>

Obesity levels

Table 11: Adults who were overweight or obese⁵ in Pembrokeshire (%)

Year		Observed			Age-standardised
		Male	Female	Person	Person
2003/05	Pembs	61	51	56	55
	Wales	59	49	54	54
2005/06	Pembs	65	51	58	57
	Wales	60	50	55	55
2005/07	Pembs	68	52	60	58
	Wales	61	51	56	56
2007/08	Pembs	64	57	60	59
	Wales	62	52	57	57
2016/17	Pembs			63	
	Wales			59	

Source WAG: <http://wales.gov.uk/topics/statistics/theme/health/health-survey/results/?skip=1&lang=en>

% of adults who were overweight or obese in 2007/08 = 59%, compared with 57% in Wales.
2016/17 onwards not comparable as survey changed (National Survey)

Source: Welsh Health Survey: 2003/05 Local Authority Report, National Assembly for Wales

National Survey for Wales 2016/17

The percentage of respondents, with 0 or 1 healthy behaviours (see below for description)

Pembrokeshire 9%

Wales 10%

⁵ Reported Body Mass Index (BMI) of 25+. BMI is calculated as weight (kg) divided by squared height (m²).

Healthy behaviours:

Not smoking

Healthy weight

Eat 5 fruit or veg

Not drinking above guidelines

Active

Table 12: Lifestyle issues

Lifestyle Issue	2003/05		2005/07		2008/09		10/11		12/13		14/15	
	Pembs (%)	Wales (%)										
Being a smoker	25	27	23	25	21	24	24	23	21	22	16	20
Consuming alcohol above guidelines limit	38	40	31	36	39	45	38	44	37	42	36	40
Binge drinking at least 1 day in last week	16	19	17	20	21	28	22	27	20	26	19	24
Eating 5 or more portions of fruit/vegetables the previous day	43	40	50	46	39	36	38	34	37	33	36	32
Meeting physical activity guidelines in last week	32	29	32	30	34	29	32	30	33	29	33	31
Overweight or obese	56	54	60	56	63	57	56	57	56	58	63	58

Source: Welsh Government Statistics: WHS 2003-2015

<https://gov.wales/docs/statistics/2016/160622-welsh-health-survey-trends-2003-04-04-2015-en.xlsx>

Road collisions & safety

Table 13: Killed or seriously injured casualties in Pembrokeshire and Wales from 1994-2016.

Road collisions (fatal or seriously injured)	1994-1998 average	2001-2004 av	2005-2008 av	2009-2012	2013	2014	2015	2016
Pembrokeshire	90	91	75	68	54	60	61	62
Wales	1,623	1,331	1,153	1,148	1,144	1,263	1,186	975

Source: Road Casualties Wales: 2006, WG and Welsh Transport Statistics

<http://new.wales.gov.uk/topics/statistics/publications/rcw2006/?lang=en>

<http://wales.gov.uk/topics/statistics/publications/transport2009/?lang=en>

<https://gov.wales/docs/statistics/2015/150909-road-safety-2014-en.xls>

Health Issues

- Obesity
- Aging population and impact on health services, access to appropriate housing

The planning system and Local Development Plan can generally only play a minor role in improving health by ensuring policies protect and provide for recreation facilities and encourage healthier alternatives to using cars.

The SA objective therefore takes account of the following key areas:

- Promote healthy living
- Reduce health inequalities
- Encourage walking, cycling and physical activity
- Improve access to open space
- Minimise impacts on health and well-being from road traffic incidents
- Minimise the health impacts from pollution.

3. Education and skills

Number of schools and pupils

In 2016/17 in Pembrokeshire (**including** the National Park area) there were 61 primary schools and 8 secondary schools (one welsh language), 1 special school with post-16 provision.

In 2009 there were 65 primary schools (2009), a reduction of 21 since 1998. In addition there were eight secondary schools, one of which provided a Welsh-medium education. Pembrokeshire College in Haverfordwest is the only further education establishment in the County.

Table 14: Pupil numbers in full time primary and secondary education in Pembrokeshire schools

	2006	2007	2008	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17
Primary	10,229	10,128	10,142	10,344	10,345	10,324	10,328	10,569	10,624	10,730	10,650
Secondary	8,728	8,527	8,361	8,285	8,108	7,999	7,841	7,639	7,327	6,986	6,806
Total	18,957	18,655	18,503	18,629	18,453	18,323	18,169	18,208	17,951	17,716	17,456

Source: Annual statutory school census (PLASC returns)

<https://statswales.gov.wales/Catalogue/Education-and-Skills/Schools-and-Teachers/Schools-Census/Pupil-Level-Annual-School-Census/Pupils/pupil-by-localauthorityregion-typeofschool>

Further and higher education centres

Pembrokeshire College offers full and part time academic and vocational courses. The College provides HND, HNC and degree level education as an Accredited College of the University of Glamorgan.

Adult education facilities

'Learning Pembrokeshire' is Pembrokeshire County Council's programme of adult education. The Council aims to provide a varied range of courses to suit its customers - Pembrokeshire residents and businesses.

Courses are held at many different locations around the County.

Source:

PCC - <https://www.pembrokeshire.gov.uk/our-courses>

Level of Qualifications

Table 15: Percentage of people aged 16-74 years old highest qualification attained⁶ in 2001 and 2011

Highest level attained	Percentage of individuals			
	2001		2011	
	Pembrokeshire	Wales	Pembs	Wales
No Qualifications	31.1	33.0	24.6	25.9
Highest Level 1	16.0	15.5	13.6	13.3
Highest Level 2	22.2	19.8	16.8	15.7
Highest Level 3	6.0	7.0	11.8	12.3
Highest Level 4/5	17.0	17.4	24.8	24.5
Other qualification/level unknown	7.7	7.2	8.45	4.3

Source: Census 2001 and 2011
NOMIS, ONS annual population survey

Education & Skills Issues

- Increase in people attaining level 3 and level 4/5 since the 2001 census.

The plan should have regard to supporting sustainable communities and improve access to services, including education and provide suitable skills training to enable the population to enter meaningful employment.

The LDP can ensure that land is available to provide or policies enable the provision of good quality education facilities are available with opportunities for skills and knowledge development.

The SA objectives should therefore address the issue of low skills in the area, by improving access to education and life-long learning and training opportunities, this will develop a strong skills base for employers. This objective will also contribute towards improving employment opportunities and economic activity, which in turn will improve the quality of life of the population.

⁶ All people aged 16 to 74 who were usually resident in the area at the time of the 2001 Census, whose highest qualification attained:

Level 1: 1+'O' level passes; 1+ CSE/GCSE any grades; NVQ level 1; or Foundation level GNVQ.

Level 2: 5+'O' level passes; 5+ CSE (grade 1's); 5+GCSEs (grades A-C); School Certificate; 1+'A' levels/'AS' levels; NVQ level 2; or Intermediate GNVQ.

Level 3: 2+ 'A' levels; 4+ 'AS' levels; Higher School Certificate; NVQ level 3; or Advanced GNVQ.

Level 4/5 qualifications: First Degree, Higher Degree, NVQ levels 4 and 5; HNC; HND; Qualified Teacher Status; Qualified Medical Doctor; Qualified Dentist; Qualified Nurse; Midwife; or Health Visitor.

4. Transport

Road traffic

Table 16: Volume of traffic on major roads by Unitary Authority (billion vehicle km)

Area	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
<i>Pembrokeshire</i>	0.99	1.01	1.02	1.04	1.07	1.08	1.09	1.08	1.06	1.05	1.04
Carmarthenshire	1.71	1.73	1.75	1.78	1.89	1.94	1.93	1.89	1.86	1.84	1.83
Ceredigion	0.68	0.71	0.71	0.70	0.71	0.73	0.71	0.71	0.70	0.70	0.68
WALES	26.06	26.40	27.07	26.98	27.63	27.99	27.88	27.49	26.98	23.93	26.76

These figures show that there is an annual gradual rise, then gradual reduction from 2009 in volume of traffic, both in Pembrokeshire and through Wales. Traffic in Pembrokeshire accounted for 3.8% of traffic on major roads in Wales in 2012.

Source:

WG, 2018

<https://gov.wales/docs/statistics/2013/130924-monitoring-national-transport-plan-update-2012-en.pdf>

Households without a car

Table 17: The percentage of households without a car or van in Pembrokeshire and other areas (2001 and 2011 census)

	2001	2011
Pembrokeshire	21.7	17.9
Ceredigion	19.5	18.4
Carmarthenshire	23.1	18.8
Wales	26.0	22.9

Source:

Census 2001, 2011, Car or Van table KS17 & KS404EW

<https://www.nomisweb.co.uk/census/2011/KS404EW/view/1946157391?cols=measures>

Travelling to work

Table 18: The method of travel to work used by all employed persons aged 16-74, in the whole of Pembrokeshire and Wales (2001 & 2011):

Method of travel	2001				2011			
	Pembrokeshire		Wales		Pembrokeshire		Wales	
	Number of persons	% of employed persons	Number of persons	% of persons	Number of persons	% of employed persons	Number of persons	% of employed persons
Driving a car or van	25,793	57.45	726,363	61.23	35,649	65.75	918,645	67.37
Passenger in a car or van	3,672	8.18	106,526	8.98	3,434	6.33	92,727	6.80
Underground, metro, light rail, tram					43	0.08	1,175	0.09
Train	169	0.38	14,619	1.23	232	0.43	27,341	2.01
Bus, coach or mini bus	1,353	3.01	62,322	5.25	1,606	2.96	62,903	4.61
Bicycle	364	0.81	16,389	1.38	475	0.88	19,659	1.44
On foot	5,190	11.56	122,732	10.35	6,427	11.85	145,135	10.64
Motorcycle, scooter or moped	332	0.74	8,888	0.75	358	0.66	7,694	0.56
Taxi	199	0.44	5,975	0.50	221	0.41	6,523	0.48
Other	448	1.00	7,119	0.60	512	0.94	8,673	0.64
Work at home	7,377	16.43	115,323	9.72	5,260	9.70	73,140	5.36
Total (all people aged 16-74 in employment)	44,897		1,186,256		54,217		1,363,615	

Census data 2001, 2011, KS15 -Travel to work table, QS701EW

Source:

Census, 2001, 2011

<http://www.neighbourhood.statistics.gov.uk/dissemination/LeadTableView.do?a=3&b=276866&c=pembrokeshire&d=13&e=15&g=415946&i=1001x1003x1004&m=0&r=1&s=1209388884375&enc=1&dsFamilyId=283>

Rail travel & links

Figure 4 indicates the rail infrastructure in Pembrokeshire (red line) and the passenger ferry terminals in the County (blue triangles). Commercial services currently provided by Arriva Trains Wales run approximately every few hours to Milford Haven and Pembroke

Dock and twice a day to Fishguard Harbour on weekdays. The weekend timetable is significantly reduced. The infrastructure also extends to existing/disused large industrial sites at Milford Haven, Waterston and Trecwn.

Figure 4: Rail links and passenger ferry terminals



Passenger numbers with a valid ticket beginning and/or ending their journey at Pembrokeshire train stations in the financial year 2005/06:

Table 19

Station	Passenger numbers					
	2004/05	2005/06	2006/07	2007/08	15/16	16/17
Haverfordwest	114,021	110,023	116,960	127,227	136,346	133,496
Tenby	76,695	75,629	84,598	94,231	118,338	123,314
Milford Haven	39,750	40,899	45,935	51,559	64,034	64,092
Pembroke Dock	30,056	30,439	35,758	41,148	49,362	46,710

Fishguard & Goodwick					19,946	19,600
Fishguard Harbour	28,303	23,873	29,049	24,755	22,646	18,600
Pembroke	21,477	22,513	24,424	25,217	28,446	29,844
Clunderwen	12,709	12,430	14,297	17,439	24,128	24,212
Narberth	10,321	11,140	13,556	15,547	20,922	19,924
Kilgetty	7,794	8,221	9,607	12,103	16,194	15,438
Johnston	6,974	5,197	4,658	4,980	8,704	8,364
Saundersfoot	4,560	4,001	5,081	6,177	7,900	8,384
Penally	4,339	5,289	5,031	4,569	5,444	5,332
Manorbier	4,265	4,009	4,443	5,452	9,648	9,428
Clarbeston Road	3,011	3,210	3,802	4,127	10,138	9,208
Lamphey	2,646	2,552	2,936	4,291	5,732	5,556
.....			
Carmarthen	295,860	294,208	323,233	348,329	419,794	426,890
Cardiff Central	8,403,835	8,357,732	9,126,923	9,875,269	12,744,582	12,534,884
London Waterloo	66,342,182	61,036,093	83,993,314	100,306,690	99,148,388	99,403,096

Future Trend

In Network Rail's investment programme for 2019-2024 Pembrokeshire has not been earmarked as the recipient of any substantial engineering projects, bar minor feasibility studies for diverting traffic away from two open crossings.

Source:

Network Rail – <https://cdn.networkrail.co.uk/wp-content/uploads/2018/02/Wales-Route-Strategic-Plan.pdf>

Office of Rail and Road, Estimates of Station Usage <http://orr.gov.uk/statistics/published-stats/station-usage-estimates>

Sea passenger movements between Pembrokeshire and Ireland

Table 20: Sea Passenger movements to/from Ireland (numbers in thousands):

	2001-05	2006-10	2011	2012	2013	2014	2015	2016
Fishguard	639.6	531	410	367	333	351	327	298
Pembroke Dock	371.6	339.4	313	329	328	322	335	339
WALES	3,452	2,946.2	2,802	2,591	2,615	2,686	2,632	2,564

The figures show that sea travel is declining in terms of numbers of passengers in the County and throughout Wales.

Milford Haven continues to be Wales' busiest port ahead of Holyhead this growth is in part due to the LNG development at Milford Haven.

Source:

Sea passengers <https://statswales.gov.wales/Catalogue/Transport/Sea>

Air transport

Haverfordwest Airport is situated two miles north of Haverfordwest. The airport is mainly used for private aircraft and organised pleasure flights although a specialist air charter service is based there.

Trunk Roads/Length of Highways

The County's highway network comprises the following classifications and distances:

Table 21

Type of road	Length (km)
Trunk Roads	120
County roads - urban	495
County roads - rural	1956

Source: Pembrokeshire County Council

Trunk roads in the County form strategic routes into Pembrokeshire from the east and north:

- The A40(T) (from the County boundary at Whitland towards Fishguard);
- The A477(T) (from the County boundary east of Llanteg to Pembroke Dock);
- The A4076(T) (from Haverfordwest to Milford Haven);
- Part of the A487(T) (between Fishguard and Cardigan).

Sources:

Pembrokeshire County Council - <https://www.pembrokeshire.gov.uk/road-maintenance>

Trunk road agency websites <http://www.southwales-tra.gov.uk/4721>

Transport Issues

- Rurality of the county, use of cars
- Increase in car/van used to travel to work.

The LDP has a key role in transport planning as it is a means of safeguarding the lines of key road improvements / transport infrastructure sites. The LDP can also influence and encourage development near sustainable transport connections and encourage healthier lifestyles through providing for increased exercise, sport and play facilities. The Plan should also ensure compliance with legislation and promote wider public participation.

5. Social Fabric

Housing

Housing Stock

Table 22 and 23: Dwelling stock estimates by tenure in Pembrokeshire and Wales, 2004 and 2016/17

2004	Rented from local authorities	Rented from registered social landlords	Owner-occupied, privately rented and other tenures	Total
Pembrokeshire	5,980	1,932	46,127	54,039
% of total dwelling stock	11%	4%	85%	
Wales	162,276	64,295	1,069,229	1,295,800
% of total dwelling stock	12.5%	5%	82.5%	

2016/17	Rented from Local Authorities	Rented from registered social landlords	Owner occupied, privately rented and other tenures	Total
Pembrokeshire	5,659	2,457	53,998	62,114
% of total dwelling stock	9%	4%	87%	
Wales	87,222	138,596	1,193,553	1,419,371
% of total dwelling stock	6%	10%	84%	

Source:

Stats Wales, Welsh Government: <https://statswales.gov.wales/Catalogue/Housing/Dwelling-Stock-Estimates/dwellingstockestimates-by-localauthority-tenure>

Table 24: Housing Need - All Pembrokeshire – Current Need (2007 & 2012)

C: Current Need		
	2007	2012
1. Existing households in need of alternative housing	3330 ⁷	3270
2. <i>Plus</i> Current non-households in need	198	0
3. <i>Minus</i> cases where they can afford to meet their needs in the market	Nil	0
4. TOTAL CURRENT HOUSING NEED	3528	3270
A: Available Stock to Offset Need		
5. Current occupiers of Affordable Housing in Need	832	402
6. <i>Plus</i> surplus stock	Nil	0
7. <i>Plus</i> committed supply of new affordable housing units	129	73
8. <i>Minus</i> planned units to be taken out of management	97	3
9. <i>Equals</i> Total available stock to meet current need	864	472
10. TOTAL CURRENT NEED	2664	2798
11. <i>Times</i> quota to progressively reduce levels of current need	5%	10%
12. <i>Equals</i> ANNUAL NEED TO REDUCE LEVEL OF CURRENT NEED	133.2	280
N: Newly Arising Need		
13. New Household Formation (gross per annum)	446	564
14. <i>Times</i> proportion of households unable to buy or rent on the market	55.47%	42.8%

⁷ Included 30 persons on the register not currently living in Pembrokeshire

15. Plus existing households falling into need	1376*	1574
16. Minus potential out- migrants unable to afford market housing	Nil	0
17. Plus in-migrants unable to afford market housing	Nil	0
18. Equals newly arising need	1623*	1815
S: Supply of Affordable Housing Units per year		
19. Net Supply of social re-lets	350	435
20. Plus supply of intermediate housing available for re-let / resale at submarket levels	Nil	4
21. Equals Affordable Supply	350	439
NET SHORTFALL OR SURPLUS		
22. Overall shortfall or surplus	1406	1656

Source: Local Housing Market Assessment 2007 and 2012

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

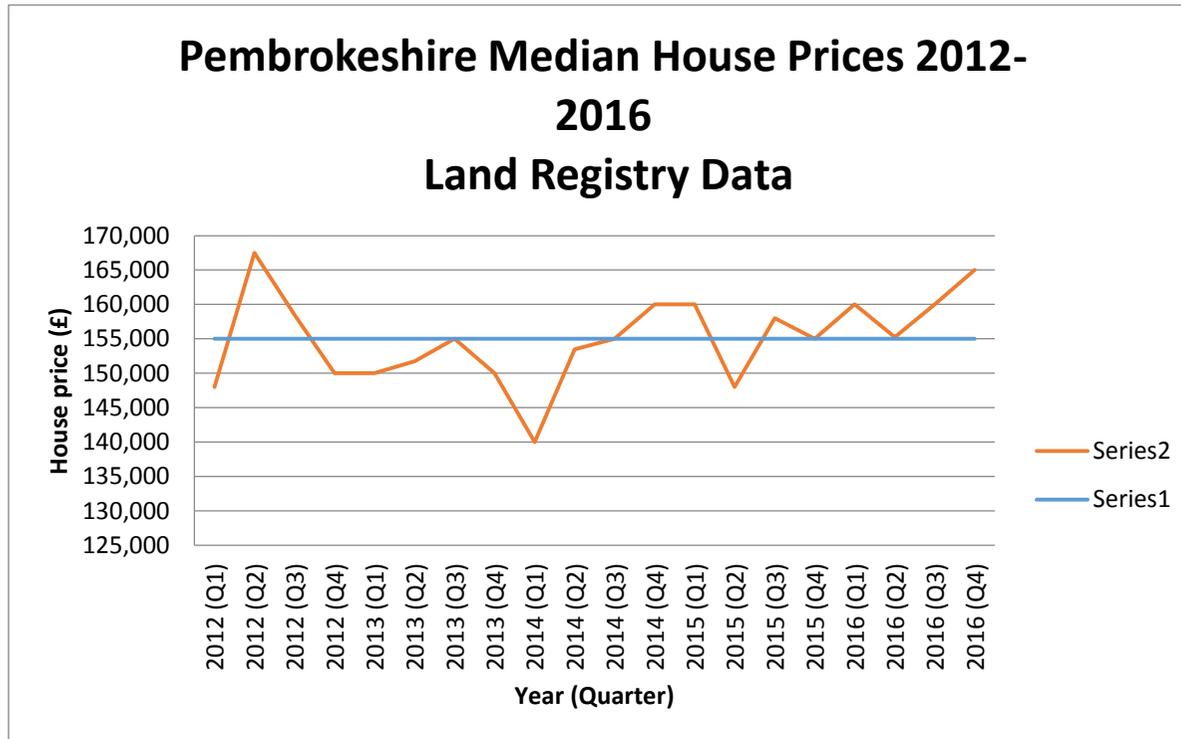
Housing need 2014

Total affordable rented = 1450.4

Low cost home ownership = 288.7

Source LHMA update on housing need per year 2014-2019

House Prices



£155,000 is the base price for 2012 (Series 1)
Median house prices (Series 2)

Source: Land Registry Price Paid (Pembrokeshire County Council Annual monitoring report 2016-2017)
https://www.pembrokeshire.gov.uk/objview.asp?object_id=3783&language=

Table 25: House price indicators

Indicator	2007	2008	2009	2010
Mean	£189,493	£185,340	£177,443	£180,607
Median	£169,000	£160,000	£160,000	£163,750
Upper Quartile Median	£230,000	£222,250	£215,000	£225,000
Lower Quartile Median	£128,475	£123,000	£124,850	£120,000

Source: Local Housing Market Assessment 2012

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

The percentage of second / holiday homes recorded in Pembrokeshire in the 2001 Census was 6.1% which had remained unchanged following the 1991 Census. In the 2011 Census this rose to 6.9% (ONS)

<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/bulletins/2011censusnumberofpeoplewithsecondaddressesinlocalauthoritiesinenglandandwales/2012-10-22>

https://www.nomisweb.co.uk/census/2011/QS417EW/view/1946157391?rows=rural_urban&cols=cell

Affordability

The following table looks at the net household income required to service the mortgage of the most recent lower quartile house price. The calculation has used a 'typical' first time buyer with a 5% deposit looking to repay over 25 years, initially with a fixed interest rate, from a national mortgage lender.

Table 26: Assessment of Affordability Lower Quartile House Price	
Lower Quartile House Price	£120,000.00
95% of Lower Quartile House Price	£114,000.00
5% Deposit	£6,000.00
Interest rate for first 5 years ²	6.44%
Interest rate for remaining term	3.99%
Overall APR	5.40%
First 60 months monthly payment	£765.46
Affordability Calculator Net monthly household income to service mortgage at 30% ³	£2551.53
Net annual household income to service mortgage at 30%	£30,618.36

In looking at the range of earnings for households this would mean that it is only those earning more than £30,000 that are likely to be able to purchase a property.

Household Income shows that the majority of households have an income less than £30,000 as shown below:

Table 27: Income	2007	2008	2009	2010
% households with income < £30K	63.4	63.9	62.4	65.1
% households with income > £30K	36.6	36.1	37.6	34.9

Source: Local Housing Market Assessment 2012

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

Table 28: Affordable Housing – Current Need (comparing 2012 with 2007)

S: Supply of Affordable Housing Units per year		
	2007	2012
<i>19. Net Supply of social re-lets</i>	350	435
<i>20. Plus supply of intermediate housing available for re-let / resale at submarket levels</i>	Nil	4
<i>21. Equals Affordable Supply</i>	350	439
NET SHORTFALL OR SURPLUS		
<i>22. Overall shortfall or surplus</i>	1406	1656

The application of this formulaic approach to assessing housing shortfall surplus indicates the following shortfall of affordable housing over the four areas:

- All Pembrokeshire Shortfall of 1656 units per annum

Sheltered Housing

% Housing Stock: Social Rented = 14.7%

Privately Rented/Owned = 85.3%

Table 45: Social Rented Stock 2012 (LHMA 2012)

Total supply of social housing = 8,085

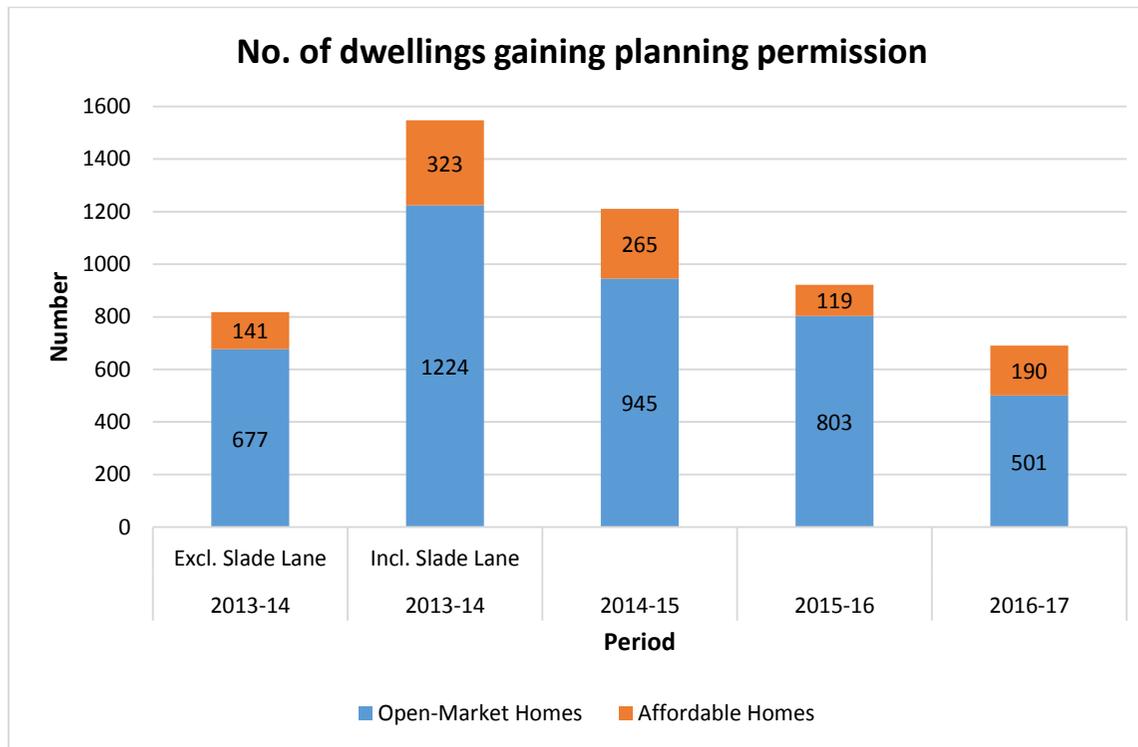
Pembrokeshire County Council = 5,673 (70%)

Pembrokeshire Housing Association = 2,094 (26%)

Cantref = 318 (4%)

Housing Land Availability

5.1 year land supply in the County Council plan area (AMR, 2016-2017)



Source:

Pembrokeshire County Council LDP AMR 2016-2017

Homelessness

Total Outcomes 2016/2017						Total Outcomes
Households assessed as homeless and owed duty to secure - Number (Section 73)	Households assessed as homeless and owed duty to secure – Rate per 10,000 households (Section 73)	Households successfully relieved from Homelessness – Number (Section 73)	Households successfully relieved from Homelessness – Percentage (%) (Section 73)	Households successfully relieved from Homelessness - Rate per 10,000 households (Section 73)		
Wales	10884	81.682187	4500	41.339704	33.767174	28731
Pembrokeshire	342	63.14433	180	52.478134	33.136966	1071

<https://statswales.gov.wales/Catalogue/Housing/Homelessness/reliefofhomelessness-by-area-measure-section73>

There were 266 need to update people awaiting permanent accommodation at the end of April 2008 (Pembrokeshire County Council, 2008). UPDATED figures awaited.

Table 29: Households found to be eligible for assistance, unintentionally homeless and in priority need (2016/17)

	2008		2016/17	
	Pembs	Wales	Pembs	Wales
Household includes dependent child(ren)	261	4,042	18	864
Household member pregnant and no other dependent children	24	723	6	102
Vulnerable household member: old age	25	386		36
Vulnerable household member: Physical disability	46	434	18	210
Vulnerable household member: Mental illness/learning disability	34	679	15	372
Vulnerable household member: other			3	30
Care leaver or person at risk: 18-20 yrs old	8	188	6	69
Young person at risk: 16-17 yrs old	65	985	6	63

Threat/Cases of domestic violence	27	1,310	3	237
Homeless after leaving armed forces	4	43		
A former prisoner who is vulnerable as a result of being held in custody	32	785		84
Household homeless in emergency	5	397		6
Total	537	10,040	78	2,076

Source: Stats Wales

<https://statswales.gov.wales/Catalogue/Housing/Homelessness/Statutory-Homelessness-Prevention-and-Relief/households-found-to-be-eligible-for-assistance-unintentionally-homeless-and-in-priority-need-during-the-year-categories-of-priority-need-by-type-of-household-section-75->

Access to services

The wellbeing assessment was prepared for the Wellbeing Plan required under the Wellbeing of Future Generations (Wales) Act.

<https://www.pembrokeshire.gov.uk/public-services-board/well-being-assessment>

The Wellbeing assessment informed the well-being plan, which was also subject to a public consultation. There is a wealth of information in the wellbeing assessment and the results of the stakeholder engagements.

The Council are currently consulting on a new model of access to services. This is due to close in June 2018.

There are 38% of LSOAs in the most deprived 10% in Wales for the Access to Services domain in 2011 (Welsh Index of Multiple Deprivation (WIMD)). This was 36.6% in the 2014 WIMD.

Pembrokeshire County Council also surveyed its Community Panel on their experiences of accessing key services, and the results are shown here:

Table 30

Accessibility. Very easy or fairly easy	Low difference in rural/urban	High difference in rural/urban
90%+	Local Schools Park / open space Pharmacy	Shopping facilities GP
80% - 89%	Recycling facilities Place of work Sport or Leisure centre	Library Public transport
70% - 79%	Civic amenity site	Council Office Childcare Local Hospital Cultural facility

Source: Pembrokeshire County Council internal report - Access to Services Report 2006

WIMD Wales <http://wimd.wales.gov.uk/geography/la/W06000009?lang=en#&min=0&max=10&domain=services>

Welsh Language

The 2001 and 2011 Censuses asked residents aged over 3 years to state whether they were able to speak Welsh; 110,182 residents in 2001 and 118,392 in 2011:

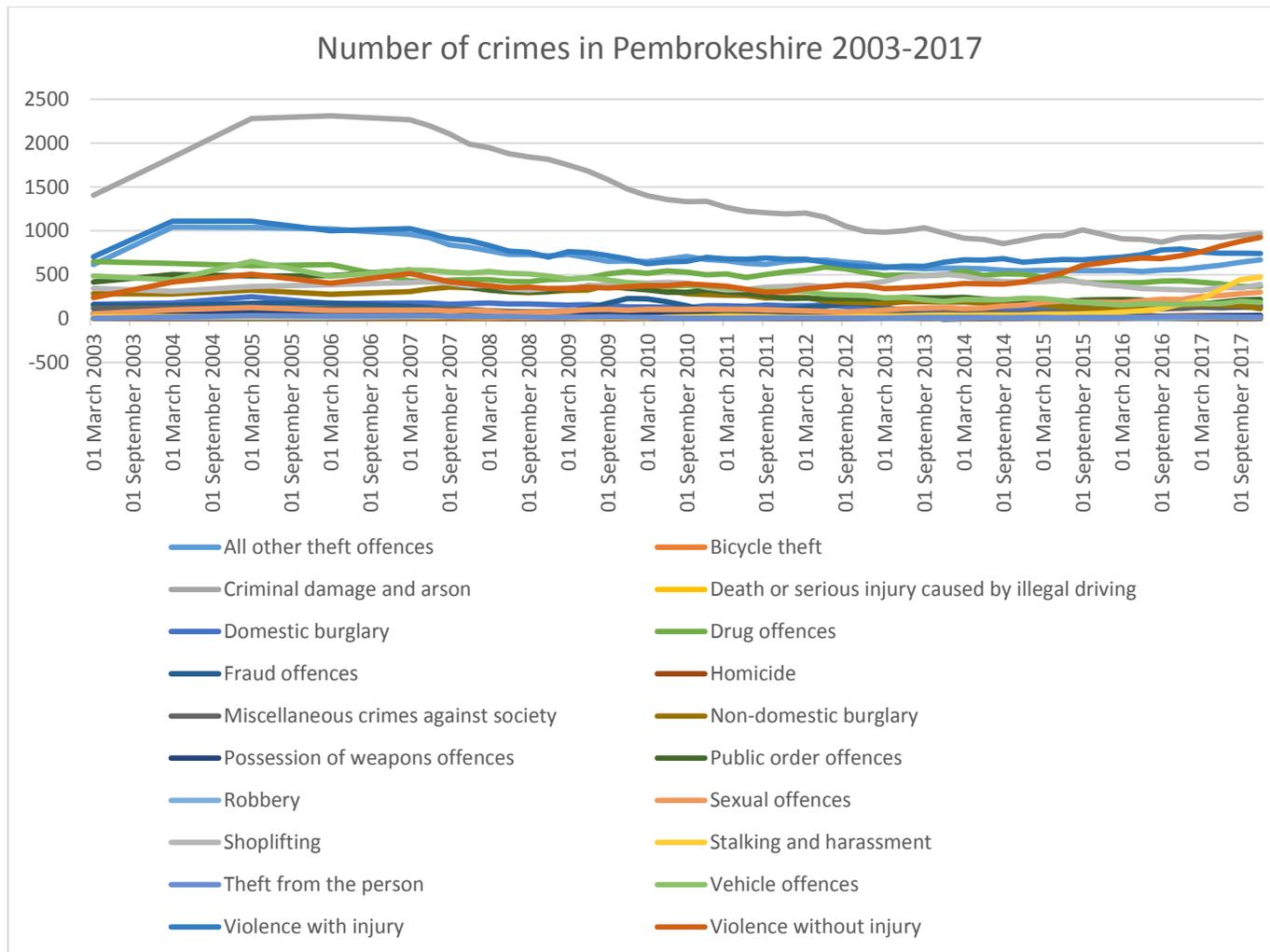
Table 31

	2001		2011	
	Pembs	Wales	Pembs	Wales
Able to speak Welsh	23,967 (21.8%)	582,368 (20.8%)	22,786 (19.2%)	562,016 (19%)
Not able to speak Welsh	86,215 (78.2%)	2,223,333 (79.2%)	95,606 (80.8%)	2,393,825 (81%)

StatsWales <https://statswales.gov.wales/Catalogue/Welsh-Language/WelshSpeakers-by-LA-BroaderAge-2001And2011Census>

Crime – Recorded Crime Figures

Recorded crime figures are presented for 2003-2017 by type of crime. Recorded crime figures for Community Safety Partnerships which equates in the majority of instances to local authorities. The data are rolling 12 month totals, with data points shown at the end of each financial year between year ending March 2003 and year ending March 2007 and at the end of each quarter from June 2007. The data cover local authority boundaries from April 2009 onwards and local authority area names correspond to community safety partnership areas.



<https://www.ons.gov.uk/peoplepopulationandcommunity/crimeandjustice/datasets/recordedcrimedatatcommunitysafetypartnershiplocalauthoritylevel>

Social Fabric Issues

- Increase in dwelling stock, but reduction in LA rental dwelling stock, and increase in rental stock with registered social landlords.

- Housing shortfall of 1406 (2007) and 1656 (2014) (units per annum).
- High house prices, affordability.
- Second homes.
- Housing land availability 5.1 year (LDP AMR).
- Access to services.

The LDP needs to have regard to improving access to services, reducing crime, improving housing including addressing affordable housing issues and housing for all sectors.

Where new housing is built or allocated, provision for school places should be made.

The Plan should also ensure compliance with EU legislation and promote wider public consultation, participation and access to environmental information. Land use planning can also reduce noise conflicts by ensuring suitable distances between sources of noise and sensitive receptors.

The SA objectives should ensure that the housing needs of the County are addressed. Housing should be resource efficient (e.g. energy and water), have good design, be integrated with public transport and key services. The SA objectives should also address safety and crime.

6. Economy

A number of indicators of the economy and industry in Pembrokeshire are given in this section which relate to the **whole of the County** including the areas in the National Park.

Economic Activity

Table 32: Economic activity statistics for Pembrokeshire, 2005

2005	Pembrokeshire (numbers)	Pembrokeshire (% of population aged 16-64)	Wales (% of population aged 16-64)
All people			
Economically active	51,400	76.8	75.2
In employment	48,100	71.9	71.2
Employees	38,700	57.8	62.1
Self employed	9,100	13.6	8.5
Unemployed	3,300	6.5	5.3
Males			
Economically active	27,800	80.8	79.0
In employment	26,000	75.7	74.1
Employees	18,900	55.0	61.0
Self employed	7,000	20.3	12.6
Unemployed	1,800	6.4	6.1
Females			
Economically active	23,700	72.7	71.2
In employment	22,100	67.9	68.2
Employees	19,800	60.8	63.2
Self employed	2,100	6.6	4.3
Unemployed	1,600	6.6	4.3

Source:

Official Labour Market Statistics - www.nomisweb.co.uk based on ONS annual population surveys data. Economically active tables Table 33

Jan 2017- Dec 2017	Pembrokeshire (numbers)	Pembrokeshire (% of population aged 16-64)	Wales (% of population aged 16-64)
All people			

Economically active†	57,600	75.8	76.0
In employment†	55,000	72.6	72.4
Employees†	42,100	56.9	62.3
Self employed†	12,200	15.0	9.6
Unemployed§	2,600	4.6	4.8
Males			
Economically active†	30,700	81.6	79.6
In employment†	29,500	78.6	75.8
Employees†	21,200	58.1	62.1
Self employed†	7,900	19.9	13.2
Unemployed§	1,200	3.9	4.8
Females			
Economically active†	26,900	70.1	72.4
In employment†	25,500	66.6	68.9
Employees†	21,000	55.7	62.4
Self employed†	4,300	10.3	6.1
Unemployed§	1,400	5.1	4.8

Source: ONS annual population survey

† - numbers are for those aged 16 and over, % are for those aged 16-64

§ - numbers and % are for those aged 16 and over. % is a proportion of economically active

Source: Nomis <https://www.nomisweb.co.uk/reports/lmp/la/1946157391/printable.aspx>

Employee jobs

The following table provides details of employee jobs in Pembrokeshire by sector, with a comparison to the Welsh average in 2006. Employee jobs do not include self-employed workers, government-sponsored trainees or members of the Armed Forces.

Table 34 – Employee jobs 2006

2006	Pembrokeshire (numbers)	Pembrokeshire (% of population aged 16-64)	Wales (% of population aged 16-64)
Total employee jobs	39,900	-	-
Full-time	24,300	60.9	68.9
Part-time	15,600	39.1	31.1
Employee jobs by industry			
Manufacturing	3,000	7.4	10.9
Construction	3,100	7.7	4.8
Services	33,400	83.6	82.9
- Distribution, hotels & restaurants	12,600	31.4	23.5
- Transport & communications	2,200	5.5	5.9
- Finance, IT, other business activities	3,600	9.0	21.2
- Public admin, education & health	12,700	31.7	26.9
- Other services	2,400	5.9	5.4
Tourism-related†	5,900	14.8	8.3

- Data unavailable

† Tourism consists of industries that are also part of the services industry

Notes: % is a proportion of total employee jobs

Employee jobs excludes self-employed, government-supported trainees and HM Forces

Source: ONS annual business inquiry employee analysis

Data for 2016 are provided below, however, the categories have changed since 2006, and are therefore not directly comparable.

Table 35 – Employee jobs 2016

2016	Pembrokeshire (employee jobs)	Pembrokeshire (%)	Wales (%)
Total employee jobs	44,000	-	-
Full-time	26,000	59.1	65.2
Part-time	18,000	40.9	34.8
Employee jobs by industry			
B : Mining and quarrying	400	0.9	0.2
C : Manufacturing	2,250	5.1	11.4
D : Electricity, gas, steam and air conditioning supply	175	0.4	0.6
E : Water supply; sewerage, waste management and remediation activities	300	0.7	0.9
F : Construction	3,000	6.8	5.5
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	7,000	15.9	15.1
H : Transportation and storage	1,750	4.0	2.9
I : Accommodation and food service activities	8,000	18.2	8.9
J : Information and communication	450	1.0	2.3
K : Financial and insurance activities	400	0.9	2.3
L : Real estate activities	800	1.8	1.6
M : Professional, scientific and technical activities	1,500	3.4	4.2
N : Administrative and support service activities	1,500	3.4	6.6
O : Public administration and defence; compulsory social security	2,000	4.5	6.8
P : Education	5,000	11.4	10.1
Q : Human health and social work activities	7,000	15.9	16.1
R : Arts, entertainment and recreation	2,000	4.5	2.5
S : Other service activities	600	1.4	1.5

Source: ONS Business Register and Employment Survey : open access

- Data unavailable

Notes: % is a proportion of total employee jobs excluding farm-based agriculture

Employee jobs excludes self-employed, government-supported trainees and HM Forces

Data excludes farm-based agriculture

Source: Nomis <https://www.nomisweb.co.uk/reports/lmp/la/1946157391/printable.aspx>

Table 36: Number of people working from home

	2001			2011		
	Pembrokeshire		Wales	Pembs	Pembs	Wales
	Number	%	%	Number	%	%
All people [†]	44,897	-	-	52,951	-	-
Works mainly at or from home [#]	7,377	16.4	9.7	5,260	9.7	5.36

[†]All people aged 16 to 74, who were usually resident in the area at the time of the 2001 Census, and were in employment.

[#]All people aged 16 to 74, who were usually resident in the area at the time of the 2001 Census, and worked mainly at or from home.

The percentage of people who work mainly at or from home (16.4%) is higher than the proportion in Wales (9.7%) in 2001. This figure dropped in 2011 but is still higher than the proportion in Wales.

Source: Census, ONS, Distance travelled to work (UV35), 2001 & 2011

Unemployment & economic inactivity

Table 37: Claimant count by age - not seasonally adjusted (May 2018)

Age	Pembrokeshire (level)	Pembrokeshire (%)	Wales (%)
Aged 16+	1,445	2.0	2.3
Aged 16 To 17	5	0.2	0.1
Aged 18 To 24	370	4.1	3.4
Aged 18 To 21	235	4.7	3.7
Aged 25 To 49	680	2.0	2.4

Source: ONS Claimant count by sex and age

Note: % is number of claimants as a proportion of resident population of the same age

Source: <https://www.nomisweb.co.uk/reports/lmp/la/1946157391/report.aspx?town=pembrokeshire>

Table 38: Working-age client group - main benefit claimants - not seasonally adjusted (November 2016)

Statistical Group	Pembrokeshire (Numbers)	Pembrokeshire (%)	Wales (%)
Total Claimants	9,680	13.5	14.4
Job Seekers	1,170	1.6	1.4
ESA And Incapacity Benefits	5,380	7.5	8.4
Lone Parents	820	1.1	1.2
Carers	1,670	2.3	2.2
Others On Income Related Benefits	160	0.2	0.2
Disabled	310	0.4	0.7
Bereaved	160	0.2	0.2
Main Out-Of-Work Benefits†	7,530	10.5	11.3

Source: DWP benefit claimants - working age client group

† Main out-of-work benefits includes the groups: job seekers, ESA and incapacity benefits, lone parents and others on income related benefits. See the **Definitions and Explanations** below for details

Notes: % is a proportion of resident population of area aged 16-64

Figures in this table do not yet include claimants of Universal Credit

Source: Data extrapolated from Nomis:

<https://www.nomisweb.co.uk/reports/lmp/la/1946157391/report.aspx?town=pembrokeshire>

Seasonal unemployment still the case.

Economically inactive

Table 39: Economic inactivity rate (excluding students) StatsWales

	Year ending 31 Mar 2005	Year ending 31 Mar 2006	Year ending 31 Mar 2007	Year ending 31 Mar 2008	Year ending 31 Mar 2009	Year ending 31 Mar 2010	Year ending 31 Mar 2011	Year ending 31 Mar 2012	Year ending 31 Mar 2013	Year ending 31 Mar 2014	Year ending 31 Mar 2015	Year ending 31 Mar 2016	Year ending 31 Mar 2017	Year ending 31 Mar 2018
United Kingdom	21.0	20.8	20.5	20.4	20.1	20.2	20.3	19.9	19.3	18.8	18.6	18.5	18.3	17.8
Wales	24.7	24.4	24.0	23.7	23.4	24.1	23.6	22.9	21.7	20.7	21.3	20.8	20.7	19.8
Pembrokeshire	26.2	25.1	24.9	24.8	23.2	24.0	25.1	23.8	22.9	21.0	19.9	21.8	21.2	22.4

Source: StatsWales <https://statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Economic-Inactivity/economicinactivityratesexcludingstudents-by-welshlocalarea-year>

Employment Land availability

Land identified for employment purposes (permitted, allocated or built) in 2013 was 1137.37Ha, outside the National Park. By 2016 it increased to 1195.34Ha. In 2016, 976.5Ha was actively in use as employment land. A total of 192.5Ha was recorded as being vacant (including buildings) in 2013, and this was recorded as 217.82Ha in 2016. There is an 18% vacancy level however its geographical distribution varies considerably. There are significant changes in use of land on existing sites on a year by year basis, as parts of them cease to be used or come back into use. Overall provision of general industrial sites and take up is good in general, but there may need to be adjustments to allocations in some locations in conjunction with preparation of LDP2. Provision of serviced units remains a challenge, as funding to build new units is hard to secure and without this, development may be unviable (**Source:** PCC LDP Review background documents, 2018).

Income

Table 40: Average gross weekly pay (full time workers) in Pembrokeshire and Wales by residence, 2006 – 2016

Year	Gross weekly pay	
	Pembrokeshire	Wales
2006	£367.50	£404.20
2007	£364.20	£414.80
2008	£415.30	£424.80
2009	£427.60	£444.60
2010	£463.20	£456.20
2011	£463.70	£455.10
2012	£419.90	£454.90
2013	£478.83	£475.30
2014	£432.50	£479.40
2015	£430.00	£473.40
2016	£459.00	£498.30

Sources:

Official Labour Market Statistics, Nomis www.nomisweb.co.uk

Labour Demand

'Jobs density' is a ratio of total jobs available to population aged 16-64. Total jobs includes employees, self-employed workers, government-sponsored trainees and members of HM Armed Forces.

Table 41: Jobs density in Pembrokeshire, Wales and G.B.

	Pembrokeshire (density)	Wales (density)	Great Britain (density)
2001	0.71	0.70	0.80
2005	0.74	0.73	0.80
2006	0.72	0.72	0.79
2007	0.72	0.71	0.79
2008	0.68	0.70	0.79
2009	0.73	0.70	0.77
2010	0.72	0.69	0.77
2011	0.75	0.70	0.78
2012	0.77	0.71	0.78
2013	0.77	0.72	0.79
2014	0.76	0.73	0.81
2015	0.76	0.75	0.83
2016	0.77	0.76	0.84

Source:

Official Labour Market Statistics, based on ONS Census and population survey data

https://www.nomisweb.co.uk/reports/lmp/la/1946157391/subreports/jd_time_series/printable.aspx?&allInGB=&pivot=1&sort=&ascending=

Stock of VAT Registered Businesses

Table 42: The number of VAT registered businesses in Pembrokeshire at the beginning of recent years and the annual net loss / gain of registrations

	VAT Registered Business per Year*				
	2004	2005	2006	2007	2008
Stock at 1 January	4975	4895	5135	5165	5305
Net loss / gain	N/A	-80	+ 240	+30	+140

*This dataset has not been updated since 2008. Data are now recorded as business births, deaths and survival rates.

Active Business Enterprises (2010-2016)

Table 43

	2010	2011	2012	2013	2014	2015	2016
Pembrokeshire	4,640	4,525	4,455	4,480	4,490	4,500	4,585
Wales	90,435	88,590	87,985	89,750	92,445	95,010	98,445

Active enterprises are defined as businesses that had either turnover or employment at any time during the reference period. Births and deaths are then identified by comparing active populations for different years.

Source: ONS

<https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/datasets/businessdemographyreferencetable>

Industrial Structure

Table 44: Size of enterprises by quantity and percentage in Pembrokeshire and Wales (2006)

Size	Pembrokeshire 2006		Wales (2006)	
	Number of enterprises	% of total enterprises	Number of enterprises	% of total enterprises
All Enterprises	11,865	100	190,420	100.0
Micro (0 – 9 employees)	11,220	94.5	179,855	94.5
Small (10 – 49 employees)	390	3.3	7,065	3.7
Medium (50 – 249 employees)	80	0.7	1,890	1.0
Large (250+ employees)	175	1.5	1,615	0.8

UK Business Counts (2017)

Table 45

Enterprises	Pembrokeshire (Numbers)	Pembrokeshire (%)	Wales (Numbers)	Wales (%)
Micro (0 To 9)	4,970	90.0	91,470	89.2
Small (10 To 49)	495	9.0	9,430	9.2
Medium (50 To 249)	55	1.0	1,375	1.3
Large (250+)	5	0.1	305	0.3
Total	5,525	-	102,585	-

Local Units				
Micro (0 To 9)	5,515	85.8	104,535	83.2
Small (10 To 49)	795	12.4	17,385	13.8
Medium (50 To 249)	110	1.7	3,270	2.6
Large (250+)	10	0.2	490	0.4
Total	6,430	-	125,675	-

Source: Inter Departmental Business Register (ONS)

Note: % is as a proportion of total (enterprises or local units)

Source: <https://www.nomisweb.co.uk/reports/lmp/la/1946157391/report.aspx?town=pembrokeshire>

The data contained in the table are compiled from an extract taken from the Inter-Departmental Business Register (IDBR) recording the position of units as at March of the reference year. The IDBR contains information on VAT traders and PAYE employers in a statistical register which provides the basis for the Office for National Statistics to conduct surveys of businesses.

The table presents analysis of businesses at both Enterprise and Local Unit level. An Enterprise is the smallest combination of legal units (generally based on VAT and/or PAYE records) which has a certain degree of autonomy within an Enterprise Group. An individual site (for example a factory or shop) in an enterprise is called a local unit.

The employment information on the IDBR is drawn mainly from the Business Register Employment Survey (BRES). Because this is based on a sample of enterprises, estimates from previous returns and from other ONS surveys have also been used. For the smallest units, either PAYE jobs or employment imputed from VAT turnover is used.

Estimates in the table are rounded to prevent disclosure.

Source:

<http://www.statswales.wales.gov.uk/TableViewer/tableView.aspx?ReportId=1694>

<https://www.nomisweb.co.uk/reports/lmp/la/1946157391/report.aspx?town=pembrokeshire>

Wealth Creation

Wealth creation is measured by Gross Value Added (GVA) per capita. GVA measures the contribution to the economy of each individual producer, industry or sector in the United Kingdom.

Table 46: Gross Value Added (GVA) in £ per head at current basic prices, 2002-2016

Year	Pembrokeshire	South West Wales	Wales
2002	11,891	11,278	12,793
2003	12,934	11,964	13,551
2004	13,573	12,686	14,201
2005	14,674	13,591	14,847
2006	15,205	14,283	15,648
2007	15,657	14,539	16,053
2008	14,384	14,278	15,784
2009	14,229	14,204	15,577
2010	14,745	14,601	15,797
2011	15,275	15,125	16,581
2012	15,423	15,349	16,957
2013	16,293	15,781	17,559
2014	15,842	16,380	17,837
2015	17,155	16,761	18,495
2016	17,635 (p)	17,381 (p)	19,140 (p)

Source: StatsWales, 2017

<https://statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/Regional-Accounts/Gross-Value-Added-GDP/gva-by-measure-welsheconomicregion-year>

South West Wales comprises Pembrokeshire, Carmarthenshire, Swansea and Neath Port Talbot.

(p) denotes provisional

Agriculture

The Business Register and Employment Survey excludes farm-based employment, which is estimated by the June Agricultural Survey (most recently in 2013). This estimates 2,279 active farms in Pembrokeshire, with 1,700 full time principal farmers and 2,086 part time principal farmers. Additional employment is given as 780 regular workers and 643 casual workers. The area farmed is approximately 140,000 ha, up from approximately 125,000 ha in 2002. 12% of this land is used for crops and horticulture. The remainder is grassland: permanent pasture (86,000 ha), rough grazing (8,000 ha), and rotational grassland (21,000 ha). The grassland supports 308,000 sheep and 175,000 cattle (of which approximately a fifth are specialist beef animals and the remainder are primarily for dairy production).

There are a further 400 jobs in non-farm-based agriculture¹⁷, including support activities, hunting and fishing, wholesale of agricultural machinery, equipment, and supplies, and retail of flowers, plants, seeds, fertiliser, etc. Particularly notable is the veterinary activities sector, which employs 200 people, or three times the national average proportion.

Logging and manufacture of wood-based items generate a further 100 jobs, and there are 100 workers in quarrying; these are both high by national standards.

Source: Pembrokeshire Economic Profile (2015)

https://www.pembrokeshire.gov.uk/objview.asp?object_id=4096&language=

Tourism

Table 47: Volume and value of tourism in Pembrokeshire – Summary

	CAMBRI DGE 2003	STEAM 2003	CAMBRIDGE 2004	STEAM 2004	STEAM 2014	STEAM 2015
Visitor trips						
Staying trips (M)	1.153	*	1.209			
Tourism/leisure day trips (M)	2.1	2.025	2.173	1.875	1.947	1.983
Total visitor nights (M)	5.1	10.565	5.377	10.732	11.37	12.07
Total visitor days (M)	7.2	12.59	7.550	12.607	13.32	14.05
Visitor spend						
Direct visitor spend (£M)	262	*	292.712		403.65	434.69
Indirect and induced spend (£M)	81	*	70.091			
Total visitor spend (£M)	343	423	362.803	450.300		
Economic Impact (£M)					543.37	585.13
Employment						
Direct employment (FTEs)					9,933	10,176
Total employment (FTEs)	6,139	*	6,415	16,105	11,438	11,834

2005 – STEAM Model (Scarborough Tourism Economic Activity Monitor)

2004-2015 STEAM Final Trend Report

Summary (2015)

Total tourism trips (staying and day visitors) – 13,320,000

Total tourism spending - £434,690,000

FTE jobs supported by tourism – 10,176 (Direct); 11,834 (Total)

Sources: STEAM Final Trend Report 2004-2015 http://www.tourismhelp.co.uk/objview.asp?object_id=721
Pembrokeshire Destination Management Plan 2013-2018 http://www.tourismhelp.co.uk/objview.asp?object_id=691

Swansea Bay City Region

Pembrokeshire signed up to the Swansea bay City Region in March 2017. The City Deal is expected to give the Swansea Bay City Region a permanent uplift in its GVA of £1.8 billion and will generate almost 10,000 new jobs over the next 15 years. The total investment package is made up of £241 million UK and Welsh Government funding, £396 million other Public Sector investment and £637 million from the Private Sector.

The City Deal programme encompasses 11 projects across 4 key themes of Economic Acceleration, Life Science and Well-being, Energy, and Smart Manufacturing. An enhanced Digital Infrastructure and next generation wireless networks and the development of workforce skills and talent will underpin each.

Source: Swansea Bay City Deal Website <http://www.swanseabaycitydeal.wales/about/>

Pembrokeshire is involved in three key schemes as part of the City Deal. Led by the Port of Milford Haven, Pembroke Dock Marine is a £76million project to establish a marine energy centre around the Milford Haven waterway. This will be a centre for marine energy development, fabrication, testing and deployment in the town's former naval dockyard. The other two schemes, which will be rolled out across the whole region, involve improving broadband and mobile communications; and creating a new industry based around innovative and sustainable energy generation in houses.

Source: PCC Annual Improvement Review 2017 https://www.pembrokeshire.gov.uk/objview.asp?object_id=1624&language=

Recreation Facilities

Pembrokeshire County Council operate a variety of leisure facilities including multi-activity leisure facilities, sports halls, artificial turf pitches, tennis courts, squash courts, and a climbing wall. In addition there are other school and community based indoor and outdoor facilities available.

Table 48: Visitors using Leisure Centres

Year	Number
2004/05	984,000
2005/06	1,195,000
2006/07	1,318,000
2007/08 (Projected number)	1,357,000

Source: Health Care and Well-being Strategy 2008-2011 – Needs Assessment Report 2007, Corporate Improvement Plans (2006-2008)

Table 49:

The number of visits to local authority sport and leisure centres during the year where the visitor will be participating in physical activity, per 1,000 population		
Year	Pembrokeshire	Wales
2015/2016	9,804	8,409
2016/2017	10,121	8,387

Source: PCC Annual Improvement Review 2017 https://www.pembrokeshire.gov.uk/objview.asp?object_id=1624&language=

Rights of Way

The Rights of Way Improvement Plan 2018-2028 is being consulted upon in 2018. Current Rights of Way Network characteristics:

Table 50:

Types of route	Pembrokeshire (all routes)	PRoW in the National Park	PRoW in PCC plan area
Footpaths	1832.7 km 77.9% of the network	583.7 km	1249 km
Bridleways	497.6 km 21.2% of the network	177.9 km	319.7 km
Restricted Byways (formerly known as Roads Used As Public Paths)	2.6 km 0.1% of the network	1.1 km	1.5 km
Byways Open To All Traffic (BOATs)	18.8 km 0.8% of the network	7.2 km	11.6 km

Source: Rights of Way Improvement Plan for Pembrokeshire (ROWIP) Consultation Draft 2018-2028

Table 51

	Length of right of way and permissive path (m)	% of paths surveyed
Open	878,106	83.5%
Closed	172,533	16.5%
Total surveyed	1050,639	(100%)

Source: Rights of Way Improvement Plan for Pembrokeshire (ROWIP) 2007-2017

Communications and Utilities

Water & Sewerage

Waste water – Dwr Cymru Welsh Water has numerous Waste Water Treatment Works within the County which are designed to treat foul effluent from residential and commercial/industrial premises. The discharges from each of the Works are licensed by the Natural Resources Wales to meet European Directives. Dependant on the scale of development identified within the Local Development Plan the associated sewerage catchments (sewer network & WWTW) may need to be upgraded as required to accommodate future growth (Dwr Cymru Welsh Water).

Broadband, Digital Television and Radio Coverage

The area's ICT links are a key factor in its competitiveness and have the potential to reduce the need to travel. Although nearly all exchanges are now enabled for broadband, there are significant constraints on geographical coverage, capacity and cost. It is crucial to develop bandwidth and coverage, and to encourage competition between suppliers, so that the area has access to competitively priced, high specification broadband. Wireless broadband opportunities need to be exploited as part of this. More work is needed to increase take-up of ICT applications by local business and by the public more generally. A programme of action on ICT will be developed (WSP Pembrokeshire Haven, <http://new.wales.gov.uk/about/strategy/spatial/pembrokeshire/Pembsinterim/accessibility/?lang=en>). Superfast Broadband is a priority for Welsh Government

Pembrokeshire's economy is currently relatively self-contained; that is most people who live in Pembrokeshire work in Pembrokeshire. Whilst increases in home-working (and therefore the potential for people's work base to be some distance from Pembrokeshire) are discernible in the 2001 and 2011 Census, the increase is from a very low base.

A continued rise in use of data and reliance on IT systems will shape how work is undertaken is anticipated. To date, innovations in information communication technology have been easier and more cost effective to introduce in urban areas than in rural areas. Nonetheless, significant investment in broadband is planned and this may lead to an increase in home working. This will enable Pembrokeshire to market its high quality of life as a factor in attracting new residents. Homeworking, which is likely to be more of a feature of public sector employment, will affect the social dynamic that work provides.

Digital radio is transmitted via the Preseli mast and should provide DAB radio to the majority of the County. Similarly, digital television is available throughout the County.

Mobile Communications

Groupe Speciale Mobile Association (GSMA) represents the interests of mobile operators worldwide, providing a platform for over 700 networks including all the UK's leading providers (Three, EE, O2 and Vodafone). Pembrokeshire lags behind much of the UK in terms of 4G coverage, which enables greater Internet use and video messaging. On average customers in Wales can get a 4G just 35.4% of the time. In Pembrokeshire there is varying coverage:



Sources:

Mobile network coverage, Which? <https://www.which.co.uk/reviews/mobile-phone-providers/article/mobile-phone-coverage-map>
Mobile coverage Wales <https://www.which.co.uk/reviews/mobile-phone-providers/article/mobile-phone-coverage-across-the-uk/mobile-phone-coverage-in-wales>

Economy Issues

- Increase in economically active.
- Seasonal jobs

- Low pay compared to Wales
- Large proportion of small businesses.
- Low GVA
- Tourism economy.
- Broadband coverage
- Mobile coverage.

The LDP should seek to develop economic opportunities while balancing the needs of the environment and social implications working towards sustainable development. Employment land will be subject to site specific SA later in the process. In addition to allocating land the Plan can have policies enabling home based working, farm diversification, encouraging tourism and retail for example. The Plan should ensure compliance with EU legislation and promote wider public consultation, participation and access to environmental information.

SA objectives should seek to guide improvement of employment opportunities which in turn will impact many aspects including unemployment, job satisfaction, improved wages, and quality of life. This will also support the regeneration of the towns and local centres. Good quality employment will encourage younger people to stay in the area or return to the County, which will also help to balance the demographic profile.

A sustainable and diverse local economy entails good quality tourism and leisure development which links tourism to culture, heritage, retail, agriculture and the environment. The energy industry plays an important role in the economy and the promotion of renewable and low carbon energy production can complement this. The development of good quality infrastructure and broadband services is also an integral aspect to support a sustainable and diverse local economy.