

The logo for iDeA, consisting of the lowercase letters 'iDeA' in a white, sans-serif font on a light blue rectangular background.

MILFORD HAVEN PORT AUTHORITY

Quay Stores Cultural Centre

Feasibility Study – APRIL 2017

The logo for Trilein, featuring the word 'Trilein' in a white, sans-serif font next to a stylized graphic of three dots connected by lines, resembling a triangle or a network.

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INTRODUCTION

ONE

iDeA architects and Trilein Ltd. ('we'/'the consultants') were commissioned by the Milford Haven Port Authority ('MHPA'/'the client') to undertake a feasibility study for the redevelopment Milford Haven Quay Stores site and former Victoria Filling Station (hereafter referred to collectively as the 'Quay Stores'/'the site') for commercial use as a cultural centre. The site boundary and location is shown in Figure 1. This development is an early stage of MHPA's wider regeneration masterplan for Milford Haven Waterfront (Figure 2).

An initial "architectural concept" has been drawn up (see Appendix 1), which drew on early discussions with the Torch Theatre in Milford Haven, and included:

- a 400-seater auditorium/conference facility;
- retail space;
- exhibition space;
- café and viewing gallery overlooking the Haven Waterway; and
- bridge link to the town centre.

THE BRIEF

The brief required:

- consideration of the massing of development appropriate for this site;
- concept drawings;
- likely tenant mix and tenant demand;

- likely rental to be achieved from the various uses;
- views and likely demand for a large mixed use area within the development;
- comments on a possible vertical link to the Torch Theatre / adjoining above;
- comments on the concept content above; and
- provide any other relevant comments

The study was funded by LEADER funding and the study process followed its key principles, which are:

- community participation;
- integrated;
- innovative e.g. involves new work/adds value to brings new dimensions, or explores new delivery mechanisms;
- brings organisations together in partnership;
- area-based;
- co-operative; and
- networking.

The study took place during the first quarter of 2017.

APPROACH

We began by meeting with MHPA to develop a more detailed understanding of the project history and the context within which the study was to be undertaken, as well as to explore the client's aspirations. We also conducted

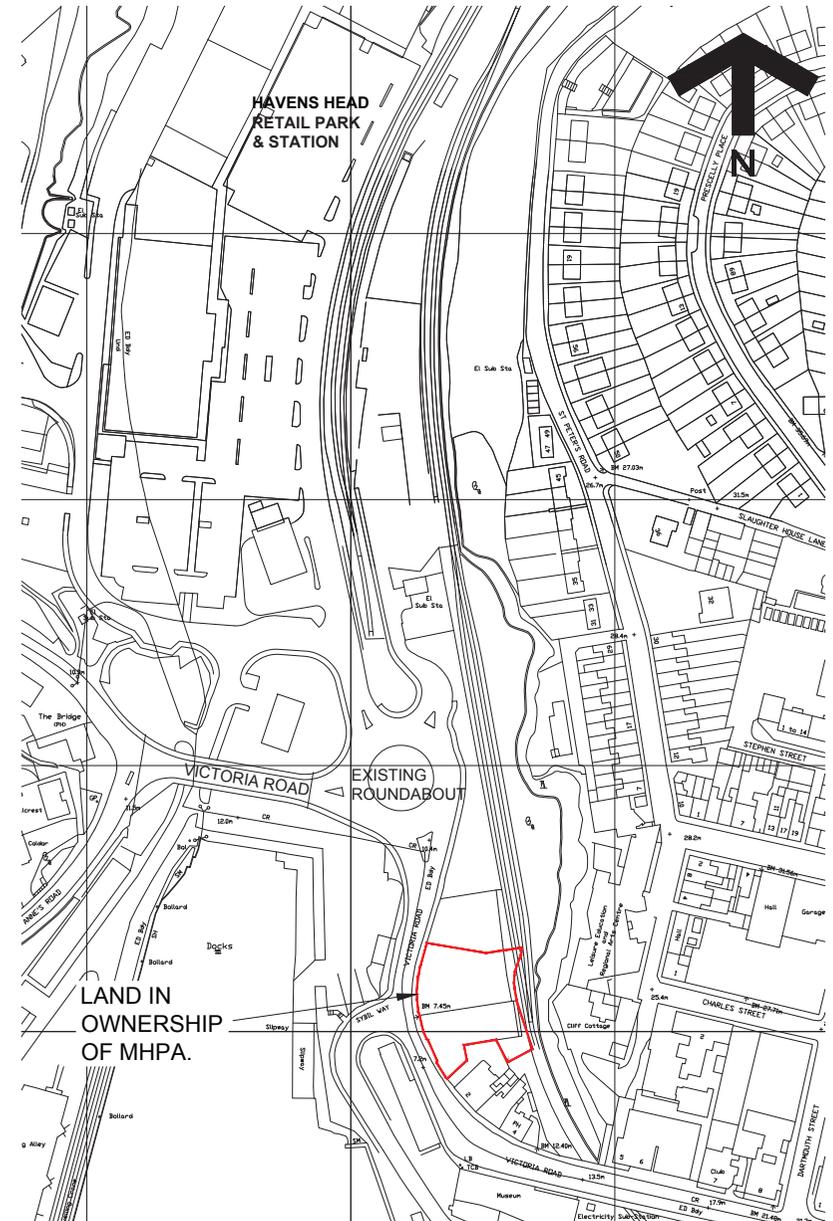


Figure 1, Quay Stores site map

Figure 2, Milford Waterfront regeneration masterplan



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- Phase 1a (0.86ha)
- Phase 1b (1.90ha)
- Phase 1b - area under 'Victoria Road' bridge
- Phase 2 - 3.8ha
- Outside of Phase 2 ownership
- Phase 3a - 0.36ha
- Phase 3b - 0.57ha
- Phase 4 - 1.44ha
- Outside of Phase 4 ownership
- Phase 5 - 3.20ha

DRAFT

Client:
Port of Milford Haven

Project:
Milford Dock

Drawing:
Masterplan Phasing Strategy

Project Number:
MILT3005

Status:
DRAFT

Date:
April 2016

Scale:
Not to Scale

Turley

an initial site appraisal to place the site in the wider context of the surrounding urban area, involving desk-based analysis combined with walkabouts of the area to establish a firmer understanding of the site context.

Following some further site analysis, we held an initial discussion with the Torch Theatre to better understand their needs and aspirations. We concluded the first stage with an interim meeting with the MHPA to discuss the site context and our initial impressions following the meeting with the Torch.

In the second phase of the work we undertook a series of one to one discussions with a range of key stakeholders in the local area, following a suggested list of contacts from MHPA and supplemented by suggestions from other consultees as we progressed (see Appendix 2). This was combined with further desk based work to explore local provision and need, in order to build a better understanding of potential need for an additional cultural facility in the area, which can meet a range of community needs. We also further refined our understanding of the site context in this second phase.

We concluded the second stage with a meeting with the client to present our findings prior to writing this report and refining a series of drawn options. The contents of this report reflect the discussions in the final client meeting, with

some further refinement and augmentation of the findings presented, but with no significant deviations to our conclusions as presented in that meeting.

LIMITATIONS

The study is a top-level analysis drawn from key stakeholder views with outline concept drawings. Detailed market research of any one individual sector or potential user group was not feasible within the resource constraints of the study, nor do we suggest that this is required. The stakeholder discussions generated a considerable degree of consensus and drew upon existing detailed knowledge of the local area and local needs, not least from the Torch as an established and knowledgeable cultural provider with a detailed knowledge of the cultural market in south-west Wales, but also from elected officials from the Town Council, input from senior officers from Pembrokeshire County Council and other key local agencies as detailed in Appendix 2.

REPORT STRUCTURE

The next section considers the building and the site context. Section 3 considers the need/demand and potential for such a facility.

Section 4 considers the options for the built form of a redeveloped site, beginning with some commentary on the previous scheme and referring to several drawn options for the site produced through this commission. Section 5 considers wider themes that are relevant to the development of a cultural cluster in the docks area, including but not limited to the Quay Stores site. Section 6 provides summary conclusions, with recommendations for MHPA. Supporting materials are included as appendices.

SITE CONTEXT

TWO

This section provides an analysis of the current building and its situation within the wider urban area.

THE QUAY STORES SITE

The Quay Stores is a former warehouse and goods store with a gabled front façade on Victoria Street. The building is Grade II listed. Adjacent to the building is the site of a former filling station, part of which is included within the 'red line' of development for this site (see Figure 2). The station has been demolished and cleared leaving an open area within the site curtilage alongside the warehouse.

The building currently stands vacant and at risk, in a semi-derelict state. Whilst the façade fronting onto the A4076 and wrapping around the front (north facing) edge of the building to look over the filling station site, the rear section of the building exterior has few visual merits externally, but this masks some interior features of real interest and character (see Figures 3a - 3d).

Of relevance to the scheme is the imminent development of a drive through Costa Coffee, which has been progressed through planning and is due for construction on the site immediately to the north of the Quay Stores (Figure 4, overleaf).



Figure 3 (a-d), Building interior images

HISTORY

The site is situated overlooking the dock harbour, in an area formerly occupied by railway lines and goods yards that fed into the dockyard. This has always been a crossing point between two communities. The new town of Milford Haven – laid out in the 18th Century – and the older village community of Hakin (which has expanded in the post-War period), situated opposite across the dock. As the dockyard developed, over the years a series of bridges were constructed nearby to link the two communities, and there were



great celebrations when the former toll bridge was replaced with a new reinforced concrete bridge and the tolls placed on traffic were removed. This bridge has itself been replaced with a modern 20th Century bridge that is much wider to meet current trunk road specification standards, incorporating an elevated roundabout within a short distance of the Quay Stores.

To the north, a modern retail park has developed with 'out of town' shopping provision for predominantly car-based shoppers.

The surrounding area is dominated by heavy engineering to accommodate modern

highways standards and almost exclusively geared towards car-based uses.

PHYSICAL BARRIERS

The site in its current context is a difficult one for a commercial proposition that requires footfall. Levels of pedestrian footfall are modest with a busy road and relatively narrow pavement at the front, making for a poor pedestrian environment. The retail park to the north is largely functionally segregated from the site, with consumers arriving there and leaving by car and few walking on foot past the site to access the town centre, which can only be accessed via the steeply curving A4076 up to Hamilton Terrace.

Figure 5 (overleaf) illustrates how the site is sandwiched between two physical barriers:

- the A4076 arterial trunk road that runs along the site frontage (Figure 6) giving vehicular access to the dock, the retail park and the railway station in Havens' Head immediately to the north, and to Hakin to the west via a bridge over the dock; and
- the natural cliff escarpment, which contains the site to the rear and separates it from the Torch Theatre and the town centre high above – a height difference equivalent five to six storeys (see Figure 7).

Figure 4, Costa Coffee development in relation to the site

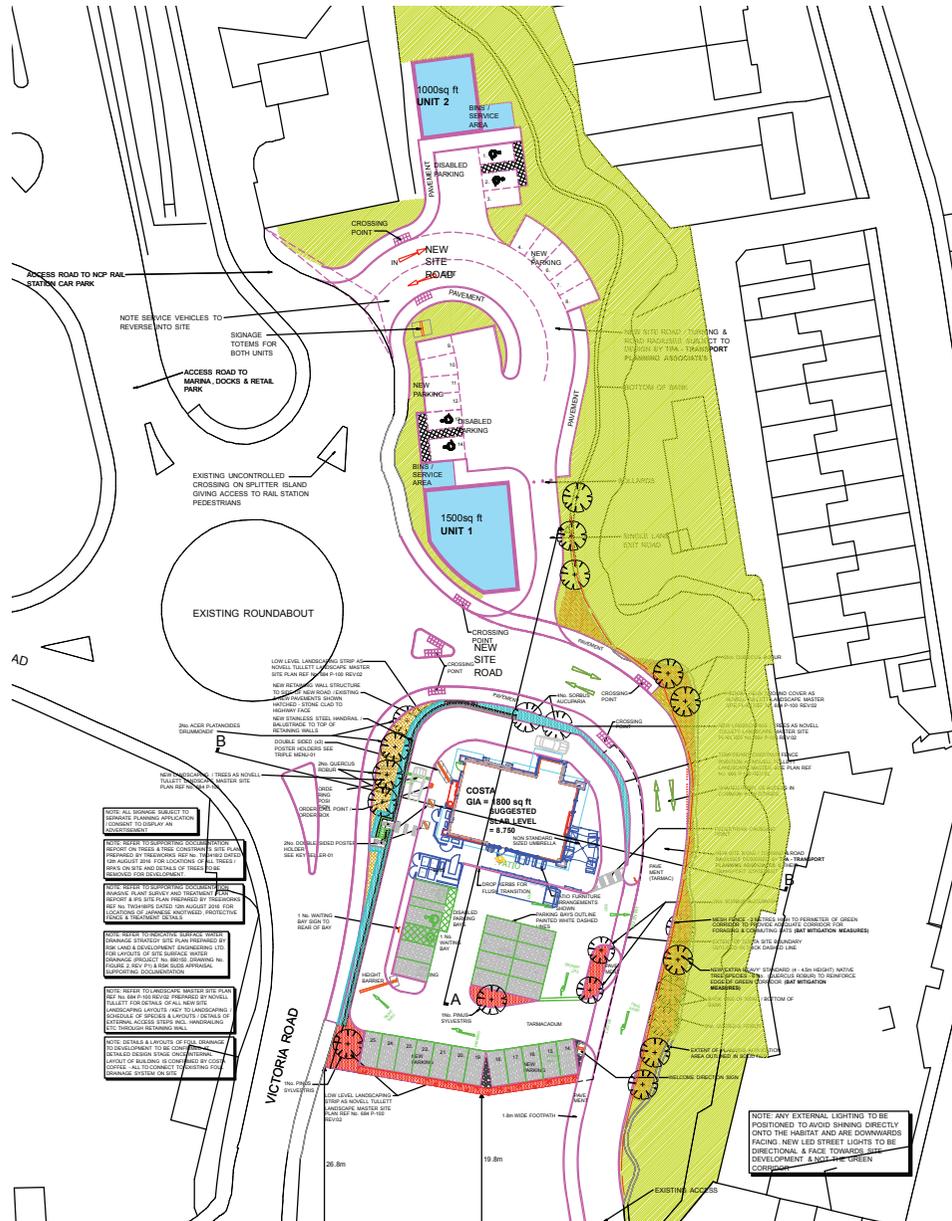


Figure 5, Physical barriers constraining the site

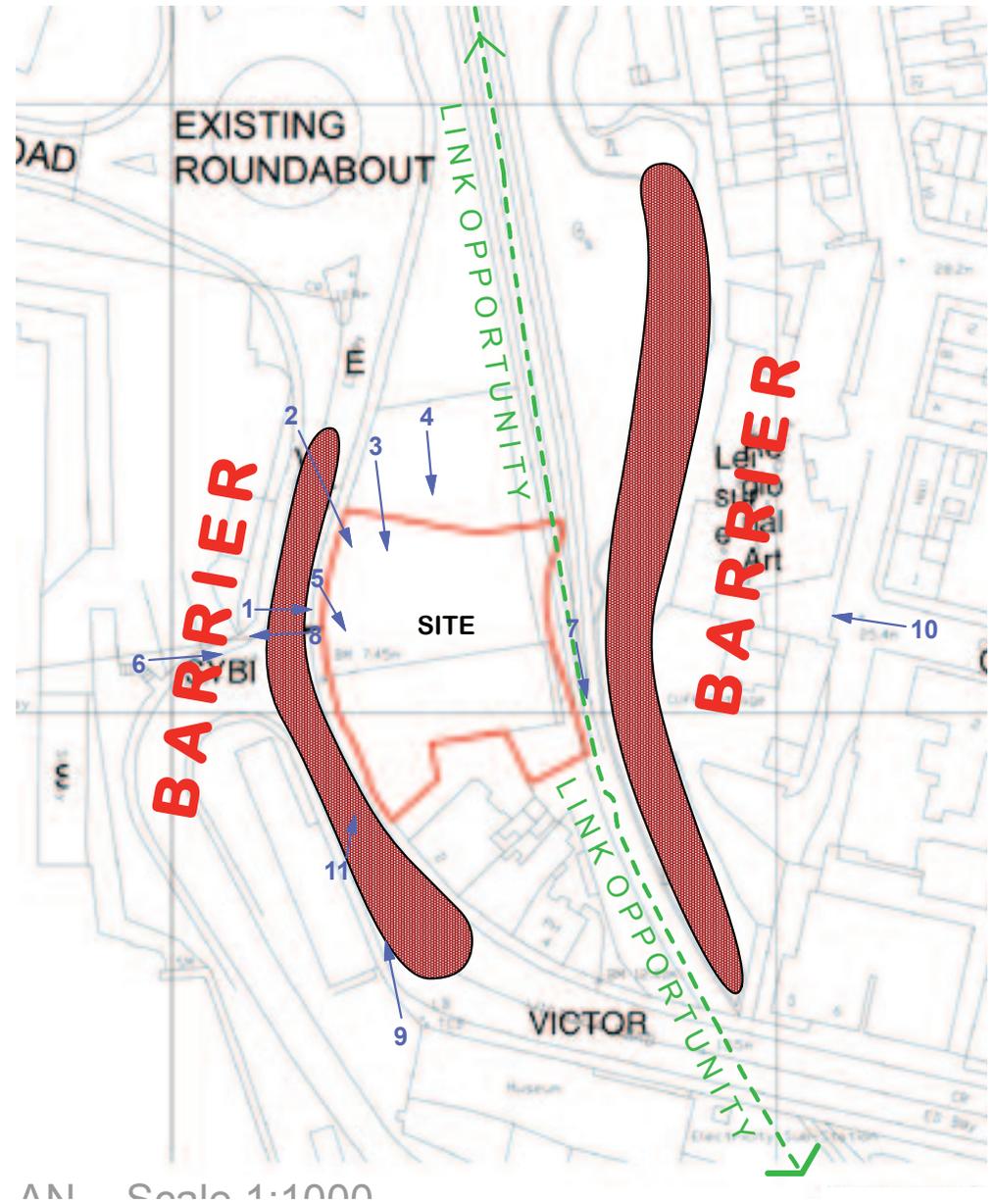




Figure 6, A poor pedestrian environment on the A4076 running in front of the Quay Stores site



Figure 7, The Quay Stores site with the river bluff to the rear and the Torch Theatre above

The physical barrier of the river bluff, with the town centre atop, presents a particular challenge for the site. This will be mitigated to some degree by the development of more activity to the south and west as the docks redevelop, but the functional linkage to the town centre and to the train station through this site should be an aspiration.

These geographical and environmental barriers currently serve to isolate the site.

WALKABILITY

Walkability is normally defined as being approximately 400metres, five-minutes walking distance for residents living in nearby homes. Daily needs, including public transport, should be accessible within that distance and certainly within a 10-minute walk. Figure 8 shows the walking circles centred on the existing town centre on Charles Street and the sub-centre in Hakin. Note that the latter is difficult to centre accurately due to the weakness of that sub-centre (a symptom of the low density of housing in Hakin), which exemplifies the importance of the residential market to allow businesses to thrive.



Figure 8 , 400m walking circles in relation to the Quay Stores site

Insufficient residential density (number of houses or households per hectare) within easy walking distance results in insufficient footfall to sustain commercial and social resources, such as community and cultural facilities as well as retail or other similar activities that require footfall. That places a requirement on customers to be car-borne, which brings a range of challenges both for the scheme itself (principally congestion and parking provision) and for the town centre – an increase in car borne focused provision will likely serve to further undermine an already fragile town centre. Conversely, a scheme at the Quay Stores site that seeks to physically integrate with the town centre by connecting and promoting key lines of footfall can assist in strengthening it.

The spatial structure (road and pathway systems) of town leading to and around the site need to be conceived to minimise distances from home to facilities that might be used on a day to day basis. Whilst the next section will outline a much wider trade area for the building, this day to day footfall of local people calling in for a coffee or a sandwich or making an impromptu decision to sit and listen to a lunchtime recital for example, can only serve to strengthen the viability of the site.

There was some discussion of a car-based consumer offer at the Quay Stores site by accommodating a fast food or similar style provision, linking with the car-based drive-thru Costa to be constructed imminently to the north of the Quay Stores site. The provision of facilities that rely substantively on purely car-based consumers does not feature in any of our recommendations as in our view it would be detrimental both to the wider docks redevelopment and the town centre as a whole, for the reasons explained above.

SITE LINKAGES

The combination of these factors makes the site as it stands problematic for development as a viable community and cultural facility that integrates with the wider town centre – the footfall levels are very low there.

However, there are real opportunities to transform the building and unlock the site's potential as a catalyst for regeneration, and a strategic focal point in the wider context of MHPA's plans to regenerate the waterfront as a visitor destination.

The site's latent strategic potential becomes clearer when seen in relation to two routes or 'lines of movement' (see Figure 9) that cross here:

- North – South. The 'green route' along the former railway line which skirts the cliff escarpment and curves around into the dock via the tunnels under Hamilton Terrace; and
- East – West. A route extending in a straight line from the end of Charles Street down to the dock, linking the waterfront harbour with the town and connecting the two communities of Milford Haven and Hakin more directly.

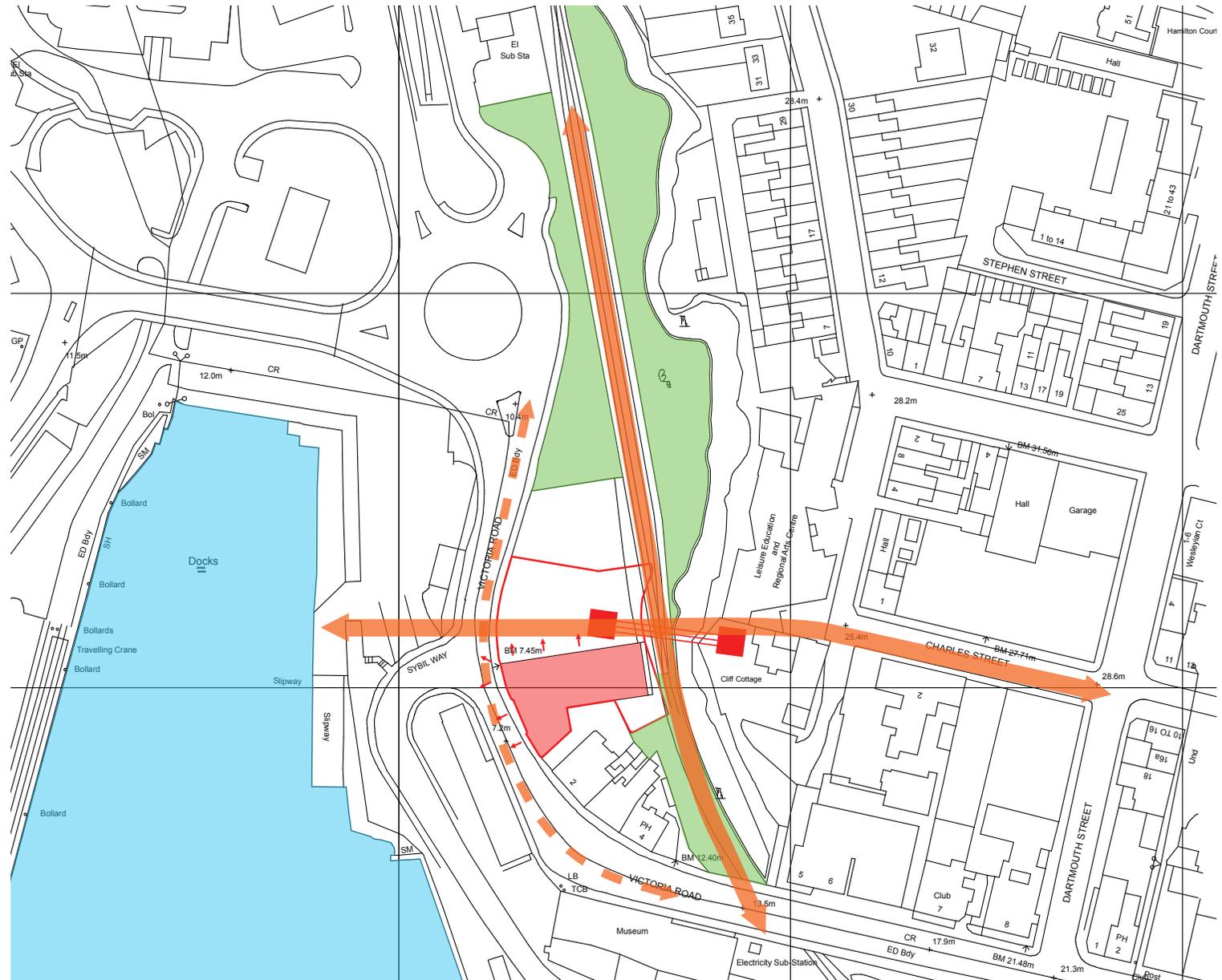


Figure 9, Key linkages through the site

EAST-WEST LINKAGE

A missing element is needed to complete the East-West route and provide the vital link between the town and the waterfront. This requires a new piece of infrastructure such as an inclined lift or funicular. The funicular would travel the short distance up the cliff to the Torch Theatre and Charles Street, and down to the Quay Stores and the waterfront below, where walking / cycle green routes and a shared space (see later notes on each) connect the Quay Stores site to the waterfront development and nearby cultural and recreational amenities, as well as to the railway station.

The termination of the funicular at the higher-level needs to be adjacent to the Torch (which will require some resolution of their loading area, which is entirely achievable) and may perhaps take in the clifftop cottage that MHPA is seeking to acquire. The key issue is to maintain as straight a line as possible (as shown in Figure 9) from Charles Street, down the funicular and onwards into the docks. The visibility of the funicular termination to the length of Charles Street extending eastwards is essential in reinforcing it as a linkage. Similarly, the visibility and accessibility of the termination of the funicular at ground level is also vital in making the link work (the latter becomes more problematic with increased massing of construction at the lower level).

Some further works to enhance the walking route from the core of Charles Street to the Torch, perhaps with some further traffic calming there at the key junctions, would help to strengthen that and form the basis for further discussions with the Local Authority.

The previous drawn proposals for the Quay Stores site aimed to achieve the same vertical link, but proposed a much less public route to the town/dock via lifts within the building that would be enclosed, hidden from view and out of the public realm, requiring management within the building. As well as being less obvious the lift / tower would necessitate the construction of a large, heavily-engineered tower and cantilevered linking skywalk within the scheme proposals. Such internal private spaces for linkage are extremely difficult to make work.

Lubljana Castle funicular (Figure 10) is an interesting contemporary example of a beautifully-designed and functional piece of transport engineering that not only serves a simple function in linking the castle to the city, but has itself become a successful visitor attraction, carrying over two million passengers (2014) since opening in 2006. The nature, quality and positive outcomes of that example should be the aspiration here.



Figure 10, Lubljana Castle funicular

TRAFFIC CALMING ON A4076

From the base of the funicular, the route westwards into the regenerated docks needs attention. Extending past a more active north facing corner at the front of the Quay Stores, to activate this newly created route, the line will have to cross the A4076. In its present state, this is a barrier to effective pedestrian movement, with a steep blind corner and a street design that overwhelmingly favours motor vehicles, making it problematic for pedestrians and cyclists crossing into the docks. This is something that MHPA will need to resolve not just for the Quay Stores site but for the docks Masterplan more generally to maximise potential for pedestrian footfall and cyclists and making the link to the train station and existing town centre as easy as possible.

This is particularly important given that there will be pressure from highways engineers to widen the existing docks link to accommodate anticipated higher traffic volumes, which could result in increased vehicle speeds and an even poorer pedestrian environment.

There are various examples of effective shared surface schemes, one of the best (at an extremely busy junction) can be found in Poynton, Cheshire, where a shared surface scheme, delivered by Ben Hamilton-Baillie Associates (with whom we have links) has transformed a small town centre. There is a video online (which can be accessed via the resources page of the Trilein website: www.trilein.com) which is worthy of the MHPA's viewing. Figures 11a through c (overleaf) provide examples from the Poynton scheme, as well as a French town square, and the (less effective but notable) shared surface in front of Cardiff Castle.

Shared surfaces that keep vehicle speeds down by adopting a highway design speed (as opposed to speed limits and traffic calming measures), using shared surfaces that give pedestrians and cyclists equal priority, should be the aspiration throughout the docks site. This does not mean 'pedestrianisation' in the traditional sense – it is about striking a balance between the need for motor vehicle access and movement, and the needs of pedestrians and cyclists. The design should



Figure 11a – c, Shared space examples

seek to keep vehicle speeds low and favour a strong pedestrian environment. Getting this right is good for business as well as linking into broader sustainability themes, not least the wide array of positive socio-economic and environmental outcomes that can flow from greater levels of active travel.

GREEN NORTH-SOUTH LINK

A ‘north-south’ link should be created, using the old track bed that runs along the base of the river bluff. That line connects the train station to the rear of the Quay Stores site (and the foot of the funicular) and on to the docks through the tunnels – MHPA should seek to create a green corridor along that line, with potential for later enhancement either with ‘green house’ style enclosures and/or a ‘winter garden’ feel as a pedestrian and cycle link (potentially with some limited low speed vehicular access also). This can link with the existing proposals for Costa provided that the vehicle service route for Costa (which utilises this green line) pays strong attention to the potential for a through route for pedestrians and is conceived in a manner that gives pedestrians and cyclists equal footing to cars and prioritises the north-south line over the circular one. This can be achieved with a ‘shared surface’ treatment of the roadway there.

In addition, a more meandering ‘forest walk’ might be developed with switch-back paths and steps to reach the higher level for those wanting to take a more scenic route – it would create a circuit for dog walkers, runners and recreational walkers and could be publicised as such as well as having a mini nature-reserve feel to complement the green link below leading to the docks. It should terminate at the same point as the funicular at the higher level and, if possible, at the lower level also.

Given MHPA’s aspiration to purchase the train station car park there is potential to expand this link and create a linear park, perhaps working with a national partner such as NRW and/or the Eden project or similar to create an urban oasis featuring exemplar urban green infrastructure. This could create a cluster of activities, which combined with the funicular and MHPA’s wider sustainability initiatives creates a unique selling point for the wider development.

OUTCOMES FROM IMPROVED LINKAGES

We cannot overstate the importance of getting these links right, both to enhance the viability of the Quay Stores site and for the wider docks regeneration.

The effect on Milford Haven of a funicular, combined with a green link along the bed of the

former railway track through to the docks via the tunnels to the south, and a traffic calmed junction leading to the docks to the west, could be transformative.

Improved linkages as described would open up a range of possibilities to:

- improve ease of movement between amenities and shared facilities across the town and the Waterfront, particularly more effectively linking the train station with the town centre and waterfront;
- attract more visitors and local people into the town as well as down to the waterfront quayside;
- promote eco-tourism and ecological alternatives to conventional planning;
- provide a key visitor amenity in its own right, with strategic importance and a unique selling point;
- raise footfall through the Quay Stores site, enhancing its viability;
- raise land values and investment on the Quay Stores and adjacent sites;
- improve access to nearby cultural amenities surrounding the site such as the Heritage and Maritime Museum, Library, and the Torch Theatre further enhancing their viability;
- ‘siphon’ up visitors and tourists, increasing footfall in Charles Street that could in turn stimulate town centre regeneration; and
- encourage local residents to make more use of new and existing cultural and recreational facilities within the town and on the waterfront.

NEED / DEMAND

THREE

The following section summarises the key points that emerged from our consultative work with key individuals, supplemented by desk based work to explore some of these elements.

Overall, there is a desire to see the building and site brought into use, with a lot of interest in the scheme and plenty of goodwill. People were, for the most part, willing to engage with the study and, whilst there are some reservations (detailed later) the picture overall is supportive and constructive. Conversely, there are concerns related to the site's existing condition at the gateway to Milford Haven for rail-based passengers and traffic from the west.

NEED / DEMAND

Multi-functional hall

During discussion with stakeholders a range of cultural and community uses were explored, which indicate a demand for a multi-functional hall. The following sub-sections consider a range of cultural and community uses that the operators of such a multi-functional space would need to consider.

A large performance space

The original project proposals arose from discussions with the Torch Theatre and were

principally focused on a facility that offered a larger performance space plus the potential for additional cinema screening.

Although the Torch has had significant recent investment from Arts Council of Wales their existing 300 capacity venue is not big enough to attract bigger names (for example acts such as Max Boyce). In their current format the Torch can attract and stage those acts, but generate very little from the door-receipts as most of that income must go to cover the performer's fees and there is a limit in the market tolerance for ticket prices. The performer fee would stay the same with 400 seats and provides scope to generate a higher profit margin. The Torch is confident that it could easily sell an additional 100 or more tickets for these types of events each time but there is no scope to extend capacity in their existing location.

Cinema

There is potential for the Torch to grow if they could create a third cinema space also – major shows require you to take them for a fixed number of weeks, and by week 3 they're getting low audience numbers and the other space in their building is often showing a theatre piece or other non-cinema activity. A third space would allow them some additional flexibility. That has come from their film booker recently.

Live music

The Torch features live music events that are generally well attended, usually selling out. However, the provision at the Torch is fixed theatre-style seating and audiences want to be able to dance, and that cannot be accommodated in a fixed seating venue. A venue with flexibility to allow for this would be of interest to the Torch for this reason as well as the potential for increased capacity.

There is some evidence of a culture for acoustic night in pubs and, in the Torch's view, there are some good live music acts coming out of the town. There are not very many places to run any kind of music festival or a regular gig locally, and whilst there is no clear group through which to assess such demand, there was a sense from the Torch that there is potential to cater to an audience with a bar-based live music offer.

Alongside the desire from the Torch for a more flexible venue for the provision of live music, there may be scope to develop a live music focused venue. As with many of the elements within this study, this would be more of an entrepreneurial commercial proposition seeking to build a following locally (as well as to provide an additional attraction to visitors to the area) and create demand rather than a response to any strongly articulated need/demand at present.

Comedy

Related to the above, there are already successful comedy nights at the Torch with 'name' comedians. The Torch has identified scope for comedy nights (a Jongleurs/Comedy Club type event) where there are tables and chairs in 'cabaret' format, but this too does not work with people sitting in rows of fixed seating. Marketed well and coupled with a bar, alongside a live music provision, such events have scope to generate income with potential to approach more commercial levels of return on investment.

Theatre

The Torch provides adequate theatre provision for the local area. However, it is one of only a few producing theatres in Wales and rehearsal space is a problem for them – they need to rehearse their own shows but capacity within their building is limited, meaning either they have to go elsewhere to rehearse because the studio rehearsal space is fully booked, or they need to cancel dance classes and lose the income stream in order to accommodate their own show rehearsals. There are other reasonably sized venues in the local area, but none really provide the provision that the Torch would like for its rehearsal functions. The Torch rehearse for 3 to 4 weeks at a time and several times a year and so there is a relatively substantial part of the year where there is a need for additional

space, though the income generation potential for this will be relatively modest.

There are also various local amateur groups, Milford and Haverfordwest Amateur Operatic. The Torch cannot offer rehearsal space to these groups and there is demand for it. The Torch recognises a good amateur 'scene' for drama, dance and music (especially acoustic music) locally and these could be catered for further.

Dance

There is a significant dance culture in the area – more in terms of participatory dance than professional dance companies. The Torch is restricted in terms of what it can provide to meet that demand – they have one dance studio, which is booked out consistently. That studio cannot accommodate the need, which requires a sprung dance floor. A multi-functional auditorium in a new facility could be designed to also accommodate dance activities.

Gallery/exhibition space

There is a gallery space in the Torch but it is small and they recognise that it is something of a poor relation to their theatre function – they tend to be reactive rather than searching for exhibitions presently. They could do more with a larger space but as with most art galleries that are not based in major conurbations, this is not going to provide a commercial income stream.

There is the existing art gallery in the dock, which might be relocated, but again the income generation potential is very modest from gallery functions. The inclusion of a multi-functional space would allow for one-off exhibitions of art as well as more corporate exhibitions – trade fair style events and similar. These are likely to be infrequent, but would be an additional market sector to consider in order to diversify income streams for a large multi-functional hall and there are no other providers for larger floor space multi-functional venues presently in the nearby area aside perhaps from the leisure centre sports hall.

The above demonstrates that the Torch is outgrowing its current facility and in principle could run a complimentary facility that provided a multi-functional space to compliment and augment their existing provision if the finances made sense for them. They are confident that there is adequate audience demand for multiple shows and hires. That position fuelled the thinking for the original scheme proposed, and remains a need/demand.

However, reconciling the need for more space and the ability to make a separate facility work financially (both in terms of generating sufficient return on investment on the initial capital cost to the developer), as well as covering the associated revenue costs, will be challenging. The Torch as a publicly subsidised (albeit autonomous self-governing)

organisation would not want or be able to take major risks on speculative development. Were it feasible to add a larger space on to their existing venue then it would likely be a more straightforward discussion as much of the additional running cost could be absorbed into their existing overheads. But delivery from a separate building, even one very nearby, is a very different proposition and will certainly bring much higher operating costs (not least additional rental). The present need from the Torch is probably insufficient to generate sufficient return on investment for MHPA whilst being sufficiently cost effective for themselves.

So, to make such a facility work, it will need a wider range of uses, which are considered below.

Indoor sports

It was reported to us that there is insufficient indoor sports provision, with the Leisure Centre at capacity and many local sports groups struggling to find wet weather accommodation for practices/drills. Designing a multi-functional space to allow for use for indoor wet weather provision for small scale (likely junior and youth) sports practices would further diversify the potential user base. Again, though the income generation potential of such uses is going to be very modest – one of the reasons for sports groups looking for alternative space is the increase in costs of the 4G pitch to over £60 use when most are looking for around £20.

The income generation potential is therefore modest, though this does appear to be an area with some community demand (albeit one that might be better accommodated elsewhere).

Small community events

As well as use by the Torch for overspill activities, there is scope for a range of classes as well as various one-off community events at the venue.

There are other spaces in the near area that cater to 'ad hoc' hires (e.g. the Pill, church halls) and from discussions with various stakeholders we can be reasonably confident of demand for flexible space to suit a range of infrequent users. Types of use will vary considerably, from rehearsals, to meetings, to functions, to birthday parties.

The Pill Centre is well-used and nearly at capacity with few good quality alternatives that are available to meet demand. So, there are indications that there is scope for further 'ad hoc' users (birthday parties, occasional community group meetings and the like) to utilise a space.

In all cases the income generation from such activities is likely to be relatively modest in comparison to the capital costs of redeveloping the Quay Stores building. Assuming that the building facilities are well-conceived to meet

the varying needs of such a variety of users, and that they are well-marketed and affordable, there will likely be a strong demand for such an amenity. However, a reliance on this as the core function of a new cultural facility is likely to be insufficient to generate an adequate return on investment for MHPA.

Weddings and larger private functions

There are several venues within the wider area, accessible to the populace of Milford Haven and its hinterland that cater for weddings, with several of them high quality and well established. Whilst it would be difficult to argue that there is a shortage of venues or for the need for any form of public funding to provide one, nevertheless there is potential for a multi-functional hall to offer this and compete in the market as there are no high-quality venues with this kind of capacity in the very near area.

Corporate functions

Clearly, there is scope with the move of MHPA to the docks in the later phases, to provide a space within the facility for larger events and functions directly associated with MHPA. Additionally, there is scope for MHPA to host more diverse activities either directly or in association with others – users that it wants to attract to the waterfront for example for small

conferences, larger scale meetings, exhibitions or events.

Further, there is potential to market the facility to the wider region as a corporate venue, with attractions close to the waterfront. There are various options for the latter in the near vicinity e.g. the Cleddau Bridge hotel, plus the likely development of a hotel in the docks (two are planned, but with only one likely to provide this type of function), and the Torch (though it has very few ‘breakout space’ options). So, there is potential to compete in a commercial market for corporate functions but with existing and planned provision in the very near vicinity competing for what is likely to be a relatively modestly sized market.

As with wedding functions it is difficult to argue that this is a ‘need’ or that it warrants public funding towards the building given other existing and likely future options. But there is potential to diversify income streams by catering to these markets.

Recording studio

The Torch currently provides a small studio facility for bands to record, which is very much geared to the lower end of the market for ‘demo’ type recordings by unsigned, non-professional or semi-professional acts drawn from the local area. The client was interested in exploring a recording studio function at the

site – there is no evident strong community demand/need for such a facility and so it would be a case of entering the market to compete on the basis of finding an audience for it.

Recording studios are notoriously difficult to make profitable outside of large conurbations. Those that are located outside of large cities by necessity draw upon large trade areas to sustain themselves. Frequently, the approach by entrepreneurs in this industry is to select a good location, provide a strong user experience (not least a very good recording engineer to lead the studio initially), and develop a strong marketing presence and reputation for quality within a reasonable price bracket. That could be done, but would be establishing a business without a clear industry professional to drive it – one could be recruited potentially but it is a risky course of action for MHPA to pursue this without expertise in the area, and to create a space such as this for rent could be an extremely high risk strategy given the absence of clear demand.

The nearest competitor at the higher end of the market would be Mwnci Studios near Narberth – close enough to be a competitor (there are also several smaller studios catering to more localised markets in the wider region). Mwnci is a useful benchmark – its client base indicates a broad trade area and it caters to a wide range of users from ‘demos’ to bands at the professional end of the spectrum and

is successful, but would itself be unlikely to generate the sorts of returns that would be needed to cover its costs as well as generating sufficient return on investment for MHPA.

We do not recommend this as an approach unless MHPA were to find itself in the position of being approached by a credible entrepreneur in this industry with a strong business case assembled (which would likely be built heavily on their own industry experience and ability to compete in a broad trade area against established competition). At the time of writing there was no evident individual or company seeking space for such provision.

Seafarers’ centre

The Seafarers centre is currently looking for a new home and may provide a good fit for a redeveloped Quay Stores, providing a steady and reasonable volume of users as a ‘captive audience’. The seafarers are bussed into port and facilities that are needed are a comfortable place to sit and relax, near to a food and drink outlet (it will be principally non-alcoholic drinks given strict rules on drinking before re-embarking onto ships) with a good quality, free wifi provision. Numbers are around 3000 in a year, with between 250 and 300 per month, relatively evenly spread per day.

Previous incarnations of the Seafarers Centre have effectively been private clubs. However,

discussion with the person leading the search for a new Seafarers Centre indicated that a private lounge area with its own separate entrance and outfitted with comfortable seating, wifi and perhaps a pool table, that can access an adjacent (publicly accessible) café/bar would be adequate. Sufficient seating space for around 30 people at any one time in the private area should be adequate with scope for overspill into the bar area if needed.

The group is currently fundraising for a site of their own (they have used several venues locally since their own closed, but none are very satisfactory for various reasons). They are very interested in the Quay Stores proposals. They are unlikely to contribute significant rental or towards capital costs, but can provide a regular influx of paying customers to make a café/bar facility more viable at this location.

Meeting spaces

Milford Haven is poorly served with good quality meeting spaces. It is unlikely that there will be sufficient demand/purchasing power to make this a significant income generation stream, but it would make a useful ancillary function in a redeveloped centre and could double for 'break out' space for any small-scale conference style events that might be run at the venue. However, as with the wedding and conference functions (and indeed for most of the higher-paying end of the market for

multi-functional spaces) it must be considered that there are two hotel operators being sought for the docks redevelopment, at least one of which is targeting the higher end of the market and is likely to want to cater for these types of functions itself, creating competition for a finite audience and doing so within a (likely) very well resourced and experienced operation, which will give it a significant competitive edge.

Creative industries office/ production accommodation

There are no resident companies aside from the Torch's own theatre company that take space in the Torch. Arts Care Wales (who are based in Carmarthen) do all their work in Pembrokeshire through the Torch – they deliver Parkinson's Disease sufferers and other activities for disabled people. There is some scope potentially to increase this type of provision, but again this will not generate commercial income, will be largely grant reliant (and therefore prone to be volatile) and is likely to be relatively infrequent.

There is not much in the way of a more commercial creative economy locally, though there is a small co-working space in the docks, and the Art and Design section from Pembrokeshire College is quite large and many students do go on to develop their own businesses (though not in large numbers in Milford Haven).

Discussions with Pembrokeshire Association for Voluntary Services (PAVS) did not yield any strong leads for social enterprise or third sector demand beyond the more ad hoc uses described above – nobody that we talked to was aware of any group that were looking for a permanent home presently.

Retail

Whilst there may be scope for some supplementary (low level) retail related to a cultural function, Carter Jonas' recent South West Wales Regional Retail Study (2017) cites a declining local retail sector that is 'struggling' with limited demand likely for further accommodation within Milford Haven. Retail as an anchor use is therefore unlikely to be viable at this location.

Education and learning

Discussions with Pembrokeshire College did not demonstrate any strong need or demand for educational use whether 'mainstream' or adult continuing education/outreach activities. The College probably would be an occasional user of a multi-functional space and meeting room, but they are generally well catered for without any plans for expansion in the Milford Haven area. The College recognised the need for a larger multi-functional venue more generally for the area, though were uncertain of the level of potential demand to sustain such

a facility. Whilst educational uses should not be discounted entirely, they are likely to take the form of small-scale (and therefore modest income) community-provided activities, rather than from the formal education sector.

Hotel

The site would be a good candidate for a hotel: adjacent to the town centre (made that much more accessible by a funicular); close to the train station; and overlooking the docks, with a green corridor, perhaps a 'winter garden' to the rear. The site has several very strong ingredients that make it a strong proposition.

Audiences to the Torch tend to come from the Milford Haven side of Whitland – within an approximate 30-minute drive radius. From Fishguard and further onward there is a choice of going to Theatr Mwldan or the Torch within similar travel times – Welsh speaking audiences tend to opt for the former. So, much of the cultural audience base is within a short distance and this market is unlikely to translate significantly into hotel stays. However, in addition to this sub-regional audience, many visitors to the Torch have made the journey for some other purpose, perhaps coming from further away to do some other activity in the local area – coastering was an example cited, or similar – and then they discover that there is a theatre venue and go to see a show as a secondary function. So, some people are

coming from a distance already and looking for things to do, which a hotel adjacent to the Torch could feed off.

Travelling actors and shows tend to stay in private accommodation – most of the season is in the autumn so they tend to take advantage of holiday lets being empty – but there is potential to accommodate touring productions also.

The inclusion of a multi-functional venue in partnership with a hotel operator at this site, which would include a café/bar and/or restaurant, would make for a far more robust financial package and more viable business case for its development. Existing plans (one relatively advanced as we understand it from MHPA) led to this option being discounted early on and it is not shown in any of our drawn options for that reason. However, MHPA should still consider the site as an option for hotel operators interested in developing in the waterfront area, not least to preserve views of the waterfront from the surrounding area by putting a higher rise building against the river bluff.

Residential accommodation

The 400m walking circles indicate a low density of nearby trade within easy walking distance – which, coupled with the physical geography constraints of the site means there is a weak ‘captive audience’ for a development at the site presently. Increasing accommodation

within the near vicinity will fuel demand, and ordinarily would be a consideration for the site itself, with development of upper storeys for apartment-style accommodation taking advantage of the fine views overlooking the docks. MHPA have previously determined that accommodation will be sited elsewhere within the masterplan and this was also discounted early in the study as an option.

Whilst we have not included it in any of the drawn options for that reason, MHPA should also keep residential accommodation in mind – a good density of residential accommodation within easy walking distance is the key to developing thriving bits of town, and ‘above the shop’ residential accommodation is to be welcomed.

Additionally, MHPA should consider wrap around development on the northern end of the dock that uses the one (or more) storey height difference between the dock edge and the A4076/Hakin bridge/Quay Stores level at that point. Such a development there can create dock-facing commercial units at the lower level to take advantage of good aspect to the sun, with road-fronted residential units above, which have large south-facing windows and balconies at their rear overlooking the dock. The benefits of doing so would be numerous, not least building an immediate residential audience to fuel nearby businesses, but also to create a more human scale street

environment on the A4076. That would further underline the need for a more pedestrian friendly environment there, though that should be pursued regardless. There should be ample room to develop this whilst retaining the dockside promenade (at the tightest point a small section of cantilevered deck could extend the promenade area out over the water to create sufficient circulation room if needed).

The masterplan originally included plans to fill in the northern end of the dock and to base a large retailer there. In our initial discussion, we stressed the potential of the northern end of the dock as potentially one of, if not the best areas for the whole scheme given: its aspect to the sun; a relatively sheltered location within the mouth of the river valley; its group of fine listed dockside buildings, and its proximity to the train station and town centre.

Filling in the northern end of the dock would remove value by reducing prime water frontage. If anywhere offers a salutary lesson on such things it is the lesson from Swansea’s Marina development that took place in the 1980s where the initial infilling of the dock was halted and the infill removed (at great cost) and the new Marina created. Whilst the Marina development there has many flaws, the waterfront location clearly was a significant selling point and so infilling of fine waterfronts should be avoided if at all possible.

There are further cultural benefits of retaining the water body at that point in relation to the Quay Stores but also wider cultural provision within the broader masterplan – the latter is discussed in Section 5.

CONSOLIDATION OF EXISTING FACILITIES

There is potential for consolidation of existing cultural facilities – the Museum operates on a subsidised basis in its own space and the Art Gallery across the docks also occupies a prime waterfront venue generating modest returns. Additionally, the Local Authority presently leases the space for the library from MHPA and would consider relocation into a consolidated facility, but only on the basis that it would represent a longer-term cost saving for them. This would likely mean the Local Authority entering into a capital purchase of a facility or an up-front (‘capitalised’) long lease. This would free-up three buildings for MHPA, two of which (the Museum and Art Gallery) occupy prime waterfront locations.

There is an argument for siting several loss-leading cultural facilities into one venue, where their overhead costs might be reduced through sharing (not least by two small organisations sharing with the Council). That loss-leading

facility at the Quay Stores might then be offset by increased capital receipts from the development of the prime waterfront locations that would be released. However, this is rearranging several existing facilities rather than adding anything new in cultural terms, so unless there is a strong case to be made for releasing the existing Museum and Art Gallery buildings for redevelopment, we do not suggest this, nor does it feature in the drawn options in this study.

The maritime Museum is showing signs of increasing its offer, partnering with MHPA to deliver tours and heritage within the dock through grant- supported initiatives such as 'Discover Milford' that provide a more interactive and enriching visitor experience. Although a small, privately run museum with limited resources and income-generation, it has the potential to play a more important role in the longer-term regeneration of the dock.

Wales has a National Waterfront Museum located in Swansea incorporating elements of the previous maritime museum there, but not a dedicated national maritime museum; the Milford Haven museum, sited as it is in the heart of a working dock, could fulfil an expanded role certainly within a regional context but potentially nationally also, with the potential to expand the museum's display of exhibits, and to diversify into all aspects of maritime heritage, including construction and

repair of traditional craft and sailing vessels and the naval history of the area, on its present site or in a relocated facility at the Quay Stores.

A Feasibility Study for remodelling the museum with design options has previously been provided by iDeA architects to MHPA in 2014.

COMPETITION

There are some other relatively large spaces in the nearby area, notably: the local sports centre; the Pill social centre; and the Nelson. Each of those can accommodate a large birthday party, wedding reception or small scale ticketed event; but none are particularly suitable or accessible for the type of uses the Torch would want/need and certainly the Pill and sports hall are well used with relatively little spare capacity. There are smaller spaces such as the rugby and football clubs (both at the edges of the town), sea cadets' facility, and church halls, which cater for small events and activities (up to around 60 people seated).

The only target interview that we were unable to secure was Milford Youth Matters – we tried several times to contact them. However, it was clear from talking to others that theirs is a new facility, relatively recently completed and adequately catering for their needs at present. Even with potential additional demand for youth

(not expressed strongly by any respondents aside from the sport aspects mentioned previously) it was clear that the County Council would not anticipate, or look particularly favourably on, that project relocating any time soon.

There were some concerns over duplication/competition from respondents. The Torch has a strong provision and the Pill is well used and booked most of the time, and the study indicates additional demand, but there is some danger of a superior facility constructed at the Quay Stores taking some trade from these existing, previous local resources.

We were informed that the new part of the Torch Theatre was previously a community centre, and that the Milford Youth Matters facility does not have the flexibility that the building that the Torch has taken over in its expansion used to have. So, there does appear to have been some loss of more general community space provision that could be replaced with a new facility at the Quay Stores.

Further afield, Haverfordwest provides several venues, which provide competition for any audiences from outside the immediate area, and are sufficiently close to compete for trade from within Milford Haven for events and activities over a certain size, where a short travel distance will not be an issue. Haverfordwest is also presently the strategic focus for cultural activity by the Local Authority. There is also the

County Show Ground and various hotels and venues that are competing for the regional wedding, corporate function and meeting space markets particularly. Further again, the Queen's Hall in Narberth offers a facility that has a sub-regional/regional reach (depending on the product at any one time) and for larger events that require a regional audience to be viable is also a competitor.

COMMERCIAL VIABILITY

There appears to be adequate scope for a range of 'ad hoc' uses. In the sense of meeting a community demand, there is some demand evident from the public, private and third sectors but largely for infrequent uses. Notably, the Torch could make use of the building for a period of time each year, but this is likely insufficient to warrant them taking the whole building on – it is too great a risk given the uncertainties over demand.

Alternatively, the rental levels from the Torch making temporary block bookings for rehearsals/spill over events would not likely generate significant income (it would be the trading of a like for like cost base for the facilities they currently use when they have to find locations elsewhere). The one-off events have scope to generate some commercial scale income, but these are likely to be relatively

infrequent, not least as a strong event at the Quay Stores has potential to dilute audience numbers to the Torch's main auditoria at their existing site.

It is difficult to build a case for viability based on this type of use – it can be volatile with periods of high demand and periods with lower demand, and income generation potential varies from higher level income potential (e.g. weddings, corporate functions, use by the Torch Theatre for larger events) and a high frequency of low income, many of them 'one-off' users (e.g. rehearsals, birthday parties, community events). There would appear to be sufficient demand from the Torch with potential to supplement this from the wider community market to warrant the creation of a multi-functional events space, but on its own that kind of facility will be difficult to sustain financially.

The local population size and the population within a reasonably short drive time makes sustaining a facility of that size very difficult. So, return on investment is likely to be modest from a facility based on this type of use, and MHPA will need to allow for a long time-period to achieve a yield on the building's capital costs.

We discussed that MHPA could look at a much longer yield for its up-front capital investment of perhaps 30 years or more. Nevertheless, the income generation figures from this user group even with that timescale are challenging. There

is a tension, therefore, between the desire for a cultural facility accommodating a range of community needs and complementing the wider offer of a vibrant and thriving docks, and the need of MHPA as a developer to generate a return on a capital investment. The two are going to be very difficult to reconcile.

MHPA, in theory, can view the site in the context of the waterfront regeneration masterplan as a whole, so might consider a loss-leading development at the Quay Stores to generate visitor interest and act as a catalyst for future (more commercially viable from a return on capital investment point of view) developments within the wider masterplan.

If that were the case, then a multi-functional venue accommodating the range of uses identified previously might be explored in isolation with return on investment being valued in terms of:

- an enhanced community and cultural offer in the local area;
- an emerging cluster around the northern end of the docks;
- increased footfall; and
- development of a gateway feature that starts to link the docks to the town and northwards to the train station.

However, we recommend that MHPA look at a secondary user or users providing a more

stable income stream that would allow a cross-subsidy of a more volatile and difficult to sustain community cultural provision.

There was also no clear community demand for permanent space, whether for offices and/or permanent performance/exhibition/rehearsal provision. So, there are no clear cultural sector anchor tenants and there is no evidence of demand from the public sector either via the Local Authority (aside from possible relocation of the library but this would be a swap rather than 'new' provision) or Pembrokeshire College. Additionally, respondents saw no clear evidence of significant business demand for office space.

So, the most viable approach would be to seek an A3-type user (café-bar/restaurant) space that can generate a stable income stream that justifies the capital investment in the building. The Nos Da pub adjacent to the site appears to be struggling, which may be due to other factors, but is unsurprising given the site context we have outlined previously. It is not a welcoming environment for pedestrians and consequently there is low footfall to feed the type of business that a café/bar type provision relies on. Restaurants may attract more car borne consumers, but given that there are numerous (and soon to be far more) attractive waterfront options, many of which MHPA is already actively marketing, the Quay Stores (even refurbished) is still quite a tough sell to a restaurant operator presently as it represents

quite a high-risk proposition to an independent operator (and is likely in the near future to have a building site opposite to contend with on top of its location constraints).

The challenge, therefore, is that in the absence of a strong demand for cultural facilities that translates into a viable business model, and with the challenges that the site presents for A3 type users (café/bar/restaurant), MHPA will either need to consider a loss-leading provision at the site, or it will need to create the conditions to stimulate demand from potential A3 tenants.

By improving the site context to make activities at the site more commercially viable the value of the site will rise and it will generate a stronger return on investment. Do that, and there is greater scope to attract stable longer term users paying a commercial level of rent, which may then be sufficient to cross subsidise a more volatile multi-functional performance space to accommodate the range of community and cultural uses identified. Indeed, with work to its surroundings, as outlined in section 2, which would drive up footfall considerably, it could become an extremely enticing proposition indeed for the private sector in the long run.

SHORT TERM, MEDIUM TERM AND LONG TERM STRATEGY

So, MHPA should consider a short, medium and long term strategy for the site as detailed below.

Short term

Firstly, the building needs to be secured to prevent further degradation – for each period of delay the redevelopment costs are likely to increase given that its listing remains and demolition is neither desirable or practical.

So, in the first instance MHPA should safeguard the building by redeveloping it to shell using its current footprint and essentially repairing it largely as is, but with some additions (electricity and lighting, basic plumbing, internal stairs, adequate flooring and basic fire safety features). The capital cost of doing so is still likely to be relatively substantial.

An estimate based on a construction cost rate of £1200/m² and net floor areas as follows:

Quay Stores Warehouse Building

Ground and first floor: 530m²

Goods shed to rear

Ground floor: 270m²

A cost per m² rate of £900-£1200 per m² is envisaged to provide a ‘shell plus’ renovation of the Quay stores building envelope, providing core services / circulation layout, but leaving internal fit-out to others. The cost at this stage cannot be qualified without further investigation of the building’s structural condition and existing drainage/services, but taken at the upper limit estimated would be as follows:

Total net floor area: 800m²

@£1200 per m² = total cost £960,000

This figure reflects extensive work to the envelope, including:

- replacing the roof coverings;
- reinstate/ repair the roof carpentry and interior structure of the Warehouse building;
- re-clad the rear building and upgrade all the ground floors; and
- renew windows in the envelope.

However, the costs are far lower than a full redevelopment at this stage. The building can then be let on a low level – a peppercorn or potentially on a ‘profit share’ basis – for one or

more ‘Meanwhile’ users that will operate on a licensed use of the premises with easy in/easy out terms that suit the landlord (perhaps with a 3-month maximum notice period, but often such arrangements have just a 1-month notice period). The range of uses that the space can be put to is considerable (see examples in Figures 12 to 14 below) and allows for things to be trialled that might otherwise not be attempted due to their uncertainties.



Figure 12, A pop-up indoor food market



Figure 13, Oriol Science pop-up exhibition space by Swansea University



Figure 14, A small pop-up art gallery

Evidence of cultural regeneration projects demonstrates that the more entrepreneurial creative users tend towards facilities that are modestly priced at the bottom end of the market, and have easy in/easy out terms. Examples of culturally-led regeneration projects from Manchester’s Northern Quarter to the current regeneration of Swansea’s High Street demonstrate this pattern. In both cases the temporary users – many of whom become more permanent once they establish themselves – fuelled/are fuelling the area’s regeneration.

The Torch will be very interested in such a provision – it has very low risk for them, and allows them to be creative in the use of the space. The benefits to MHPA of this strategy are twofold:

- firstly, it establishes a cultural use of the site at lower cost (given that our view is that a full capital cost redevelopment here for purely cultural use will not be viable anyway at this stage) – this gives the potential to start building audiences and developing a

cultural cluster around the northern end of the dock, which, coupled with the medium-term provisions below, starts to encourage greater footfall and interest, making the site more viable generally; and

- secondly, if the Torch can begin to make the space work commercially, including potentially through running its own 'pop up style' A3 provision there (likely a café/bar rather than a restaurant given its pop-up nature) then it opens up the potential for negotiation between MHPA and the Torch to formalise the provision on a lease basis either using the building as is, or redeveloping on the basis of a more solid business case developing (a short term accommodation could be provided to maintain interest whilst the site was redeveloped if the redevelopment was likely to lose momentum).

Medium term

Secondly, the key connections need to be developed as detailed in section 2 with the goals outlined in that section in mind, principally increasing footfall in that area by significantly improving connectivity between the town, train station, and docks. Elements of this might be started at the same time as the above safeguarding of the building, but this phase will likely take longer to complete.

Shared surface junction

The improvements to the junction to the dockside on the A4076 are going to be incurred by MHPA anyway and will already feature in

phased planning for the docks Masterplan development. An early piece of work following this study should be to ensure that the detailed planning and costing for that junction includes the requirement to make it a pedestrian friendly space with shared surface.

This may increase some costs in the short term, but evidence from across the world demonstrates that such investments are good for business and will generate returns on investment in the longer-term through an improved public realm, which when aligned with improved footfall, is in turn good for business.

That connection must be conceived to allow for an easily navigable straight-line pedestrian linkage from the bottom of the proposed funicular link up to the town centre (even if that comes at a later stage), across the northern elevation of the Quay Stores, and down to the dockside.

That straight-line route to the dockside might then be continued across to the far side via pontoons, or perhaps over a weir or similar feature that traps water in the northernmost part of the dock creating a pond (Figure 15). This gives potential for other complementary features that are outlined in section 5.

As the regeneration of the waterfront proceeds it is essential that the dockyard entrance is improved and treated as a 'gateway', with potentially significantly more traffic entering and leaving the dock.

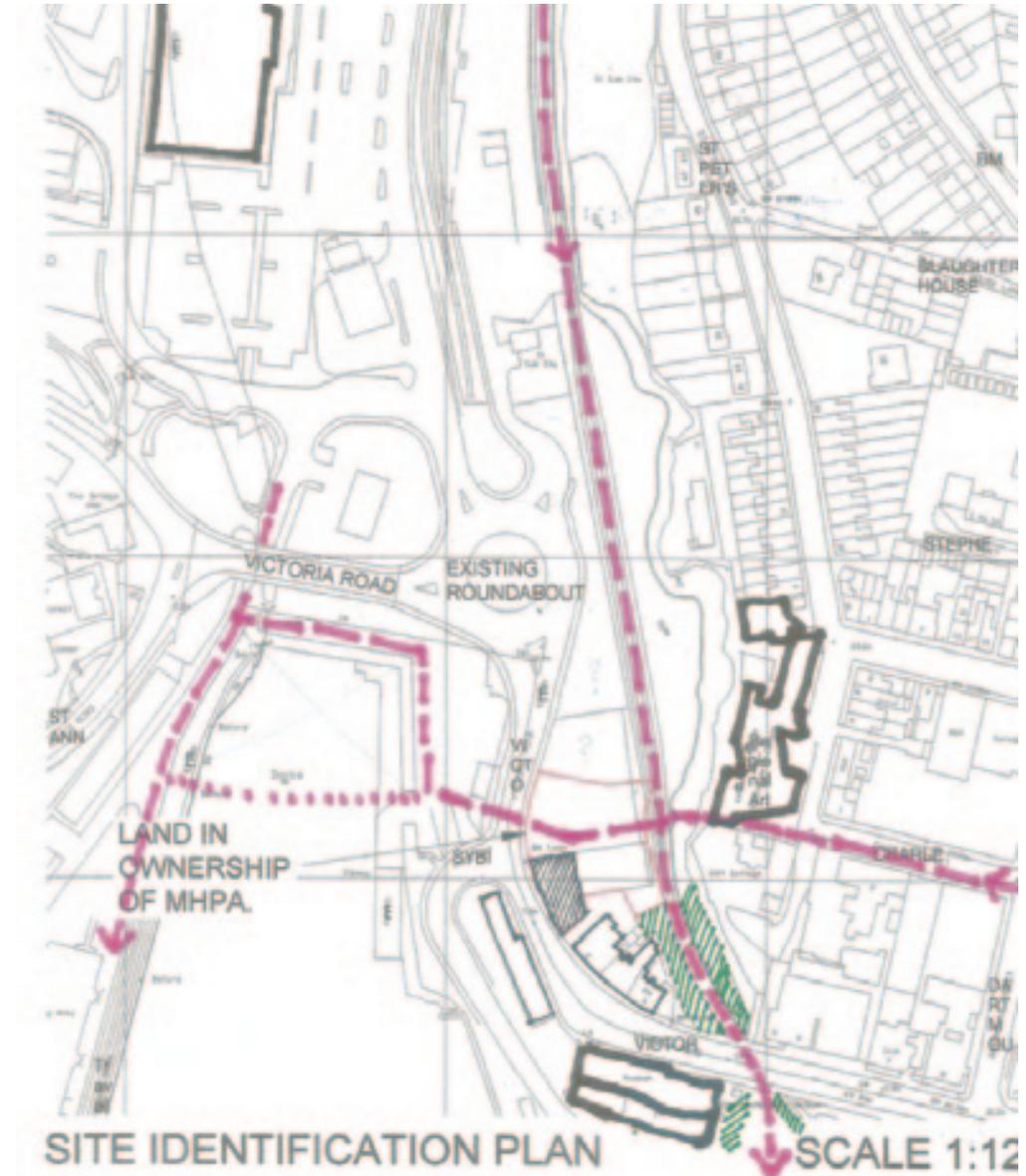


Figure 15, Connection from Charles Street, via funicular and Quay Stores, and crossing the docks

Previous schemes have grappled with the problems associated with the junction from a more typical ‘highways’ and ‘traffic flow’ perspective, such as road widening schemes, to the point of altering the essential character of the place, its historic quality and built heritage.

Rather than treating the road improvements as the primary design generator, to the point where listed buildings have to be removed and re-sited, the ‘shared space’ approach is a genuinely innovative alternative that accepts the existing constraints and looks at how to bring about an attractive solution that is good for business as well as the environment. This will enhance the waterfront’s sense of ‘place’ and the unique qualities of the harbourside.

Green link

The costs of establishing and maintaining the green link from the station can in part be wrapped in with the Costa development as that will take up a section of that route. It is imperative that the car circulation space for Costa that uses part of the former rail track space is conceived as a pedestrian and cycle friendly routeway with a through-route (unfenced) to the train station in the north. Ideally, this should be a shared surface space and should certainly maintain low motor vehicle speeds by design so as not to prejudice through connections.

The remainder of the route might be developed in phases, potentially as a community project to develop it as a green space. The section to

the south running to the rear of the Quay Stores building will be difficult to maintain without opening-up the tunnels to the docks and the security (real and perceived) of that routeway will be directly influenced by the buildings in front overlooking them. The redevelopment of the Quay Stores to shell should ensure that there is good overview of that area. The urban form there is not ideal in that there is insufficient space to create a ‘block’ with active frontage on both sides of the buildings overlooking the public space, which should always be the aspiration.

So, design of the refurbished Quay Stores must consider the need to overlook the space to the rear. Allied to that should be an inclusive discussion held with building owners between the Quay Stores and the bend of the A4076 leading up to the town, potentially offering them some incentives to change their rear facades to better overlook that area. Although modest in the overall masterplan, this stretch of the green link has scope to be problematic if such measures are not taken, and it should be a subject of some detailed design in its own right.

Funicular

The funicular is the most challenging of the three to fund, but also has the strongest fit with MHPA’s positioning to become an industry-leading provider of self-sufficiency for energy. There are examples (for example at the Centre for Alternative Technology at Machynlleth) of water powered funiculars, and there is potential for MHPA to bring to bear its expertise in sustainable energy systems to develop an

exemplar project for the funicular with the aim of making its operation energy neutral. That also has a strong fit with the recently signed City Deal and the aspiration to create a more sustainable and energy efficient city region.

This is a specialised issue and needs its own feasibility study, but there are likely to be sources of specialist funding that might be able to support such a development, including innovation funding sources, particularly if linked with the region’s universities.

Getting this right has the potential not only to create a tourist attraction due to its nature as a (rare in Wales) funicular, but also as one of very few examples that are ecologically friendly and potentially energy neutral.

MHPA could explore partnering with stakeholders in the town, for example: Milford Haven Town Council who could fund a stake in the project through a long-term mortgage loan over, say, fifty years that would give them ‘ownership’ (real and civic) in being part of the new future proposed for Milford Haven. Such a partnership would engender cooperation and create innovative opportunities for the community to take an active part in a wider project for regeneration that is not only centred around commercial redevelopment of the waterfront, but is linked physically to the town’s commercial centre in Charles Street. This may be one of the best ‘wins’ over time.

These three developments do not have to be

completed concurrently, and might be phased over a period of time.

Long-term

The above provisions combine to make the Quay Stores site far more commercially viable, and will likely make the site more attractive to one or more commercial ‘A3’ users, as well as potentially creating the conditions for more established and more commercially focused creative entrepreneurs to recognise its potential. Section 4 considers options for the built form of this longer-term use.

This strategy does represent a relatively costly up-front investment with a very low short to medium-term return, but it creates the potential for a more significant long-term return on investment both for the Quay Stores site itself and the northern end of the docks. In our view this approach is more likely to provide a more viable end result for MHPA to achieve the vision for the site whilst remaining commercially viable.

The above is based on the requirement to generate a return on investment for the Quay Stores site. If MHPA is willing and able to take a greater risk on the site and accept a low yield over a very long term, then it may wish to pursue the full development of the site from the outset and put it out to market, on the basis that it may take time to get traction on the commercial elements.

SITE DEVELOPMENT OPTIONS

FOUR

Following on from the site context analysis and the need/demand section previously, this section provides some commentary on the previous proposals and several suggested alternatives for the longer-term redevelopment of the site.

TORCH ON THE QUAY PROPOSALS

The 'Torch on the Quay' is an initial 'concept' design proposal to re-develop the site that has been drawn up prior to this feasibility study being commissioned. The Architect's proposed scheme drawings consist of floor plans and sections, and provide the basis for assessing the scheme here, as part of the feasibility study. The drawings have been provided in pdf format and are numbered as follows:

- Ground Floor plan 8794/ P01
- First Floor plan 8794/ P02
- Second Floor plan 8794/ P03
- Third Floor plan 8794/ P04
- Section through building 8794/ P05

The drawings scale 1:200 at A2 size. They are attached in Appendix 1.

Areas have been measured and estimated from A4 reductions using the scale bar provided on the drawings.

Scheme details

The scheme retains the 2-storey warehouse on Victoria street, converting the interior space into a craft market on the ground floor with a small theatre on the first floor above and replaces the rear goods shed with a new development which is part of a large theatre and cinema complex that occupies approximately three quarters of the site area.

In terms of its design the proposal is a bold scheme that responds to a brief to provide a 400-seater auditorium, and to use the building's height to create a link between the Quay Stores site/ Victoria road and the Torch Theatre and Charles St.

To achieve the height necessary, a cantilevered rotunda is placed above the first-floor auditorium and foyer, over-sailing the Costa car park and service road to the rear of the building. From here a bridge link is included connecting to Charles Street and to the foyer of the Torch Theatre via a new link corridor. A flood-lit metal sculpture inspired by the Torch logo is proposed for the roof of the rotunda.

The net floor areas are as follows:

Existing warehouse: 265m²
New build: 785m²
Ground Floor total: 1,050m²

Existing warehouse: 265m²
New build: 805m²
First floor total: 1,070m²

Second Floor: 248m²

Third Floor: 56m²

Total Scheme incl. exg. converted,
@net floor area: 2,424m²

Proposed uses

Proposed uses relate largely to entertainment with some retail as follows:

Ground floor

The ground floor proposals incorporate:

- an entrance Foyer/ performance space;
- artist/craft/jewellery market; and
- two-screen cinema.

First floor

The first-floor proposals incorporate:

- 392 seater auditorium/ multi use theatre; and
- 102 seater theatre / cinema.

Second floor

- Café
- Glazed link

Third floor

- Theatre Bar

The scheme aims to be an icon for the waterfront development and a significant addition to the townscape. Any iconic scheme requires a high standard of finish in the construction detailing and materials specified and as well as this there is a significant additional cost in relation to the circulation link up to the Torch Theatre and Charles Street.

The rotunda and bridge link generate a high proportion of:

- additional surfaces;
- circulation space;
- specialist structural engineering; and
- specialist foundation groundworks on the hillside.

All of these will contribute to increasing the overall cost per square metre of the new building in relation to the overall scheme.

It is difficult to put a figure on these proposals without further input from specialist consultants but clearly this project is a multi-million pound scheme, likely to cost in the region of £3.5m to £5.5m. This is a huge capital investment to make, unless the needs/uses are clearly determined, with an end user in place and project incomes/revenue are deemed to be sustainable.

Comments on scheme feasibility

The scheme includes some mixed use in the form of:

- a craft market;
- bars;
- restaurants;
- multiple use performance spaces; and
- cinema.

Elements of the scheme are reflected in the discussions we have had e.g. the need for a larger performance space and some ancillary cinema provision to augment the existing offer of the Torch as an ‘overspill’ space. However, the provision shown in the scheme represents a very substantial increase in local provision and there is no evidence of the level of demand for such a large-scale increase in cultural provision locally or regionally.

Furthermore, much of this duplicates the existing provision in the Torch Theatre itself and the consultation undertaken in this study reveals that needs/ demands are at best moderate to conservative. Nor is the Torch likely to be interested/able to deliver a facility of that scope given the uncertainties around demand. The Arts Council are likely to be supportive of the Torch taking on further activities that enhance its viability, but are unlikely to support a separate, substantial venue with large scale capital or any significant revenue

funding support. Such a facility if constructed would risk significantly undermining the Torch Theatre’s viability if this were to be run by a separate operator.

This may change in the later stages of development within the docks masterplan but this project is to be undertaken in the first phase and there may simply not be enough of a requirement for a large flagship scheme to begin with.

It is difficult to see how the Torch on the Quay scheme could be broken down into phases that can start small and grow organically with the improving climate footfall in the dock. Ideally, the link to the town should be capable of being constructed without having to build the entire scheme as this is a key to raising the footfall and the value of this site location within the larger masterplan proposals. However, with this element incorporated into the overall building that will be difficult to achieve cost effectively.

The high-level connection to the town centre via a lift and stairs and bridge within the building are problematic for reasons other than capital cost. Such connections of public spaces via private space are very difficult to make work and there are few good examples of such linkages functioning effectively as a means of promoting pedestrian through-flow for the purposes of connecting two urban areas (as opposed to just serving the building itself).

Overall, the building is impressive in its scale and ambition, but does not explore the wider strategic potential to create a piece of urban design that could link the town with the harbour waterfront, and the railway station. The inset square is attractive but the potential for a green link route via the track bed is lost as this becomes a service road into the dock.

It is not obvious how this scheme as proposed would meet the Torch’s current needs without imposing a significant liability to make it pay. This could prove a fundamental weakness, preventing development in the first place, or worse a built project that fails in use. A more adaptive and flexible offer could achieve all that the ‘Torch on the Quay’ offers but in a way that is more sustainable and fits with longer term objectives, given the location and the current economic climate in the locality.

For these reasons, the previous ‘Torch on the Quay/ scheme is not viable in our view. The next section provides some detail of varying alternative options for the development of the site.

SITE DEVELOPMENT OPTIONS

We have outlined in the previous section that in the short-term an ‘outfit to shell’ or perhaps

better described as ‘shell plus’ may be the most viable course of action. However, we note the longer-term potential of the site if the other aspects that we are recommending are put in place. Given that we are beginning to look much further ahead, and the outcomes of the short and medium-term developments need to be assessed first, it makes a detailed modelling of the long-term income potential from the site problematic at this stage.

A series of 5 options has been developed that indicate how the site might be redeveloped in the longer-term, reflecting several different scenarios as follows:

Option 1: Music Venue and bars

This option is conceived with a phased development of the site in mind, and in particular with the short term strategy – fundamentally, to undertake essential works to the structure and shell of the building that will arrest it’s deterioration and provide a new venue for the light-touch, pop-up uses mentioned in the short term. A music venue fits this ‘meanwhile approach as the type of use-activity lends itself to a basic even austere interior, and can even benefit atmospherically from a basic no-nonsense standard of fitout (Shell+).

This option makes use of the drive-in Costa development's roadway, to provide safe vehicular access to on-site parking. The car park is envisaged as a temporary low-cost installation using compacted gravel and existing concrete surfaces in the immediate for immediate use. Delivery/ access is from the rear former trackway via the tunnels to the south and/or Costa and surfaces should be conceived and designed as part of the north / south greenway from the start.

The interior rear goods shed provides an intimate auditorium with stage and backstage – the warehouse ground floor is given over to a bar and foyer space that has direct visual sightlines into the auditorium and would be used as audience overflow space. There is a separate lounge area off the main entrance that could serve the function of the Seafarer's drop- in centre and/ or private parties.

An additional bar is provided at first floor with gallery viewing down into the venue auditorium.

Option 2: Restaurant with beer garden and Funicular

This option shows one of the possible approaches described above to undertake a shell+ repair and renovation of the envelope with services and core internal elements and then offer this to the market – in this case a restaurant chain.

Wetherspoons have a good track record of working with and making appropriate use of interesting historic buildings and would be a good choice in this location, if they (or another commercial operator with similar characteristics) could be persuaded to come into this location ahead of future developments in the dock. The USP and increased footfall generated by the funicular is seen as a key incentive for this to happen. The funicular makes walking to the restaurant an attractive option for town-dwellers but also would link two existing car parks in Charles St and Robert Street, both within a short walking distance of the funicular, as well as audiences from the Torch Theatre, looking for a convenient place to eat and drink before and after performances.

Although new restaurants are being proposed within the masterplan in waterfront locations that will supplement an already-existing provision, the offer at Wetherspoons is an affordable one within a family-friendly environment that also caters for drinkers, and this would appeal to a wide demographic of local people in the surrounding community who presently would have to travel out of Milford Haven to Haverfordwest. This could be seen as a real benefit of the developments among the indigenous population.

The car park is upgraded to form a gated public space with outdoor seating in a garden that would provide a sense of enclosure and

design whilst retaining flexibility for future development on the site.

This option lacks any cultural centre but there is scope to provide some of this within the building at first floor and in future development on the open space given over to the garden, shown in the following options.

Option 3: Music venue+ café/restaurant and tourist information/ cycle hire

This explores possibilities to develop the open area on site and combine new uses –such as a café / restaurant, and information visitor centre with an already existing use – such as the Music venue in the Quay Stores. There are derivatives if this but essential a combination of new and would enclose a public space that reinforces the route fro town to waterfront and develops the notion of a gateway as a new piece of urban design in Milford Haven.

The visitor amenity is sited strategically equidistant between the railway station, harbour / waterfront and the town.

The funicular not only creates the walking link but would afford visitors a spectacular view of the harbour and Quay Stores below. Looking down onto the site, passengers would

view an attractive rooftop garden serving the restaurant /bar that maintains the feel of the natural wooded bluff.

In this option the site is easily divisible between users and this would allow flexibility whilst retaining the public route through to enter the waterfront harbour.

Option 4: Restaurant + Studio rehearsal / performance and information centre

Option 4 is a development of Option 3 in terms of the amount of new build on the site.

In this instance, the restaurant option for Quay Stores is combined with a new multi use rehearsal / performance space with a foyer entrance facing a small piazza overlooking the harbour. The tourist information centre is retained in it's strategic location on the highly visible street corner of the site.

The covered space is vastly increased with a glazed / or membrane structure over the public routes : the north-south and east-west routes at the crossing. This allows free movement in both directions through a gallery / arcade 'wintergarden' encompassing the funicular station and allowing possible further

uses relating to naturally lit covered areas – such as food markets / antiques fairs/ music performances that could create a programme of uses/events of interest to visitors as well as the local community.

Although the route and approach to the dock is partially enclosed – strong visual links to the funicular are maintained through a lightweight / transparent arcade structure. As in previous options the gated piazza can be controlled and closed after use in the early hours of at night-time.

Option 5: 400 seat venue / performance studios and information centre

This option is presented to show how a 400 seat venue might be achieved that would satisfy a possible demand for larger shows and acts with national names. This came out of discussions with MHPA at interim stage to explore the possibility of a venue that would match the capacity of the original design scheme (Torch on the Quay proposal).

The 400 seating capacity is achieved by oversailing the main auditorium above the North south public route at first floor level and abutting it against the Quay Stores goods shed on the north elevation. This creates a gallery orientated along one side of the hall at right angles to the stage.

The tiered seating at ground floor is retractable to provide a large flexible multi use space for a wide variety of uses described in the uses section above.

As well as the main space a smaller more intimate studio rehearsal space is included with the tourist information facilities brought into the main foyer space where cycle hire, tourist enquiries and tickets for the Funicular would all be handled from the reception desk.

This option has the advantage of combining the amenities and function /uses catered for within the converted Quay Stores in a more fluid and flexible way that could pollinate and enhance some of the range of uses investigated in the Section 5. For example in providing a large conference venue strategically located in the heart of the waterfront development.

The scheme as drawn maintains the new public space piazza off the road but the bulk of the development will block immediate views of the Funicular from the road, and the walking route through the building could be claustrophobic unless it is handled cleverly architecturally. Light well shafts are proposed as part of the solution. As well as this, the building will need to be operated so that the east- west route through can be monitored or temporarily closed during performances.

There are numerous example of arcades and some buildings such as Senate House in London where public space and right of way is included in the building's design. Senate House designed by Charles Holden for the University of London and built in the 1930's, was the tallest hi rise in London at the time. The building has an interesting double height foyer that straddles a former road and through which public access is maintained.

In this option restaurant use is proposed within the Quay Stores at ground floor level, with an arts/ exhibition gallery at first floor above, though it might equally be some other type of A3 user such as a pub as mentioned in other options or a café/bar. This option includes a galleried mezzanine above the dining area in the goods shed that would share the interior space, connecting visually and potentially allowing diners to visit the gallery as part of their dining experience, giving the restaurant an added USP. This space can in turn be linked to the main auditorium if required.

Option 5 represents a potentially exciting long-term development but this should be subject to existing needs identified or in lieu of these, creating these as part of the longer term vision for the waterfront.

Indicative capital costs for these options are included in Appendix 4.

BROADER CULTURAL DEVELOPMENTS

FIVE

This next section considers wider themes that MHPA should consider both to enhance the prospects of cultural facilities at the Quay Stores site, but also for its waterfront regeneration masterplan more generally.

DEVELOPING 'SOFT' CULTURAL INFRASTRUCTURE

The waterfront regeneration masterplan represents an ambitious undertaking that could transform the town. Inevitably with such developments the focus is on the built form, which is clearly important but can give a lack of emphasis to the need to regenerate the 'soft' infrastructure of the local area – to use a computing analogy, there should be a focus on the software as well as the hardware.

Milford Haven is struggling as a retail destination and is likely to continue to see a decline and consolidation of a more traditional retailing base. It needs to reinvent itself and the docks redevelopment demonstrate a significant shift towards a more leisure-focused offer. The cultural component of that leisure offer has at its core a strong, established, respected provider in the Torch, and there is a stable

(insofar as we are aware) library and sports hall service provided by the Local Authority, plus community-run facilities at the Pill and in Milford Youth Matters for example, which are sustaining themselves.

There are then more fragile provisions, such as the Museum, which are being kept going by enthusiasm and sterling effort by the community but that are very difficult to sustain. There is modest activity in the form of small festivals or special events and this could be built on. MHPA sponsor a fish festival, which indicates the potential of such activities linked to place and this kind of support for local activity should be enhanced and developed around a strategy (rather than being reactive to demand if and when it arises).

MHPA should take the lead, partnering with the Local Authority, and work to encourage cultural creative events and activities to take place in public spaces created by the masterplan. That needs to take the form of four broad areas of support, which are detailed in the following sections.

INFRASTRUCTURE TO MAKE EVENTS AND ACTIVITIES EASY TO ARRANGE

Firstly, design of the urban realm should allow for such uses, which includes creation of shared surfaces that clearly demonstrate that tables and chairs can spread out, that events can take place in public space, and that people can wander with motor vehicles having to take care and travel slowly and carefully. Additionally, relatively simple provisions, such as outdoor power sockets, lighting, and thinking about the placing and orientation of seating can make a big difference to enhancing the viability of small community led events by reducing the costs of brought in event infrastructure.

MHPA might also encourage activity through the provision of some modest portable infrastructure, for example: having a portable distribution board and cabling along with relevant covers for powering outside events; purchasing gazebos suited to outdoor use; having anchor points for, and providing temporary awnings (sails and other temporary structures) to allow for audiences and

performers to sit under cover in the open air when it rains; and having lighting designed for easy adaptation in places where performances might be staged.

The cost of equipment for such things is modest in comparison to MHPA's budget, but it need not necessarily be made free. However, it should at most carry a modest charge to cover wear and tear and replacement rather than being seen as a means of income generation – the payback to MHPA is generating as much cultural activity in the public realm as possible.

A 'meanwhile use' policy for any empty spaces within MHPA's control could be developed as described for the short-term option for the Quay Stores building – encouraging (favouring) cultural/creative uses for any empty spaces.

That may need some capacity building to bring forward people able to adapt such spaces, but it can bring vibrancy by generating footfall and creating a 'buzz' that starts to change perceptions of what Milford Haven has to offer. It will also generate a greater critical mass of cultural providers and creative entrepreneurs (many of whom are only likely to operate at a small scale commercially but are nevertheless vital in driving forward a range of cultural activities). Forming links with Pembrokeshire College and potentially with University of Wales Trinity Saint David (who are based to the north in Lampeter and to the east in Carmarthen and Swansea and who draw

a number of their students from West Wales) could help to drive this.

More ambitiously, the proposal in Section 2 to create a weir with a through route over the northern edge of the docks, and in so doing creating a 'pond' there at the very northern end, gives a unique opportunity to develop a 'floating' stage. Figure 16 shows the floating stage at Bregenz – the proposal for Milford Haven would of course be a far smaller scale facility extending from and serviced via the weir with the audience sat on the shore – it would need to be looked at in detail but the basic premise would be to provide a base that is designed for this type of use to make it

easily adaptable (and therefore less costly) by set designers.

Shows might operate in the summer with the base for the stage an extension of the weir that is accessible to pedestrians when not in use for shows. When combined with one of Wales' few producing theatres in the Torch this creates potential for a one-of-a-kind provision in a stunning setting that starts to create a unique selling point for the docks and, with commercial units facing onto this area (with accommodation featuring dock-facing balconies above) has all the makings of a space evocative of some of the great European city waterfronts.



Figure 16, The floating stage at Bregenz

A USER-FRIENDLY REGULATORY PROCESS

Additionally, MHPA should work with the Local Authority to establish a clear set of processes to make it as easy as possible for people to do things that enliven public space, from removing any costs and minimising or removing restrictions for placing tables and chairs out front of cafes and restaurants, to providing a simple and straightforward licensing regime (or de-licensing where possible and appropriate) certain activities.

The simpler this process can be made (including consideration of scope for negotiated public liability cover perhaps through MHPA's insurers) for such events then the more likely it is that people will begin to undertake them.

TARGETED FUNDING FOR CULTURAL EVENTS AND ACTIVITIES

Thirdly, MHPA should consider establishing a dedicated funding stream, founded with its own funds but using these to lever in support from others, including sponsors and grant funders. Some elements of Section 106 funds from various developments (whether in the docks or where MHPA is developing sites elsewhere in the near area) might, in discussion with the Planning Authority, be allocated to a central funding pot.

Further, suppliers to MHPA and businesses that MHPA is attracting to the docks can be encouraged to contribute (in exchange for recognition) to a central funding stream. That funding stream should be focused on outcomes – the key things that MHPA wants to achieve. Some work is needed to refine those, but they might be events that are specifically focused on: increasing footfall at certain times and in certain locations; improving user experience of existing visitors; that complement dockside businesses; that contribute towards place

promotion efforts of the dockside as a tourist and visitor destination.

Such a fund should be proactive as well as reactive – some funds can be set aside for others to bid to (within a set of parameters) but others might be used to commission set events. A programme will require some more detailed thinking and a strategy but it should seek to build on local heritage and strengths. Initial thoughts might include one or more of the following or similar:

- an event or events that build on the history of Nelson's link to the town and its continued international relevance;
- an event or events that reflect the international nature of Milford Haven as one of relatively few places in Wales that has global connectivity through its industry;
- farmers/craft markets;
- trails and celebratory activities (perhaps linked to the museum) that provide walks for people to undertake as visitors with accompanying guides and various information points (which might also make use of digital means of interpretation via smart phones as well as the more traditional signs and plaques);
- public art commissions around key themes that are strongly linked to place and with an emphasis not just on their qualities as art but on their contribution to the urban realm (e.g. sculptures that can be climbed and played on by children that are also beautiful or thought provoking;

- a general arts festival, using indoor venues but encouraging outdoor events at various locations and incorporating and building on the strength and reputation of the Torch as one of few producing theatres in Wales – consider the success of the Michael Sheen Passion in Port Talbot; and/or
- a waterfront lighting festival – a son et lumiere type provision (Figure 17) that focuses on the maritime setting. Again, getting the infrastructure for such things in place up front at design stage will dramatically reduce longer term running costs.



Figure 17, A Son-et-lumiere-type lighting event focused on the water

Whilst the focus will clearly be on the dockside, MHPA should consider a strategy that includes the town centre and the docks to build a sense of place of Milford Haven overall as a cultural and leisure destination. The strategy will need to take into account the current emphasis on cultural regeneration in Haverfordwest and seek

to offer something different but complementary so that each can build on the attractions and strengths of the other given their proximity.

Every event should focus on achieving benefits that contribute towards building a sense of place and benefitting local business (those that MHPA is seeking to attract to the waterfront but also those existing businesses in the town). MHPA is already recognising this with the fish festival and power boat event.

Depending on MHPA's internal capacity, it may be that this will need driving by a wider stakeholder group with a small group of experienced and creative providers driving the process, potentially with some initial outside support to assist shape it. Certainly, as Pembrokeshire County Council begins to develop its cultural strategy (as is likely as a legacy following the current City of Culture bid for St Davids, regardless of the bid outcome) MHPA should lead in shaping the view of the potential of Milford Haven as a cultural destination for year-round events and activities.

Get that right and it will make business more viable for hotels, restaurants, cafes and the like that MHPA is wanting to attract and will want to see thrive in the newly developed waterfront area.

BRAND AND MARKETING

A place promotional brand and related marketing campaign that sells Milford Haven overall as a destination should be developed. It should also focus an internal as well as an external audience – local people are often overlooked in place marketing campaigns, but evidence of people visibly loving their local area can be enormously powerful when conveying a sense of place. You cannot deliver a regional, national or global cultural place brand without also being credible and viable locally.

A creative interpretation (perhaps commissioned, or perhaps run as a competition) of some form of 'I heart Milford Haven' would be a good element of this. This process will have greatest strength if it is a collective effort (albeit one that is perhaps largely fuelled by MHPA as the largest local partner). It should certainly involve the Torch and other key local providers in co-producing it.

In the short-term the target will be an existing and very strong West Wales tourist economy as well as day visitors from within the region and likely focused on the summer months in the first instance, but it can then be built to develop a much wider reach and incorporate more winter activities.

CONCLUSION

SIX

The study has demonstrated the constraints but also the potential of the site with some interventions. It has the scope to be a key gateway and nexus that links the town to the docks and the train station. It is at the edges of the 400m walking circles for existing residential populations but could be made the centre of key movement lines for visitors and tourists to the town.

There is a tension between the desire for a cultural facility and the need to generate a return on capital investment. The viability of a culturally focused facility is questionable given that cultural and community demand is largely going to be ad hoc and/or with modest income generation potential.

The study has considered a likely tenant mix and demand for a cultural facility at the Quay Stores site, concluding that evidence of need/demand exists but is commercially a relatively weak proposition in terms of generating a yield from a capital investment.

Accommodation and hotel provision on upper storeys at the site could have made it more viable to generate income from upper floor uses that then cross subsidises principally cultural facilities at lower levels that are likely to generate very modest returns. However, residential accommodation and hotel uses were discounted at an early stage by the client due to the intention to accommodate them elsewhere in the docks masterplan.

An A3 (cafe/bar or restaurant) type user could generate the income generation through rental needed in order to cross subsidise cultural uses from the site, but the site is presently not that strong a proposition to such providers, not least given the numerous other options on the waterfront as well as other vacant properties through the town.

Funding options are very limited given a relatively weak community demand – it is not that there is no demand, rather that it is not particularly strong and also there is provision locally that can cater in some way to much of it, with some concerns about potential for duplication that are not easily countered. Any bid for funding is going to need to demonstrate long-term financial viability, which is questionable absent of a commercial anchor tenant, and if the focus of the facility is to secure an anchor tenant from the commercial sector then a good funder will question why the subsidy is required.

More commercially-focused economic regeneration funds such as the Welsh Government's Vibrant and Viable Places funding are focused on economic regeneration (rather than community or cultural regeneration schemes) but VVP or similar funding is not currently available in Milford Haven. There may be more targeted regeneration funding to replace European Structural Funds once Brexit negotiations have concluded and the UK leaves the EU, but there is no indication of the shape

or nature of these presently. Further, there may be scope to build on the City Deal for the City Region in the longer-term as the success of the core functions of the City Deal can work to lever in ancillary functions. MHPA should also maintain awareness of, and do what it can to support, the efforts of the Local Authority in developing a City of Culture bid for St Davids and any legacy from that process.

Given the volatility of the ad hoc users coupled with a relatively weak demand in commercial terms from the cultural perspective, we discussed and agreed at the final meeting that rental projections and a cashflow forecast at this stage would not be particularly meaningful.

STRATEGY FOR DEVELOPING THE SITE

So, we have proposed a strategy that recognises these limitations and gives MHPA a phased approach to maximising the potential of the site, and in doing so strengthening the waterside development of the northern section of the planned docks regeneration.

Our recommendation is to pursue a three-phase solution to the Quay Stores site as follows:

Phase 1

Secure the building and outfit to 'shell plus' and encourage meanwhile users, giving first refusal of this approach to the Torch Theatre;

Phase 2

Create the conditions for improving footfall by: creating shared surface at the front of the building with a traffic calming initiative and developing a straight-line link to (and over) the docks; developing the green link from the station to the docks; and developing the funicular; and in so doing make the site more viable, raising its attractiveness/value; and

Phase 3

Either the Meanwhile user will have grown into the space and a discussion can be had about a gradual 'ramping up' towards commercial rental in order to generate an adequate return on investment, or the site is put on the open market to seek a A3 type user (a Wetherspoons or similar) and perhaps accommodate Meanwhile uses elsewhere or, if sufficient income can be generated from a commercial let of the existing building, establish a lower cost pavilion or hall that can be cross subsidised from the main site to accommodate the displaced functions.

Additionally, we recommend that MHPA leads in developing a culturally focused place

promotion strategy that seeks to: provide the infrastructure for cultural events and activities locally in public spaces; create a user friendly regulatory process that makes it as simple as possible to establish interesting, creative events of all scales; establish a fund for supporting cultural activity that is linked to a clear set of outcomes in order to keep activity focused; and develop a place brand and marketing campaign in association with other cultural providers (some of whom are there now, whereas others will emerge as the process develops). In so doing it will further reinforce the potential of the Quay Stores site.

As with many sites, the answer to the Quay Stores sites' viability lies in its surroundings. The site is difficult at present, but: create the right conditions as outlined herein, and it has significant potential in the longer-term as the junction of a three-way connection between the docks, the train station and the town centre.

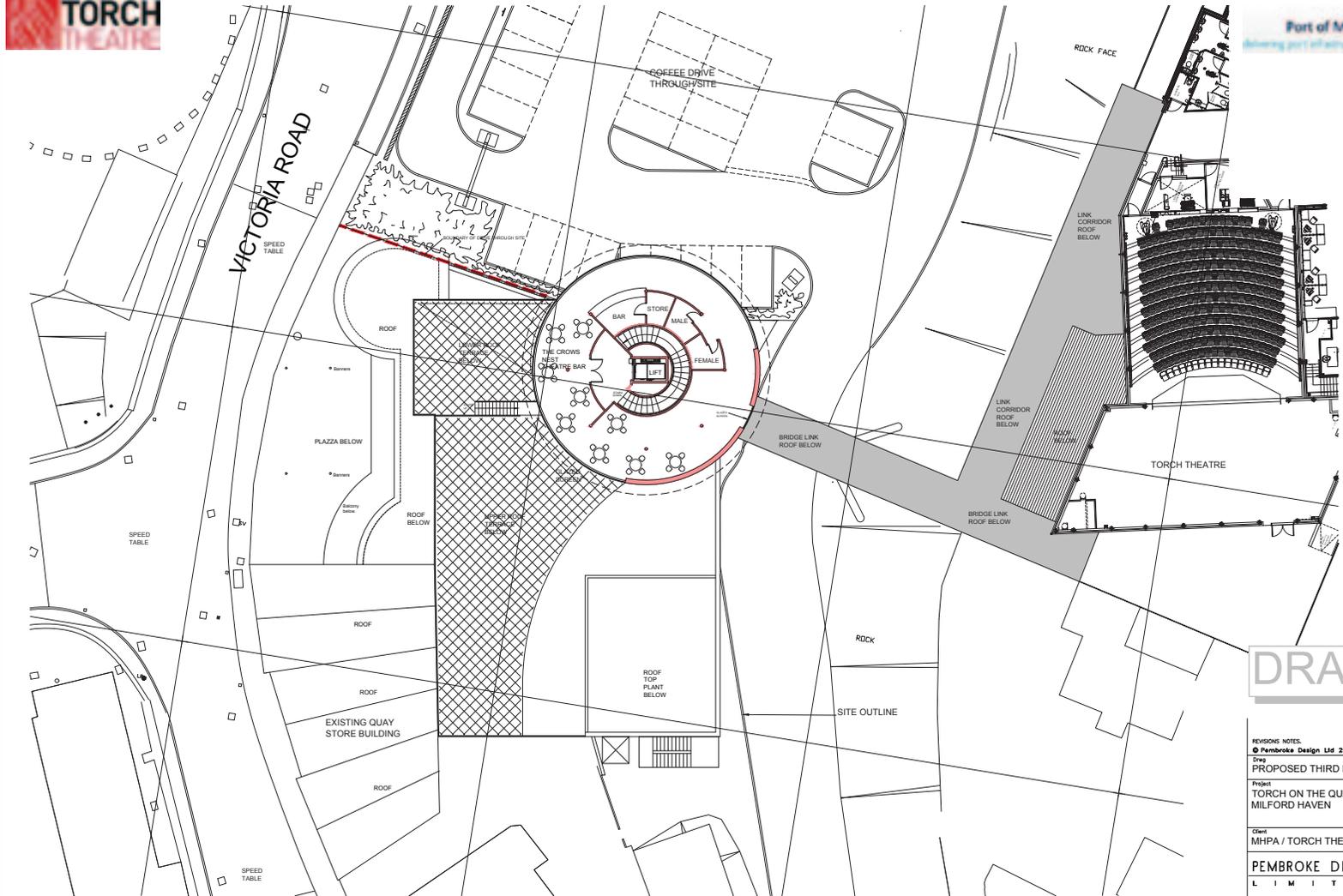
As a package, these elements above have the potential to create a unique environment with several aspects that are attractions in their own right. It is a long-term project, but build the local footfall and the wider regional perception of a vibrant cultural destination and it will create the conditions for a viable business there that can generate a return on investment over time, as well as providing additional community and cultural facilities for the town.

APPENDIX 1

Torch on the Quay

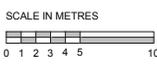
Original proposals

SEVEN



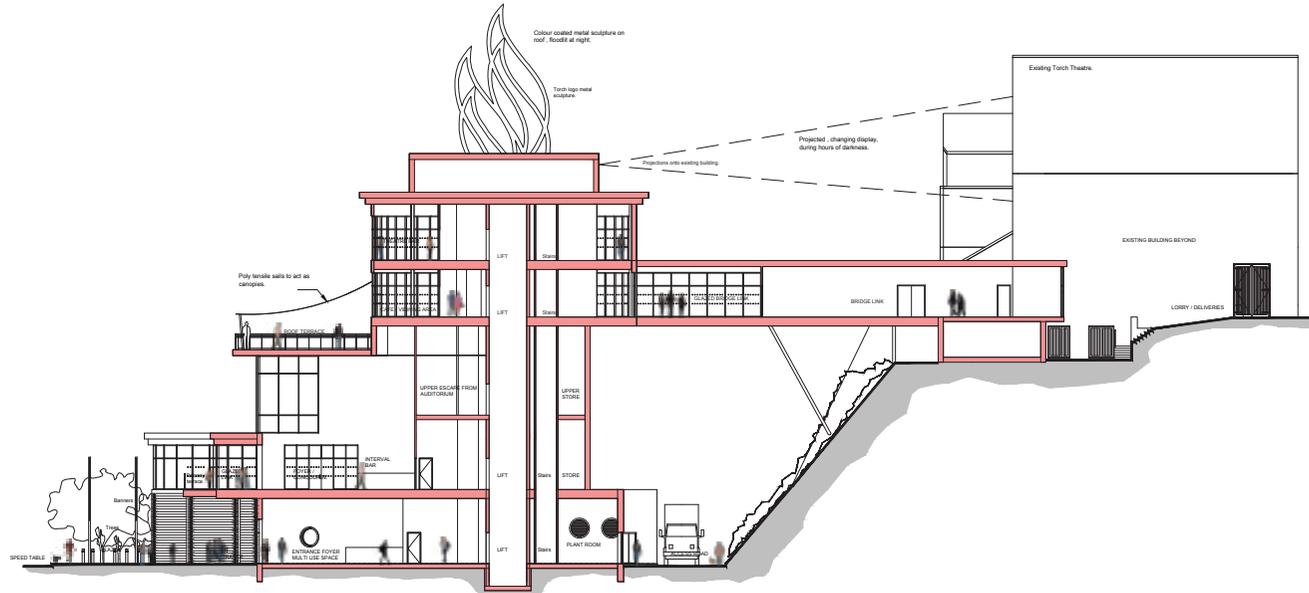
DRAFT

"TORCH ON THE QUAY" THIRD FLOOR PLAN



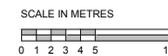
REVISIONS NOTES		DATE	REV
Drawn PROPOSED THIRD FLOOR			
Project TORCH ON THE QUAY, MILFORD HAVEN			
Client MHPA / TORCH THEATRE			
PEMBROKE DESIGN LIMITED			
PROJECT MANAGER GJS	ARCHITECT GJS	DRAWING CHECKER SCD	SURVEYOR SCD
DESIGNED GJS	SCALE 1:200	ORIGINAL SIZE A2	JOB NO. 8794
DRAWN SCD	DATE JUN 16	CHECKED BY SCD	DRAW NO. P04

SVOL LIVE JOBS FOR DTS SHARE/8794 - MHPA - QUAY STORES & TOWER/HAVEN/FORDWEST/VDL DRAWINGS/PROPOSED QUAY STORES PLANS 05.dwg



DRAFT

"TORCH ON THE QUAY" SECTION THROUGH BUILDING



REVISIONS NOTES:		DATE	REV
© Pembroke Design Ltd 2016			
Drawn: PROPOSED SECTION			
Project: TORCH ON THE QUAY, MILFORD HAVEN			
Client: MHPA / TORCH THEATRE			
PEMBROKE DESIGN LIMITED			
♦ PEMBROKE DESIGN LIMITED 100, 101, 102, 103, 104, 105, 106, 107, 108, 109, 110, 111, 112, 113, 114, 115, 116, 117, 118, 119, 120, 121, 122, 123, 124, 125, 126, 127, 128, 129, 130, 131, 132, 133, 134, 135, 136, 137, 138, 139, 140, 141, 142, 143, 144, 145, 146, 147, 148, 149, 150, 151, 152, 153, 154, 155, 156, 157, 158, 159, 160, 161, 162, 163, 164, 165, 166, 167, 168, 169, 170, 171, 172, 173, 174, 175, 176, 177, 178, 179, 180, 181, 182, 183, 184, 185, 186, 187, 188, 189, 190, 191, 192, 193, 194, 195, 196, 197, 198, 199, 200, 201, 202, 203, 204, 205, 206, 207, 208, 209, 210, 211, 212, 213, 214, 215, 216, 217, 218, 219, 220, 221, 222, 223, 224, 225, 226, 227, 228, 229, 230, 231, 232, 233, 234, 235, 236, 237, 238, 239, 240, 241, 242, 243, 244, 245, 246, 247, 248, 249, 250, 251, 252, 253, 254, 255, 256, 257, 258, 259, 260, 261, 262, 263, 264, 265, 266, 267, 268, 269, 270, 271, 272, 273, 274, 275, 276, 277, 278, 279, 280, 281, 282, 283, 284, 285, 286, 287, 288, 289, 290, 291, 292, 293, 294, 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APPENDIX 2

Consultees

EIGHT

In addition to **Neil Jenkins** and **Stella Hooper** of MHPA, we are grateful to the following consultees for their time in assisting us to conduct this study:

Mike Cavanagh, Head of Cultural Services for Pembrokeshire County Council

Peter Doran, Torch Theatre

Councillor **William Eliot**,
Lord Mayor of Milford Haven

Glyn Garland, Seafarers' Centre

Vanessa John, Pembrokeshire Association for Voluntary Services (PAVS)

Sharron Lusher, Principal of Pembrokeshire College

Sinead Henehan, Community Safety, Poverty and Regeneration Manager for Pembrokeshire County Council

Councillor **Matthew Rickard**

Anna Malloy, MHPA
(Hubberston & Hakin BCT)

Billa Schleicher, All Pets Vet Care

Councillor **Colin Sharp**

Councillor **Guy Woodham**

Note that several individuals fulfil several roles as Town Councillors.

APPENDIX 3

Drawn options for the site

NINE



OPTION 1: GF
MUSIC VENUE
 with car-park



KEY

- 1 Live Music venue
- 2 Side entrance/exit canopy
- 3 Service bay
- 4 Outdoor seating/smoking area
- 5 Car park (17 spaces)
- 6 Gateway
- 7 Green ravine: eco park / cycleway
- 8 Traffic calming paving with pedestrian crossings

Revisions	Date	Client	Milford Haven Port Authority	innovative Design & Architecture Ltd
		Project	Quay Stores Redevelopment	3 Castle Terrace Newport NP23 5DF
		Drawing	SITE LAYOUT OPTION 1 Ground Floor	Tel: 01792 847407 architect@idea-house88.co.uk
		Checked		www.idea-house88.co.uk
		Copyright	© D&A Ltd	
		Scale	1:200@A2	
		Drawn by	QYSE/C/O7	
		Date	3/17	

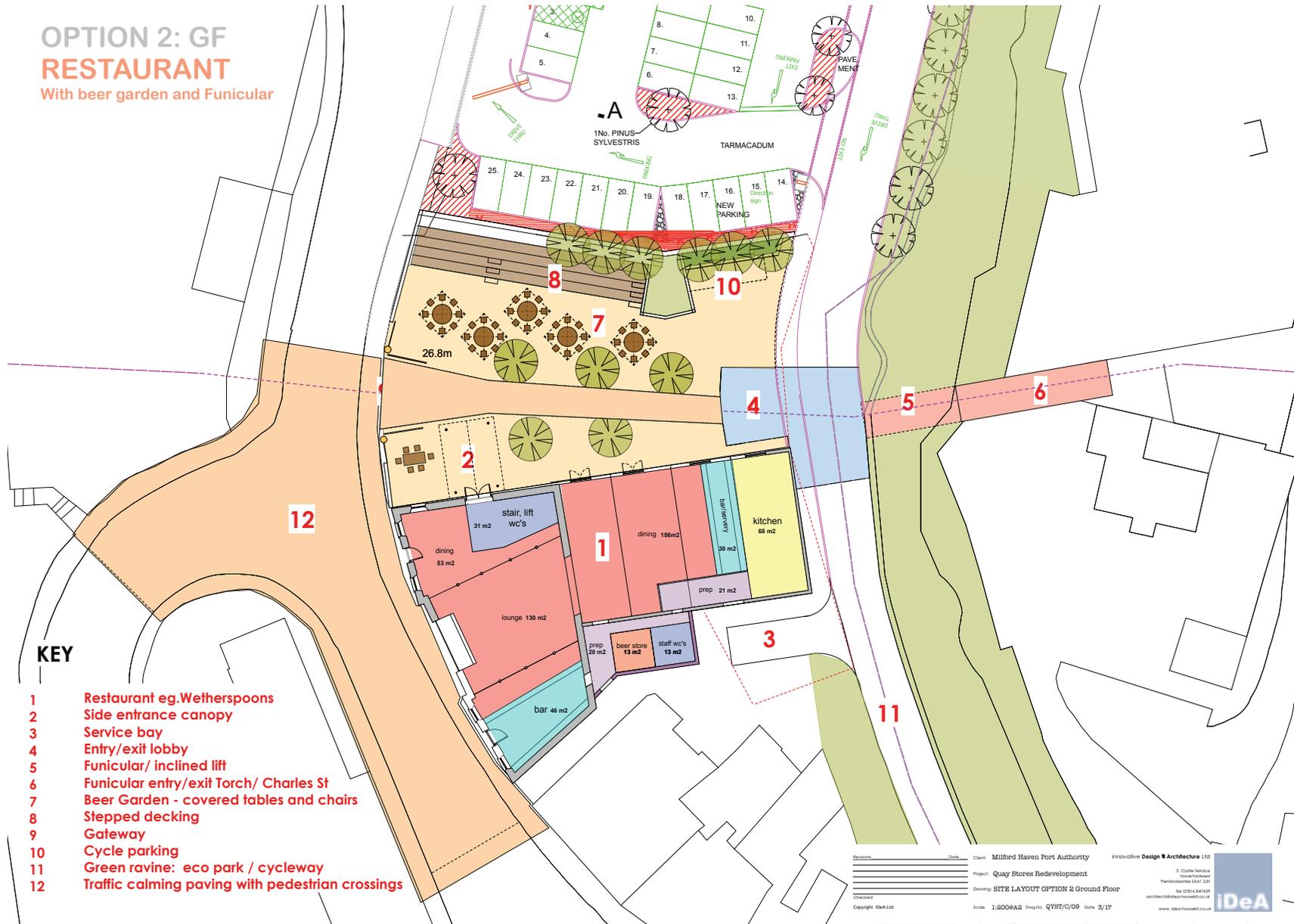


OPTION 1: FF
MUSIC VENUE
 with car-park

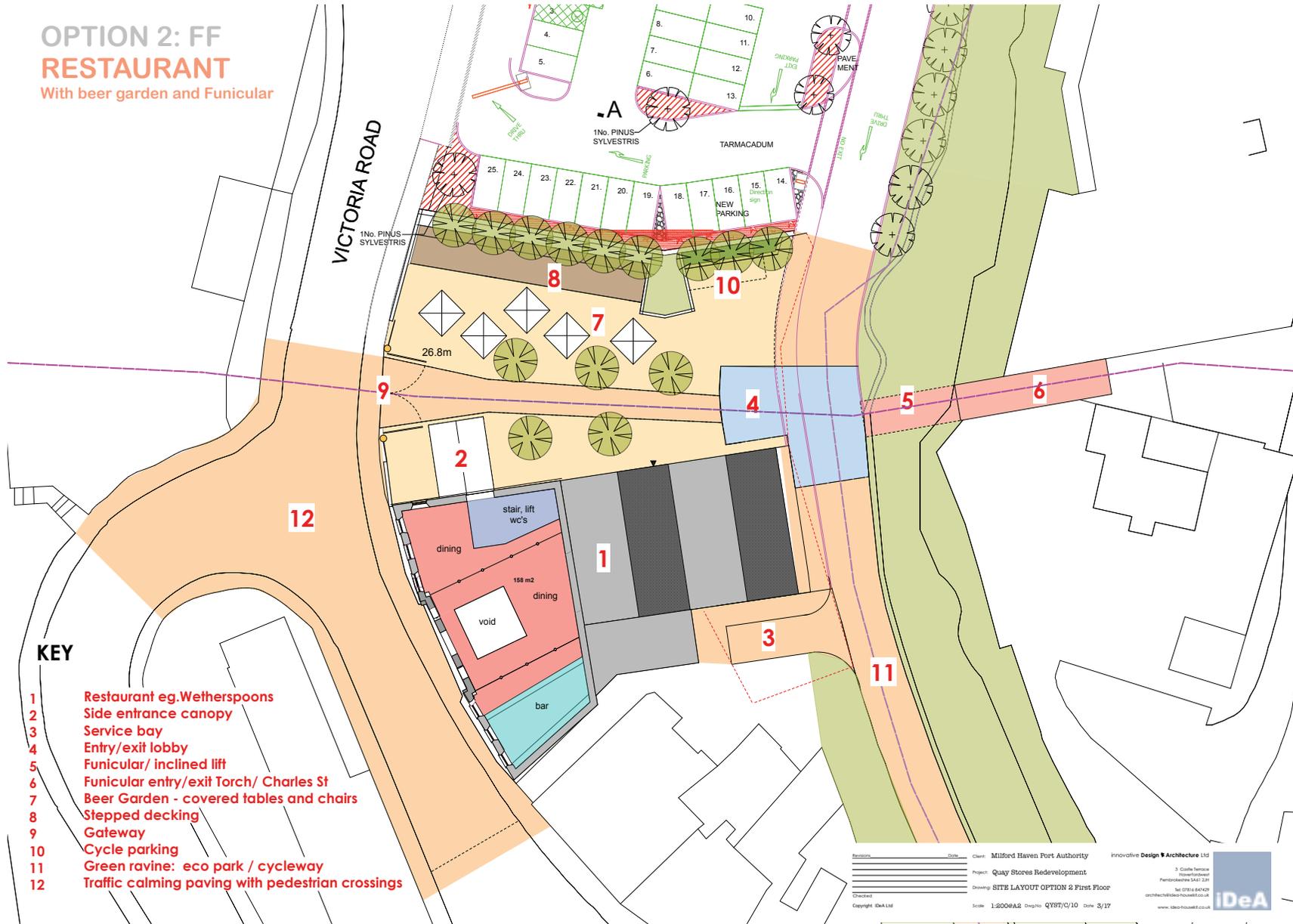


OPTION 2: GF RESTAURANT

With beer garden and Funicular



OPTION 2: FF RESTAURANT
With beer garden and Funicular



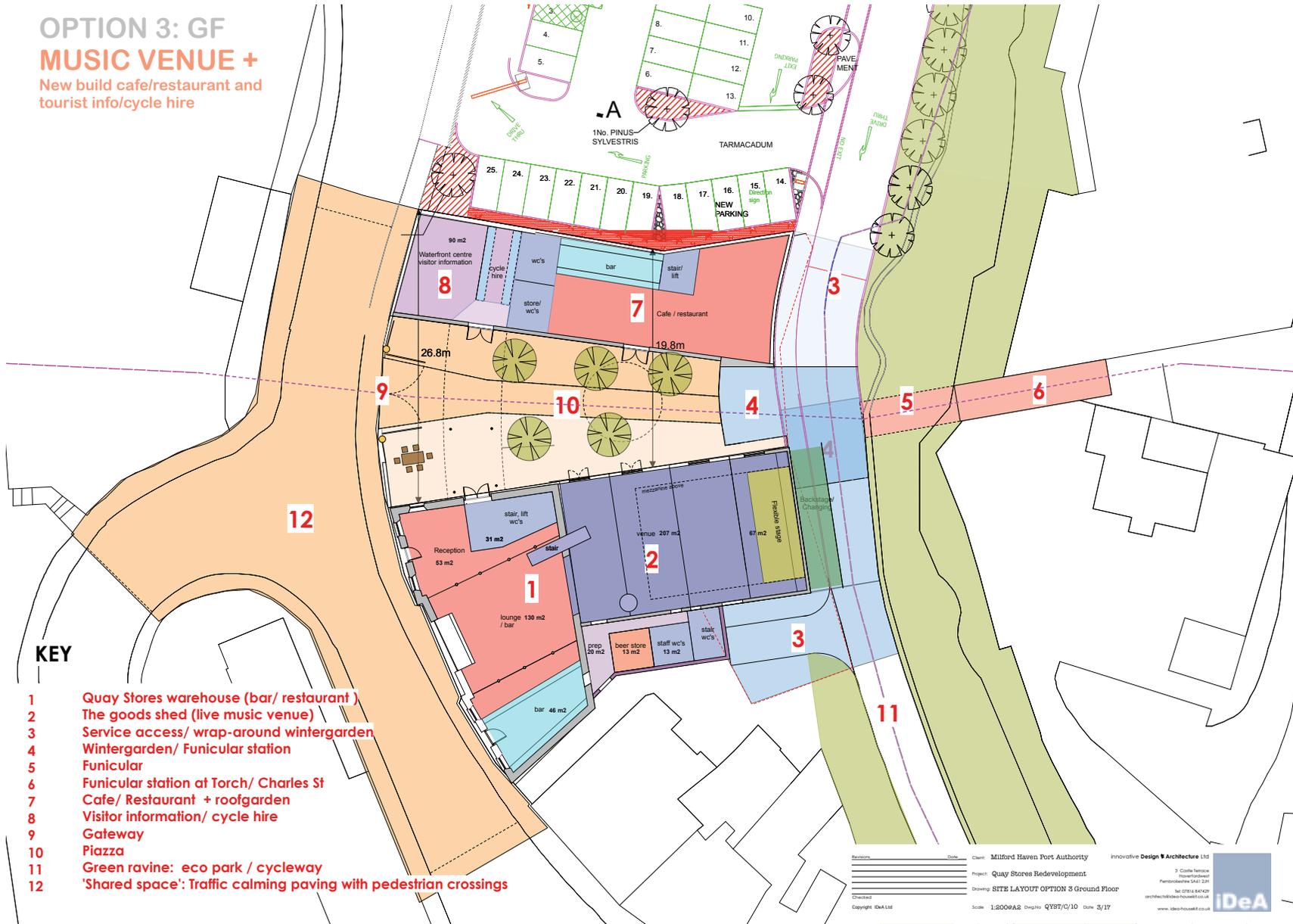
KEY

- 1 Restaurant eg. Wetherspoons
- 2 Side entrance canopy
- 3 Service bay
- 4 Entry/exit lobby
- 5 Funicular/ inclined lift
- 6 Funicular entry/exit Torch/ Charles St
- 7 Beer Garden - covered tables and chairs
- 8 Stepped decking
- 9 Gateway
- 10 Cycle parking
- 11 Green ravine: eco park / cycleway
- 12 Traffic calming paving with pedestrian crossings

Client: Milford Haven Port Authority
 Project: Quay Stores Redevelopment
 Drawing: SITE LAYOUT OPTION 2 First Floor
 Scale: 1:200@A2 Date: 3/17
 innovative Design Architecture Ltd
 3 Castle Terrace
 Portsmouth PO1 2JF
 Tel: 0753 84400
 arch@id-a.com
 www.id-a.com



OPTION 3: GF
MUSIC VENUE +
 New build cafe/restaurant and
 tourist info/cycle hire



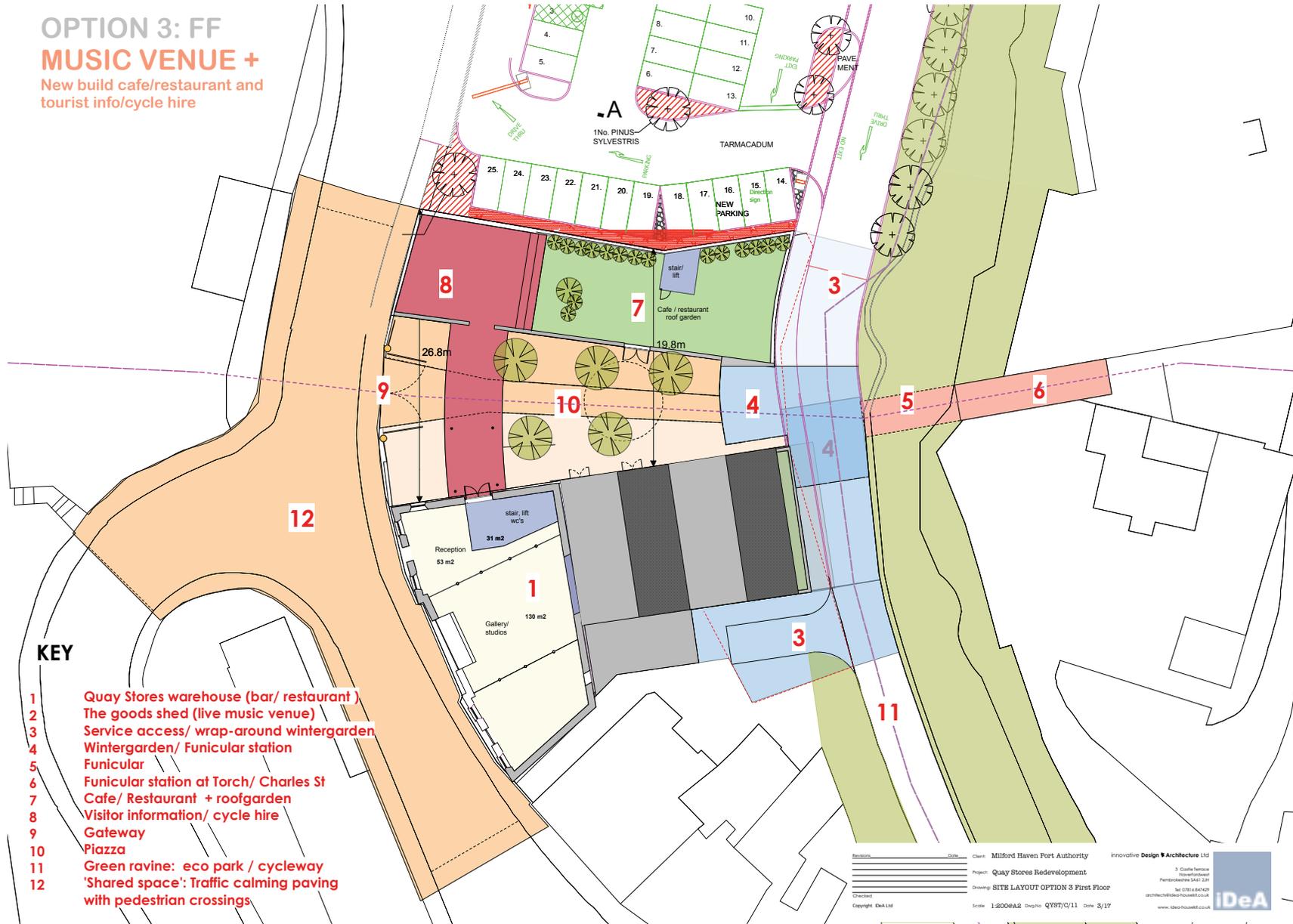
KEY

- 1 Quay Stores warehouse (bar/ restaurant)
- 2 The goods shed (live music venue)
- 3 Service access/ wrap-around wintergarden
- 4 Wintergarden/ Funicular station
- 5 Funicular
- 6 Funicular station at Torch/ Charles St
- 7 Cafe/ Restaurant + roofgarden
- 8 Visitor information/ cycle hire
- 9 Gateway
- 10 Piazza
- 11 Green ravine: eco park / cycleway
- 12 'Shared space': Traffic calming paving with pedestrian crossings

Client	Milford Haven Port Authority	innovative Design & Architecture Ltd
Project	Quay Stores Redevelopment	3 Castle Terrace Newport NP23 5DF
Drawing	SITE LAYOUT OPTION 3 Ground Floor	Perth & Kinross Tel: 01793 844000 architect@idea-house88.co.uk www.idea-house88.co.uk
Scale	1:200@A2	Drawn: QYSE/C/10 Date: 3/17



OPTION 3: FF
MUSIC VENUE +
 New build cafe/restaurant and
 tourist info/cycle hire



KEY

- 1 Quay Stores warehouse (bar/ restaurant)
- 2 The goods shed (live music venue)
- 3 Service access/ wrap-around wintergarden
- 4 Wintergarden/ Funicular station
- 5 Funicular
- 6 Funicular station at Torch/ Charles St
- 7 Cafe/ Restaurant + roofgarden
- 8 Visitor information/ cycle hire
- 9 Gateway
- 10 Piazza
- 11 Green ravine: eco park / cycleway
- 12 'Shared space': Traffic calming paving with pedestrian crossings

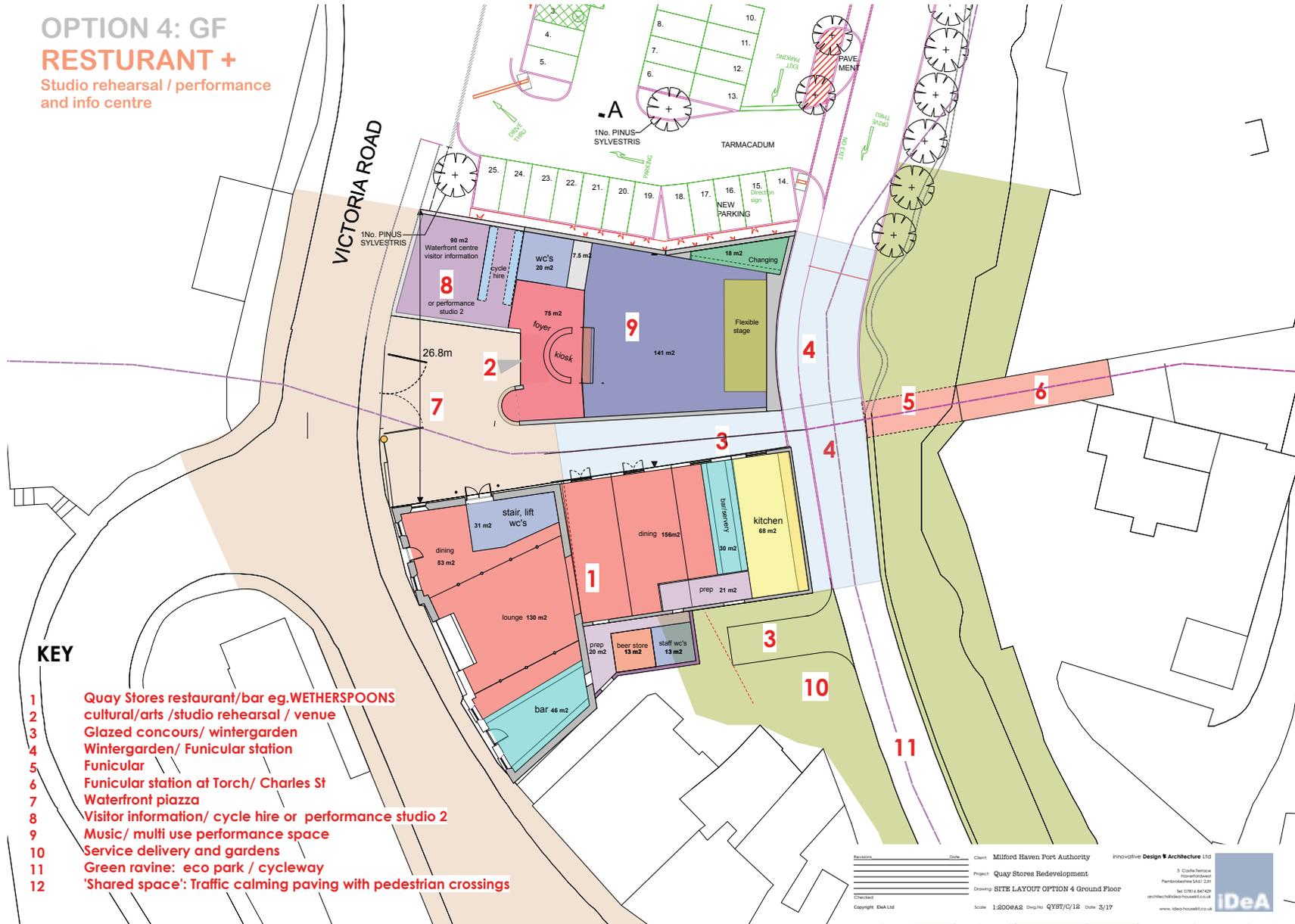
Revision: _____ Date: _____
 Client: Milford Haven Port Authority
 Project: Quay Stores Redevelopment
 Drawing: SITE LAYOUT OPTION 3 First Floor
 Checked: _____
 Copyright: IDeA Ltd
 Scale: 1:200@A2
 Date: 3/17

innovative Design & Architecture Ltd
 3 Castle Terrace
 Newmarket Road
 Peterborough PE1 2TE
 Tel: 01753 644000
 arch@ideahouse.co.uk
 www.ideahouse.co.uk



OPTION 4: GF RESTURANT +

Studio rehearsal / performance
and info centre



KEY

- 1 Quay Stores restaurant/bar eg. WETHERSPOONS
- 2 cultural/arts /studio rehearsal / venue
- 3 Glazed concours/ wintergarden
- 4 Wintergarden/ Funicular station
- 5 Funicular
- 6 Funicular station at Torch/ Charles St
- 7 Waterfront piazza
- 8 Visitor information/ cycle hire or performance studio 2
- 9 Music/ multi use performance space
- 10 Service delivery and gardens
- 11 Green ravine: eco park / cycleway
- 12 'Shared space': Traffic calming paving with pedestrian crossings

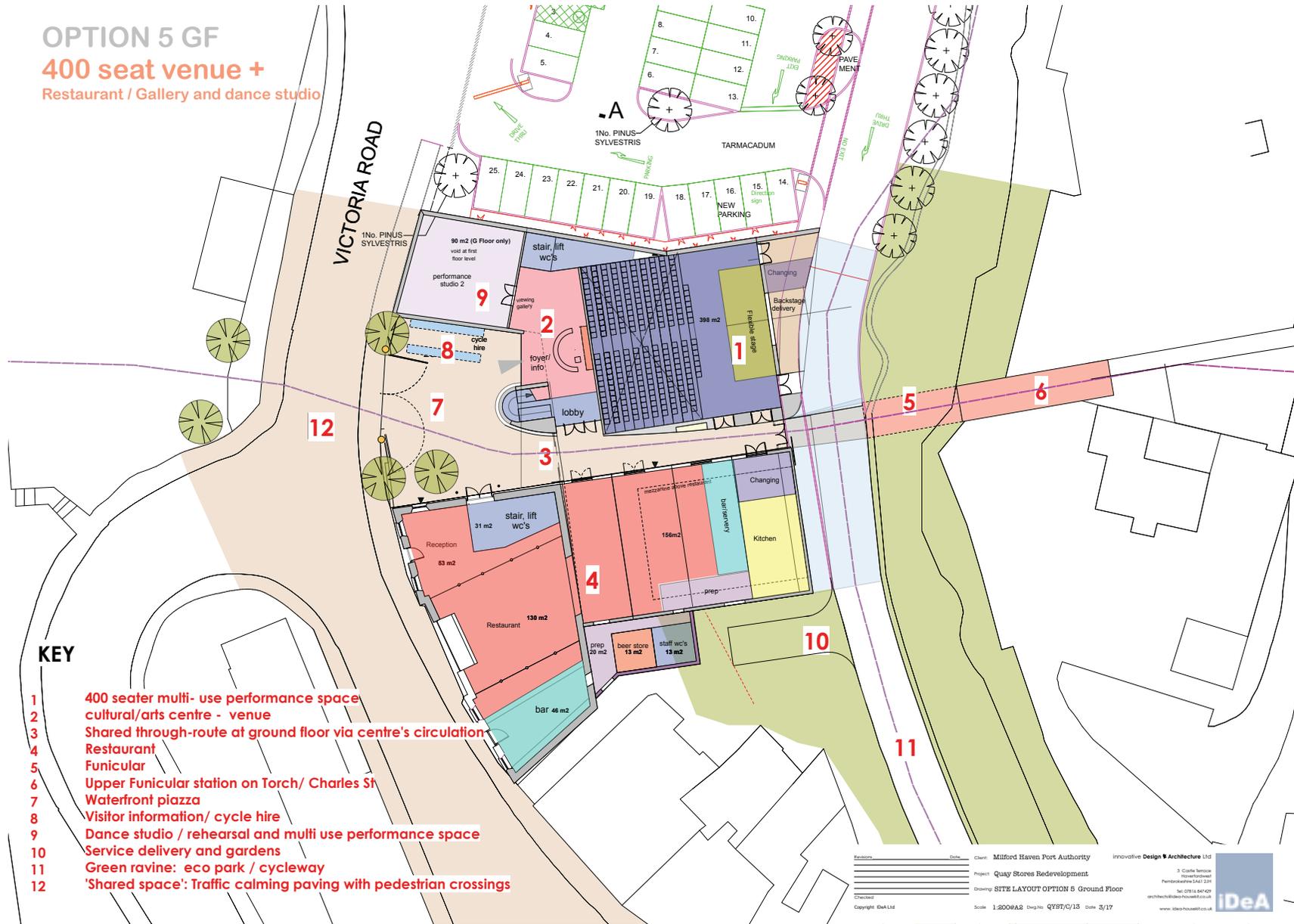
Revisions	Client	Milford Haven Port Authority	innovative Design & Architecture Ltd
_____	Project	Quay Stores Redevelopment	3 Castle Terrace Newport NP23 5DF
_____	Drawing	SITE LAYOUT OPTION 4 Ground Floor	01492 584500 architect@idea-house.co.uk
_____	Scale	1:200@A2	01492 584500 www.idea-house.co.uk
_____	Drawn by	QYSE/C/12	
_____	Date	3/17	



OPTION 5 GF

400 seat venue +

Restaurant / Gallery and dance studio



KEY

- 1 400 seater multi- use performance space cultural/arts centre - venue
- 2 Shared through-route at ground floor via centre's circulation
- 3 Funicular
- 4 Restaurant
- 5 Upper Funicular station on Torch/ Charles St
- 6 Waterfront piazza
- 7 Visitor information/ cycle hire
- 8 Dance studio / rehearsal and multi use performance space
- 9 Service delivery and gardens
- 10 Green ravine: eco park / cycleway
- 11 'Shared space': Traffic calming paving with pedestrian crossings
- 12

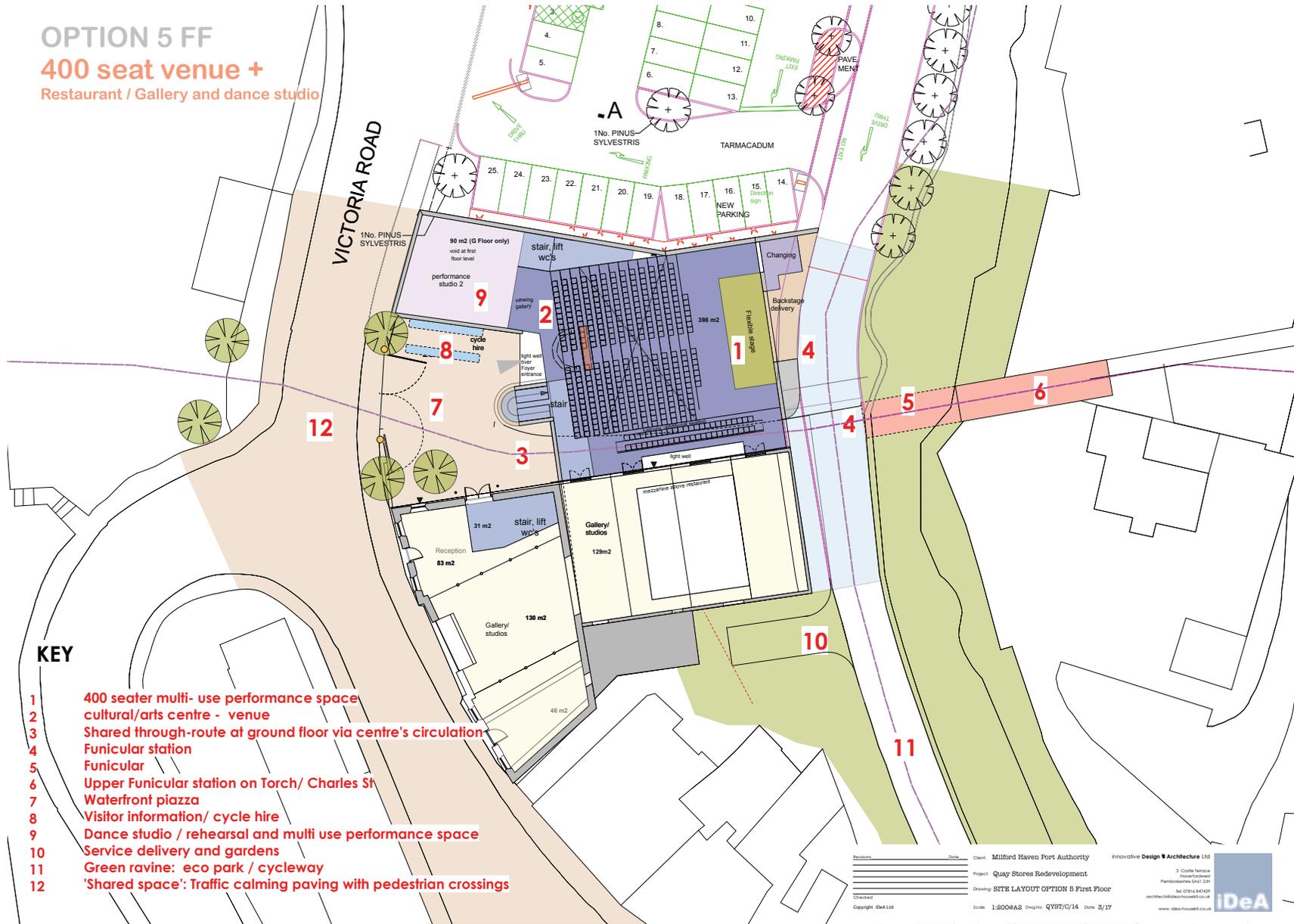
Revision: _____ Date: _____ Client: Milford Haven Port Authority innovative Design Architecture Ltd
 Project: Quay Stores Redevelopment 3 Castle Terrace
 Drawing: SITE LAYOUT OPTION 5 Ground Floor Penarth, South Wales
 Checked: _____ Date: 3/17
 Scale: 1:200@A2 Dwg No: Q987/C/13 Date: 3/17
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OPTION 5 FF

400 seat venue +

Restaurant / Gallery and dance studio



KEY

- 1 400 seater multi- use performance space
- 2 cultural/arts centre - venue
- 3 Shared through-route at ground floor via centre's circulation
- 4 Funicular station
- 5 Funicular
- 6 Upper Funicular station on Torch/ Charles St
- 7 Waterfront piazza
- 8 Visitor information/ cycle hire
- 9 Dance studio / rehearsal and multi use performance space
- 10 Service delivery and gardens
- 11 Green ravine: eco park / cycleway
- 12 'Shared space': Traffic calming paving with pedestrian crossings

Client: Milford Haven Port Authority
 Project: Quay Stores Redevelopment
 Drawing: SITE LAYOUT OPTION 5 First Floor
 Scale: 1:200@A2 Date: 3/17
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APPENDIX 4

Option capital cost estimates

TEN

QUAY STORES FEASIBILITY STUDY

QUAY STORES CONVERSION OPTIONS:
indicative construction cost estimates.

Summary

OPTION 1:	Music Venue with Car Park	£783.2K
OPTION 2:	Restaurant with Beer Garden	820.7K
	Option 2 Building/garden + funicular lower station	1,057.5K
OPTION 3:	Music Venue + New build Café/ restaurant, Tourist info and cycle hire Quay Stores building only	868.2K
	New and existing / re-modelled Quay stores	1,406.2K
Total Option 3:	All buildings + glazed Winter-garden	1,849.2K
OPTION 4:	Restaurant + Studio rehearsal / performance and Information Centre Quay Stores building only	1,117.5K
	New and existing/ re-modelled Quay stores buildings	1,797K
Total Option 4:	All buildings + glazed Winter-garden	2,283K
OPTION 5:	400 seat auditorium/ performance + Restaurant, Gallery and Dance studio. Quay Stores building only	1,348.5K
	New and existing/ re-modelled Quay stores buildings	2,546K
Total Option 5:	Buildings + glazed Winter-garden	2,850.5K
	Note the construction costs for the funicular are not included, and would be subject to further investigation and development.	

Areas (net) and indicative cost estimate breakdown

OPTION 1:	Music Venue with Car Park Quay stores – Warehouse and goods shed: ‘Shell +’ Renovate and repair the external envelope/ roofs/ Renew/ repair strengthen internal first floor structure Provide core internal layout with services. Re-clad the rear goods shed roof/walls. Provide basic finishes with further internal fit-out by others. Ground floor 580 m2 First floor 268 m2 848 x @£900 m2	£763.2K
	Car park/ external areas - add provisional 20K.	£783.2K
OPTION 2:	Restaurant with Beer Garden and Funicular Quay stores – Warehouse and goods shed: ‘Shell +’ Renovate and repair the external envelope/ roofs/ Renew/ repair strengthen internal first floor structure Provide core internal layout with services. Re-clad the rear goods shed roof/walls. Provide basic finishes with further internal fit-out by others. Add new service/ staff WC extension Area m2	Cost £
	Ground floor 580 x @ £900 m2	522K
	First floor 268 m2 x @ £900 m2	241.2K
	New extension 46m2 x @ £1,250m2	57.5K
	894.	820.7K
	External works/ garden: Add provisional cost65K

Total building/garden	£885.7K
Glass Funicular station shelter 115 x @1500m2	£172.5K
Total OPTION 2: Buildings + station shelter	£1057.5K

Funicular: Cost not included. TBC
The Funicular is envisaged as a separately costed project.

The report recommends that the funicular project is conceived and developed as a joint venture with partners in Milford Haven who have a vested interest. Milford Haven Town Council is cited as an example. The partners would finance the scheme by means of a long-term loan.

An alternative or 'as well as' financial option could be to crowd-fund / offer shares in the scheme allowing local businesses and individuals to invest in the town.

OPTION 3:	Music Venue + New build Café / restaurant, tourist info-cycle hire Quay stores – Warehouse and goods shed: 'Shell +' Renovate and repair the external envelope/ roofs/ Renew/ repair strengthen internal first floor structure Provide core internal layout with services. Re-clad the rear goods shed roof/walls. Provide basic finishes with further internal fit-out by others. Add new service/ staff WC extension Add new rear backstage / changing extension New-build + roof terrace/ garden
	Area m2 Cost £
	Ground floor 580 m2 +
	First floor 268 x @£900 m2 £763.2K
	Mezzanine gallery in restaurant (goods shed)

New side extension 46 x @£1,250 m2	57.5K
<u>New rear extension 38 x @£1,250 m2</u>	<u>£47.5K</u>
Total exg. Quay Stores building 932m2 x at rates above	£868.2K

OPTION 3:	Music Venue + New build Café / restaurant, tourist info-cycle hire (Cont) New-build Café/ tourist information centre + roof terrace/ garden Ground Floor 316 x @1,500m2 £475K Green Roof finish @35m2 Add provisional amount £13K <u>Roof terrace/ Canopy / hard landscaping</u> £50K Total new build 316m2 £538K Total New and existing / re-modelled Quay stores £1,406.2 Glass Winter-garden/ Funicular station 295 m2 x @1,500m2 £443K
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Total Option 3: All buildings + Winter-garden £1,849.2

OPTION 4:	Restaurant + Studio rehearsal / performance and Information Centre Quay stores – Warehouse and goods shed: full refurbishment Add new service/ staff WC extension New build - Restaurant + Studio rehearsal + with roof terrace/ garden
	Area m2 Cost £
	Quay Stores
	Ground floor 580 m2 +
	First floor 268 x @£1,250 m2 £1060K
	<u>New side extension 46 x @£1,250 m2</u> £57.5K
	Total Quay Stores building 932 x at rates above £1,117,500

Studio rehearsal/ performance space and information centre. <u>Ground floor studios/rehearsal and info centre 453 x @1,500 m2</u>	£679.5K
Total New and existing / re-modelled Quay stores buildings	£1,797K

<u>Arcade /Winter-garden/ Funicular station 324m2 x @1,500m2</u>	£486K
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Total Option 4: All buildings + Winter-garden £2,283,000

OPTION 5:	400 seat auditorium/ performance + Restaurant, Gallery and Dance studio.
	Quay stores – Warehouse and goods shed: full refurbishment
	Add new service/ staff WC extension
	Add FF mezzanine for Exhibition Gallery above restaurant
	 New-build cultural centre incorporating walk-through route and first floor auditoria.
	 Area m2 Cost £
	Quay Stores Ground floor 580 m2 +
	First floor 268 x @£1,250 m2£1060K
	Mezzanine gallery in restaurant (goods shed) 185 x @£1,250 m2 . . . £ 231K
	<u>New side extension 4 x @£1,250 m2£57.5 K</u>
	Total Quay Stores building 1079 x at rates above.£1,348,5K
	 New - build cultural centre
	Ground floor 487.5 m2 +
	First floor 170 x @£1,500 m2£986K
	Through passage/ Arcade and piazza 282 x @£750m2 £211.5K
	Total New and existing / re-modelled Quay stores buildings £2,546K
	<u>Winter-garden/ Funicular station 203m2 x @1,500m2. £304.5K</u>
Total Option 5	buildings + Winter-garden£2,850.5K

Note: These outline cost estimates are indicative only at this stage based on cost per m2 rates shown as follows:

The 'Shell +' Building envelope and basic internal / services with internal fit out by others	£900 per m2
 New build – additions/ extensions to Quay Stores	£1,250 per m2
 New build options / proposals	£1,500 per m2
 Piazza and passage exterior Public space	£750 per m2

Areas are taken from drawings. Some checking is required in areas on site to confirm plan layout. In particular to the rear of the Quay Stores building i.e.: the outline of the goods shed wall (South side) to be confirmed with site measure (discrepancy shows on two existing drawings).

The following are not included in these costs:

Alterations to road surfaces to create new shared surfaces areas for traffic/ people. The design and construction costs of the funicular. These are subject to further investigation and development.



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