

# Flagship Heritage Attraction, Haverfordwest Castle Research and Assessment Report Report 1



Prepared by  
Planning Solutions Consulting Limited and Davies Sutton Architects  
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Contact details	David Howells Planning Solutions Consulting Limited 9 Leigh Road Havant Hampshire PO9 2ES <a href="mailto:david@pslplan.co.uk">david@pslplan.co.uk</a>

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### **Appendix 1: Major Events in Pembrokeshire**

# 1. Introduction and Project Concept

## 1.1 Background

Over the past 6 months, Planning Solutions Consulting, in partnership with Davies Sutton Architects, has been working with Pembrokeshire County Council and the Flagship Heritage Attraction Partnership Group (FHAPG), to look at the feasibility of establishing a Flagship Heritage Attraction (FHA) for Pembrokeshire at Haverfordwest Castle.

The brief sets out the requirements for producing a feasibility study and delivery plan for a Flagship Heritage Attraction, to be located in Haverfordwest Castle. The feasibility study builds on the earlier Strategic Needs Analysis and Options Appraisal undertaken by Colliers International. The outcome of the study was a clear evidence base to satisfy the need for an attraction and a recommendation that Haverfordwest Castle would be the optimal location from the sites available. It was agreed that the focus of the new attraction would be on telling the story of Pembrokeshire's heritage together with a range of commercial opportunities to ensure financial viability.

Following presentation of an Interim Report to the FHAPG on 1<sup>st</sup> August 2018, a series of Technical Reports were produced to test and develop the concept and provide the evidence-base for structuring the development and Business Case for the new attraction. The papers were presented and discussed at the meeting of the Partnership Group on the 24<sup>th</sup> September 2018.

In parallel, a **Statement of Significance** of Haverfordwest Castle and the heritage assets of the county has been prepared (Report 2) to consider the heritage value and capacity to develop a new heritage attraction at the castle.

The **Research and Assessment** and **Statement of Significance** reports form the evidence base, drawing on our research, technical considerations and consultation for the proposals developed further in the **Development Plan** (Report 3) and **Delivery Plan** (Report 4).

## 1.2 Project Concept

In summary, the study is to assess and test the feasibility, viability and delivery of a new heritage-oriented attraction in Haverfordwest Castle with the aim of:

- Making Pembrokeshire heritage in its broadest sense more accessible
- Attracting more visitors to Haverfordwest
- Contributing to the regeneration of the town centre and securing a sustainable and appropriate future for Haverfordwest Castle

Unlike the earlier Colliers International study<sup>1</sup>, the feasibility study is looking at developing and utilising the whole castle site, including the Governor's House, Gaol Building, castle walls and Inner Bailey.

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<sup>1</sup> Flagship Heritage Attraction for Haverfordwest, January 2017

Pembrokeshire's tourism product is very much focused on its beaches and outstanding coastline and evidence suggests that heritage and wider cultural tourism is not high on the list of reasons for choosing the destination. This is despite the fact that Pembrokeshire has some amazing stories to tell and some impressive historic assets. However, there is no single focal point where visitors can start their journey and be inspired to explore Pembrokeshire's rich heritage.

The Flagship Heritage Attraction concept looks to address this by providing a new visitor attraction with a clear focus on heritage: past, present and future. The intention is to provide a 'taster' experience and to inspire visitors to explore the rich cultural heritage and stories of the county.

The Castle represents an important icon of the history and culture of Haverfordwest and its story provides rich insights into local history and heritage. However, the current visitor offer is poor and as a visitor, it is difficult to ignore the condition and fabric of the estate.

A further key driver is to better utilise the castle site to contribute to town centre regeneration, acting as a new magnet for local people and tourists, and thus boosting footfall and economic activity.

The feasibility study and development 'mix' needs to ensure that the new attraction and Castle is financially sustainable and viable, attracting more visitors and growing commercial income in a balanced way to generate a return and re-investment for the long-term care and management of the site. Clearly the 'mix' needs to be appropriate to the heritage, ensuring changes are sensitive to the historic environment.

### **1.3 Project Aims and Objectives**

The overall objective is to test the feasibility of developing a regionally-significant heritage tourism attraction:

- A recognised family experience
- A development mix that is viable and sustainable and appropriate to the heritage
- A unique attraction, which presents an exciting story of Pembrokeshire's heritage and culture from pre-historic to modern times
- A commercial venue for a broad range of heritage, cultural and other events and activities

The Review and Assessment Report sets out the analysis of the evidence base, which provides the framework for Development Plan proposal for the site (Report 3).

## 2. The Site

### 2.1 The Castle site

The castle stands on a naturally defensive ridge. It towers above the town centre with the openings of the former principal chambers facing north-east, and the blocked windows of the former Great Hall south-east, and the South Tower between. The roofless ruins of the shell of the castle are of local stone, close inspection of which reveals a variation in the masonry and moulding profiles all of which indicate the different periods of building and repair.

The principal surviving part is the inner ward at the east end, almost all of which is the result of major remodeling in the late 13<sup>th</sup> century. It is enclosed, to the east, by the principal chambers and chapel and, to the south, by the Great Hall and the south-east tower. To the north is the Keep and the Brechinock or North Tower. The curtain wall is partly preserved to the north behind the former Gaol and around the area that is now the car park.

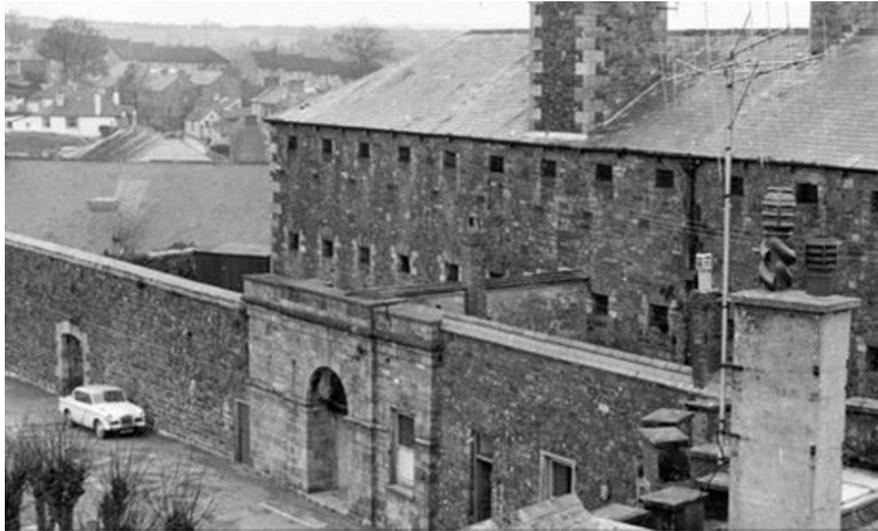
**Haverfordwest Castle, circa 13<sup>th</sup>**



In 1780 the County Gaol was built in the Outer Ward, contemporary with the Governor's House that closed the Inner Ward. The latter has a bowed central bay created from the base of a round tower of the medieval inner gatehouse.

The Gaol was replaced in 1820 by a much larger prison that operated until 1878. From then until 1963 it was occupied by the Pembrokeshire Constabulary, after which it was converted by the Council to house the County Archives.

## Haverfordwest Prison, circa 1960s



The Castle is designated both a scheduled ancient monument and a Grade I listed building. The Gaol and the Governor's House are both Grade II listed buildings. Additionally, the Castle is a key site within the Haverfordwest Conservation Area.

## Haverfordwest Castle and Surrounding Buildings



## 2.2 Haverfordwest Town Museum

The Haverfordwest Town Museum has been part of the castle site since 1996, initially

located within the adjacent former County Gaol before moving to the Governor's House. Its highly regarded status is recognised by the fact that it was the first organisation in Wales to receive a grant from the Heritage Lottery Fund.

#### **Haverfordwest Town Museum, Governors House**



The Museum tells the history of the town primarily through a diverse collection of oil paintings, drawings, photographs, postcards, documents, costume, militaria, musical instruments, pewter, silver, ceramics, furniture and archaeological artefacts including Roman pottery and finds from Haverfordwest Priory.

The significance of the Pembrokeshire Museum Service as a whole, with the exception of works of art by well-known artists, such as Augustus John, John Piper and Graham Sutherland, lies more in what it tells us about the local history of the area and its people. Haverfordwest Town Museum, Tenby Museum and Art Gallery, Milford Haven Heritage and Maritime Museum, Narberth Museum, Penrhos Cottage and Scolton Manor all have full accreditation as Registered Museums.

### **2.3 Statement of Significance**

The detailed Statement of Significance (Report 2) considers the heritage values and capacity of the Castle to be transformed into a flagship heritage attraction. As the castle site includes the Haverfordwest Town Museum the Statement of Significance includes its collections and its contribution to the castle. The brief has been expanded to review all the Pembrokeshire museums to assess their significance and potential contribution to a flagship attraction. In addition, consideration was given to the potential for loans from private collections and the National Museum Wales.

The report notes that the story of Pembrokeshire from the earliest known times to the present day is not told anywhere else in one place. The analysis of what that story might be shows it to be somewhat an undiscovered county today yet paradoxically a county that was regularly 'discovered' in past centuries. This offers potential to develop further these emerging ideas for a flagship heritage attraction at Haverfordwest Castle.

#### Summary of the proposition to be developed

From a heritage perspective the castle and its associated buildings are capable of being transformed into a flagship heritage attraction. Development of a new heritage attraction could provide a viable and appropriate solution for the castle and that, carefully and authentically presented, it could add value to the Pembrokeshire Museums as a whole. The new attraction could draw visitors to Haverfordwest and, in so doing, would contribute to the town's regeneration. It could also be a catalyst for increasing tourism around the county as a whole and therefore deliver a positive cultural and economic impact.

### 3. Strategic Context

This section considers the strategic case, particularly the current national, regional and local priorities relevant to the development of the Flagship Heritage Attraction.

#### 3.1 National Economic Strategy

Under the new Wales Economic Strategy, Welsh Government has committed to support the four 'foundation' sectors of the Wales economy – tourism, food, retail and care - acknowledging that for some parts of Wales the foundation sectors are the local economy.

The connections between the foundation sectors and quality of place have important economic impacts including the interrelationship between a strong retail offer and tourism.

There is a return to Regional Economic Development across Wales (through, for example, the City Deal process). This place-based approach to economic development will enable WG to respond more effectively to discrete challenges and opportunities faced by each of the regions.

The plan commits WG to promoting Wales through:

- Building on the unified brand for Wales as a place in which to invest, work, live, visit and study.
- Deploying tourism campaigns as the main flag carrier for the promotion of Wales in the UK and internationally.
- Deploying the cultural offer in support of the promotion of Wales' economic and commercial interests and building the country's image abroad.

#### 3.2 National Tourism Strategy

The context for tourism in Wales is set by the national strategy 'Partnership for Growth' (P4G) developed by Visit Wales in consultation with industry and destination stakeholders and implemented from 2013.

P4G set a growth target of 10% in real terms by 2020. By 2016 growth was moving well ahead of target and refocused Visit Wales' own investment priorities, including the following, in support of the 'This is Wales/ Gwlad Gwlad' brand,

- Flagship attractions: work with the private sector to ensure there is a strong pipeline of new high-quality attractions and activity products, particularly those providing distinctive and unique experiences that can attract new demand and all weather, year round visits.
- Development of Heritage and Cultural experiences: Work with key stakeholders to support investment in the visitor experience and accommodation provision at landmark heritage and cultural attractions
- Utilisation by business of emerging technology: Work with the industry to harness new technology to create exciting, transformative visitor experiences and improve industry competitiveness.

VW is leading on integrated route-based experiences, the 'Wales Way', to give confidence to those unfamiliar with Wales (especially from overseas markets) and spread the economic benefits of tourism. The first of these will be the A487 corridor 'West Coast Way' which will begin (or end...) in Pembrokeshire

Also, to add focus, VW has been leading a 'Years of...' approach to marketing, 'soft' product development and communications with Adventure in 2016, Legends in 2017, the Sea in 2018 and Discovery in 2019.

In implementing the 'This is Wales...' brand VW is applying 5 brand values as tests for project support:

- Surprise and Inspire
- Change Perceptions
- Elevate Our Status
- Do Good Things
- Be Unmistakably Wales

All of these investment priorities and destination strengths for Wales can be embraced in proposals for Haverfordwest Castle. It will be important for the proposed new visitor attraction to adhere to these core brand values, particularly if there is a future opportunity to source Visit Wales financial support to the project.

### **3.3 Swansea Bay City Deal**

The Swansea Bay City Deal is a £1.3bn investment secured by the Swansea Bay City Region for 11 major projects across Pembrokeshire, Carmarthenshire, Swansea and Neath Port Talbot. The City Deal includes funding from the UK and Welsh Governments, the public sector and the private sector. Among the projects is Pembroke Dock Marine, which will include the development of a testing area for wave and tidal energy devices. By creating a cluster of resources and expertise, the project will accelerate technology development in the marine energy sector and ensure continued investment and development in other test sites on a regional, Welsh and UK-wide scale.

There may be a case for lobbying to enhance the role of tourism and the visitor economy as a driver of economic growth as has been the case in Cardiff Capital City Region. The Growth and Competitiveness Commission's report on the Cardiff Capital Region City Deal identifies tourism as an existing strength in the region.<sup>2</sup> It specifically identifies opportunities in terms of developing heritage tourism to strengthen regional identity and provide an opportunity to create diversified tourism employment opportunities.

### **3.4 PCC's Corporate Priorities and Programme for Administration 2018-2022**

The County Council's Corporate Plan and Programme for Administration sets out local priorities for the County Council in response to ever decreasing funding, greater demand for

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<sup>2</sup> [http://www.cardiffcapitalregioncitydeal.wales/report/growth\\_&\\_comp\\_com\\_process\\_web.pdf](http://www.cardiffcapitalregioncitydeal.wales/report/growth_&_comp_com_process_web.pdf)

services and a population that is living longer. Economic development and regeneration are identified as corporate priorities and include actions to create a capital development fund to support economic development; work with partners to enhance and promote a high-quality leisure and tourism offer and maintain, protect or improve the natural and built environment.

Key regeneration priorities include:

- Haverfordwest Town Centre
- Henry Tudor development
- Pembroke Dock
- Milford Haven waterfront
- Food Park

Regenerating Pembrokeshire's town centres continue to be a key corporate priority, which has been a major driver for establishing the £20m capital fund to address key regeneration sites and issues in Pembrokeshire, with Haverfordwest highlighted as a key investment area. The County Council will use the fund for economic development and regeneration (catalyst / enabler for development).

The County Council has demonstrated support for the visitor economy and has confirmed that it is to commit more than £1 million to the redevelopment of the South Quay site in Pembroke. Subject to a final business case and agreement with local stakeholders, the Council will support the provision of a Henry Tudor Visitor Centre to further support the efforts by a range of stakeholders to reposition the town as a top tier visitor destination. In addition to the County Council's £1 million, further funding has been identified through the Welsh Government's Targeted Regeneration Investment Programme.

The Council's Strategic Asset Management Plan is designed to ensure that the County Council unlock the opportunities from assets, dispose of those that are not required, minimise running costs, and ensure that the assets that are kept are fit for purpose and used effectively in service delivery. A review of property assets is anticipated to identify sites and buildings as surplus to requirement. These will include non-operational properties, particularly sites that are identified as having development potential, plus operational service properties that, via the rationalisation programme, are no longer seen as required for service delivery. Property is identified as a key enabler to regeneration, both in town centres and within the wider context of the County, and strategic asset implications, which will vary from scheme to scheme, can be significant. The County Council will use, where appropriate, its Council property assets to enable town centre regeneration.

The FHA will need to demonstrate viability and a development that will draw people into the town and support increased footfall and regeneration outcomes. Owning, developing and managing a visitor attraction is not a core County Council responsibility. A clear and robust case will need to be made to demonstrate the value and opportunity of Haverfordwest Castle. If the Flagship Heritage Attraction is to access support from the County Council then any decision will be subject to value for money and an affordability test.

A further County Council priority is to implement new ways of working particularly to re-define the relationship and collaboration with external stakeholders so that all communities, whether in towns or rural areas, are sustainable, resourceful and vibrant. This could influence future management and governance arrangements for the Castle and new visitor attraction.

### **3.5 Pembrokeshire Destination Plan**

The Pembrokeshire Destination Management Plan<sup>3</sup> (DMP) is a business plan for building and managing the visitor economy for the county. The document captures and presents the information, learnings and priority actions to grow and develop the local visitor economy. One of 4 Strategic Objectives of the Plan is to strengthen the year-round appeal and accessibility of places to visit. Rather than the development of more, small attractions which will be competing with each other for a finite market, priority should be given to the provision of better all-weather facilities and strengthening the profile and appeal of existing attractions, especially encouraging longer out-of-season opening. Examples of how this can be achieved:

- Supporting requests for financial assistance for the improvement of existing attractions, which may also be linked to extended, out-of-season opening;
- Supporting attractions who wish to extend their opening through marketing activity.

Pembrokeshire's outstanding natural environment, coupled with strong elements of cultural and historic heritage, is its main strength as a tourist destination. This calls for great care and creativity in the way these precious resources are managed and made accessible to visitors. Many initiatives in this area will benefit local residents as well as visitors.

Pembrokeshire would benefit from more vibrant local destinations able to offer visitors a complete quality experience in terms of welcome, environment, heritage appeal, attractions, interpretation, events, accommodation, catering and infrastructure such as car-parking, signing and information. This can benefit residents as well as visitors.

There are various ways in which more can be made of the unique qualities of Pembrokeshire, thereby stimulating and adding to visitor interest and at the same time helping to sustain the local economy and local traditions and benefit local communities. Relevant action includes:

- Encourage town councils and chambers of trade to develop complementary brands and programs;
- Reflecting the local vernacular in the design of new tourism facilities;
- Continuing to develop the Arts and Crafts network;
- Encouraging more interpretation of local themes and cultural heritage through attractions, events, arts venues etc;

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<sup>3</sup> Pembrokeshire Destination Management Plan 2013-2018

### 3.6 Haverfordwest: A Vision for the future (Nathaniel Lichfield & Partners: August 2016)

'A Vision for the Future' sets out a development framework and priority projects to steer 'positive change' and regeneration in the town over the next 5-10 years. The Masterplan recognises the intrinsic architectural and townscape quality of Haverfordwest; yet the town is more often seen as a place to pass through rather than a destination in its own right.

The vision for the town is:

*To encourage a regionally distinctive, sustainable and vibrant town centre with a mix of independent and national retailers, strong cultural, arts and creative influences, a safe and secure environment for families, with an eclectic mix of events, a buoyant night-time economy and an improving aesthetic appearance.*

The Masterplan provides a strong rationale and justification for the Flagship Heritage Attraction. It concludes that the town's historic and architectural heritage is currently underplayed and should, with the appropriate level of marketing, encourage visitors to explore the wider town. Indeed, a key theme of the Masterplan is building on the town's unique heritage and built environment and the development of a new heritage attraction at Haverfordwest Castle is identified as one of four flagship projects.

A number of exciting new projects are being progressed in Haverfordwest, which collectively will make a significant contribution towards changing the fortunes of the town centre:

- transformation of the former Riverside indoor market into a new County Library, tourist information centre and Gallery;
- re-development of the Old Post Office into a new community venue and resource centre;
- Phase Two of the Haverfordwest Townscape Heritage Initiative (THI) is underway, restoring an area that was once the vibrant market place within the medieval core of the town. The Haverfordwest THI is a partnership project jointly funded by Pembrokeshire County Council, The Heritage Lottery Fund and Cadw.
- Investment in public realm improvements

Further major regeneration projects are in the pipeline, including the Ocky White site, which the Council has agreed to purchase, and for the Wilko site, which has planning consent for 15,100 sq ft of leisure space with four restaurants and shops at ground floor level and a five-screen cinema on the first floor.

The County Council's regeneration plan recognises that individually the priority projects proposed for Haverfordwest may not achieve the necessary impact to effect change. However, collectively the projects provide the foundation for a wholesale plan which will transform the fortunes of the town. A new visitor attraction at Haverfordwest Castle provides a really opportunity to transform the town centre and form an integral part of an enhanced leisure / destination offer.

## Summary

A strong Strategic Case can be made for the development of a new heritage-themed visitor attraction at Haverfordwest Castle.

The strategic aims outlined in the Welsh Government's tourism strategy *Partnership for Growth*, along with Visit Wales' priorities, provide a useful steer and framework within which to develop future options for Haverfordwest Castle. There are clear opportunities for developments at Haverfordwest Castle to support the delivery of strategic priorities at national, regional and local levels. This includes the potential to make a notable contribution to town centre regeneration, the promotion of civic pride and cultural heritage, supporting wellbeing goals, providing education and lifelong learning opportunities and enhancing quality of life.

The Flagship Heritage Attraction is a good strategic fit against the Destination Plan particularly in terms of improving an existing facility and, critically, in providing a much needed all-weather offer.

Haverfordwest town centre is a priority for regeneration investment. The Castle site is identified as a unique asset and re-development of the site would significantly contribute to the wider prospects and prosperity of the town. The County Council's recent commitment to acquire the Ocky White site in Haverfordwest demonstrates a clear ambition to facilitate and invest in change to revitalise the town centre. The rationale for acquisition identifies Ocky White as one component of a wholesale plan for Haverfordwest. The Castle contributes to a critical mass of regeneration opportunities that collectively has the potential to transform the town's future prospects.

However, the continuing pressure on the public purse means that a strong financial case is needed to secure County Council support regarding future sustainability and viability.

## 4. Market Position

In exploring the market potential and business case for the heritage visitor attraction, it is important to consider the local demographic profile (and reach) as well as the tourism market characteristics. This section also reviews the accommodation sector in further detail in light of the potential opportunity to convert the Governor's House into high quality self-catering accommodation and the events sector, whereby small-scale events could be accommodated within the Castle's walls.

The market characteristics have been used to underpin the assumption and rationale for the Financial Assessment.

### 4.1 Demographic profile

Pembrokeshire is predominantly a rural county with a relatively low density of population, which highlights the importance of the tourism marketplace. In addition, with coastal areas a proportion of the drivetime catchment radii fall in the sea which impacts on the size of the total available market.

We have reviewed demographic figures recently generated and provide a summary in the table below.

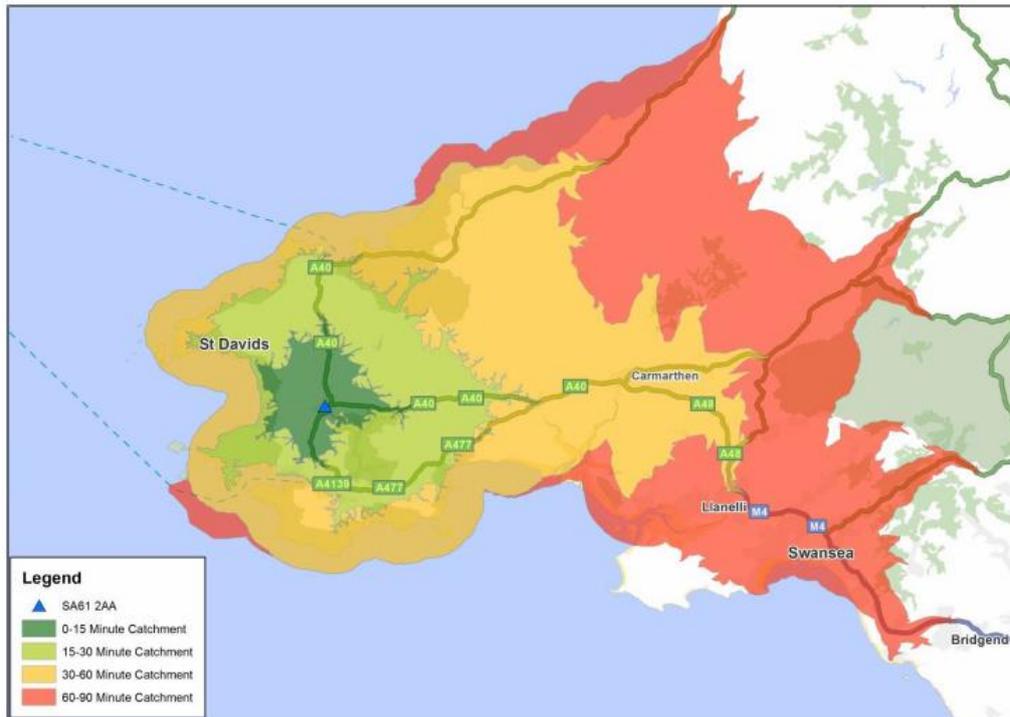
Table 1: Drivetime Profile

Drivetime contour	Households	Population
0 to 15	12,763	27,159
16 to 30	38,412	78,775
31 to 60	50,041	101,665
<b>Total</b>	<b>101,216</b>	<b>207,599</b>

Source : ONS Census 2011

The headline figures show a relatively small local market with just over 100,000 residents within 30 minutes and just over 200,000 within an hour. In comparison, the population within the 60 minute drivetime of Caerphilly Castle is 2.1 million residents.

The connectivity of the area shows relatively low average driving speeds which also affects the drivetime catchment populations. As an example, Swansea is shown as outside the 60 minute catchment. This has an impact on the potential day visitor market travelling from their home / place of residence.



Source: Henry VII Feasibility

The figure for the 90 minute drivetime contour rises to some 700,000 (for Pembroke the figure is 680,000). The demographic profile also shows a higher proportion of people with age groups over 55.

It is also relevant to consider the socio-economic profile of the area. This shows a lower proportion of people in the AB socio-economic categories. These are the more affluent markets with greater spending power and also represent the market groups most likely to visit heritage and cultural places of interest.

Table 2: Drivetime Profile: socio-economic categories

Social Grade	0 to 15 minutes			16 to 30 minutes			31 to 60		
	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100
AB: Higher/intermediate managerial /admin / professional	1,365	28.0	75	3,530	15.0	69	5,261	18.0	81
C1: Supervisory, clerical, jr managerial/admin/professional	2,282	32.1	90	5,864	26.0	83	8,296	28.0	92
C2: Skilled manual workers	2,213	19.2	129	6,571	29.0	137	8,132	28.0	132
DE: Semi-skilled and unskilled manual workers, on state benefit, unemployed, lowest grade workers	2,321	28.3	109	6,976	30.0	117	7,657	26.0	100

Source : ONS Census 2011

Conversely the proportion of persons in the C2 and DE groups is significantly higher than UK index (some 37% above for C2 groups within the 16 to 30 minute catchment).

## 4.2 Tourism market

Haverfordwest is the County town with a rich history; however, it is not a recognised tourist destination with a strong cachet. Haverfordwest tends to be merely a point of road and rail interchange with limited appeal to attract more people to spend time and stay in the town. It is recognised that there has been significant investment within the town, for example, the Riverside and other plans are in the pipeline.

Pembrokeshire as a whole has a substantial tourism economy and the aim is to attract a reasonable proportion of existing day visitors and tourists to see and enjoy the town and the Flagship Heritage Attraction has the potential to 'tap into' this market place.

In addition, the new facility at Haverfordwest could appeal to the special interest market, specifically those independent visitors on short break stays based on cultural heritage.

### *Domestic tourism*

In respect of the domestic tourism market, GBTS figures show South West Wales generates some 2 million trips in the three-year average from 2014-16, equivalent to nearly 8 million nights (7.907m) and a spend of £387 million in this period.

These figures have fluctuated over the previous 10 years peaking in 2011-13.

In terms of Pembrokeshire, domestic tourism generates some 1 million trips (1.031) in the 2014-16 period, representing approximately 4.85 million nights (4.848m), with a total spend of £247 million<sup>4</sup>.

This shows that Pembrokeshire is the second most visited county in Wales for staying guest nights (behind Gwynedd), equivalent to approximately 14% of Wales total. Again, these figures have fluctuated over the previous 10 years but there has been a general growth trend in terms of spend reaching peak levels in 2014-16.<sup>5</sup>

The average spend per trip in South West Wales in 2016 is £191 above the average for Wales of £181. This is partly due to the longer average length in stay and the dominance of the holiday tourism sector in the region.

### *Overseas*

In terms of overseas visitors, there is some contention in the figures within the STEAM data, however according to the recent IPS data, the region (South West Wales) generated 205,000 visits with a total spend of £90 million. For Pembrokeshire, the visitor figure is around 90,000 (89.5k) with spend at record levels of £23.8 million in 2014-16 (below only Cardiff, Swansea local authority areas and Gwynedd in Wales)<sup>6</sup>.

### *Day visits*

The day visitor market is significant in the region and county. For South West Wales there were some 21 million visits in 2014-16, below the levels for 2011-14. Spend is also below earlier levels at some £694 million<sup>7</sup>. The region clearly fares less well for day visitor market

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<sup>4</sup> Source:GBTS

<sup>5</sup> Source:GBTS

<sup>6</sup> Source: IPS

<sup>7</sup> Source: Great Britain Day Visitor Survey

compared to other regions (apart from Mid Wales) which largely reflects the available catchment markets to drive visitor levels.

Pembrokeshire receives some 5.42 million day visits with a spend of £171 million in 2014-16<sup>8</sup>.

### Groups

The Groups Market will be made up of three distinct market segments:

- Coach excursions
- Education groups
- Special interest groups

The coach market is reported to be in decline in Pembrokeshire in recent years, although many of the operators use Tenby as a base. Anecdotal evidence suggests that some coach operators stop-over in Haverfordwest mainly for the retail experience. The challenge is convincing operators to include a new heritage attraction within their package, particularly a new experience.

The cruise market represents a potential growth opportunity which heritage attractions can look to tap into either through individual packed mini tours or joint arrangements with other operations. In 2017 there were 31 cruise ship arrivals into Fishguard<sup>9</sup> with some 6700 persons on board with capacity ranging from 72 passengers to 1,266 per ship. Nearly half of these arrivals (45% were in July and August) and most stayed between 8 and 12 hours. Milford Haven Cruise Terminal had a further 9 arrivals in 2018 with between 400-800 passengers<sup>10</sup>.

The cruise market is forecast to grow and Pembrokeshire as a whole is likely to benefit from this growth trend. There is an opportunity to target this market with organised half day and full day excursions, most likely in cooperation with other heritage attractions to create a package. Experience Pembrokeshire could form the starting point of such organized trips but would require significant marketing activity to develop and sustain this 'business stream.'

As stated, St Dogmael's has had some success in attracting the cruise market and reports cruise companies are interested in offering passengers different itineraries for North Pembrokeshire of 4 or 8 hours. St Dogmael's believes there is potential to create different itineraries which could include a trip offering 4 or 5 castles which could feature Haverfordwest Castle site.

There are 70 schools and nearly 17,500 pupils in Pembrokeshire many of which explore heritage 'themes' during Key Stage 2 and 3. Schools are a potential lucrative market, with a new influx of pupils across the key stages every year. There is an opportunity for the 'taster' heritage offer at Haverfordwest Castle to provide the depth of education and curriculum-linked learning required.

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<sup>8</sup> Great Britain Day Visitor Survey

<sup>9</sup> Source Fishguard Bay Welcome ([www.fishguardbaywelcome.org.uk](http://www.fishguardbaywelcome.org.uk))

<sup>10</sup> Source Port of Milford Haven

### *Competitive landscape*

Attractions need to market themselves to both tourists and residents, particularly if operating all year or for a long season.

There is a strong competitive attraction market (some 60-80 attractions in the County) serving Pembrokeshire. Many of these are small-scale and operate on a seasonal opening basis.

Only the major attractions of Folly Farm and Oakwood Park generate more than 400,000 visits per annum and only three other sites (St Davids Cathedral, Oriell y parc and Pembroke Castle) above 100,000 visitors. It is clear that to reach this level (for attractions such as Pembroke Castle) has required a steady build up and investment / operations plan over a period of many years. Interestingly Folly Farm are investing in an accommodation product.

Most other attractions attract less than 50,000 or well below this figure annually.

The Destination Management Plan recognises that there is a fragile market for new attractions and their clear priority is to invest effort and funding in improving existing and enhancing the wet-weather resilience of these. There is an acknowledgement however that limited larger scale new attractions may be appropriate if they can be seen to provide a catalytic effect on the destination.

There is a lack of attractions with extensive all-weather facilities. It is interesting to note however that attractions such as Pembroke Castle generate higher levels of visitors when the weather is not really hot as less people go the beach / coast and are looking for interesting things to do elsewhere.

The County is especially rich in fine medieval castles and there is an opportunity to tap into the wider offer and become part of the offer for special interest markets.

One of the key features for successful attractions is the need to reinvest regularly in the product to maintain appeal to repeat visitors and this represents a significant investment hurdle for new attractions.

### Summary : Market Profile

Pembrokeshire is an established tourism destination with strong holiday market and day visitor levels. Haverfordwest lies in a strategic position on the road and rail network serving Pembrokeshire however it is not a leading tourist centre at present and lacks a strong cachet in the holiday market.

There is a very low population base within core 60 minute drivetime contour and Haverfordwest is remote from the main originator markets. The local demographic profile shows pockets of deprivation and a relatively elderly age profile.

There is a high degree of competition within the attractions sector in the County including established and popular heritage attractions.

### Tourism Profile

- People visit the area primarily for the outdoor environment (stunning coast and countryside). Heritage and history are relatively low motivators among current visitor base
- There is a high proportion of repeat visits among tourism trips. Some 68% of visitors are repeat arrivals. This does have implications for visitor attractions as there is a need to provide an offer which is capable of encouraging visitors to return rather than consider that they have seen all there is to see at the site.
- The distance to large market conurbations means that Pembrokeshire represents mainly a holiday rather than a short break destination
- The tourism industry in the County is highly seasonal - only 8% of holiday trips take place in 6 months (Oct-Mar). This has major implications for visitor attraction operations targeting the holiday market.
- The family market is acknowledged as an important priority target market for the County and Region and existing attractions appear keen to ensure they offer strong appeal to this market group

### 4.3 Accommodation

The Governor's House is currently used to house the town museum which in the overall plan will be re-located to the refurbished Gaol building. This presents an opportunity to refurbish the Governor's House as onsite high-quality self-catering accommodation.

As noted earlier Pembrokeshire is an established tourist destination with substantial accommodation base.

There is a large stock of self-catering accommodation dominated by holiday parks and static units along or near the coast and a number of cottages for hire.

In the serviced accommodation sector in Haverfordwest there is limited provision. The County Hotel and Hotel Mariners are the main operations alongside a Premier Inn and a few pubs which offer rooms.

Given the scale and character of the Governor's House it is too small for serviced accommodation without an extension and it is unlikely in our view to attract a buyer or investor to convert it to such use. The conversion and refurbishment costs will be considerable.

The property could be converted into a form of hostel / youth accommodation centre but such use would be more likely to select a location closer to the beach / coast with a wide range of activities available in the immediate adjacent areas. Again, it would be difficult for this to work without a sizeable extension to create additional rooms and supporting services.

Our research of the current self-catering provision identifies a range of properties and the level of the current stock in the County with just over 200 Visit Wales rated properties within 10 miles. Within four miles there are fifteen listed properties as shown in the table below.

Table 3: Visit Wales Graded self-catering accommodation (within 4 miles of site)

Name	Sleeps	Peak weekly price	Grading (*)	Distance (miles)	Type	Website
Hill Cottage	8	1820	5	0.7	House/Cottage	<a href="https://www.qualitycottages.co.uk/wales/west-wales/pembrokeshire/haverfordwest/hill-cottage">https://www.qualitycottages.co.uk/wales/west-wales/pembrokeshire/haverfordwest/hill-cottage</a>
The Barn	4	719	AG	0.9	House/Cottage	<a href="https://www.walescottageholidays.co.uk/pembrokeshire-west-wales/broad-haven-cottages/wav419-the-barn">https://www.walescottageholidays.co.uk/pembrokeshire-west-wales/broad-haven-cottages/wav419-the-barn</a>
Holly Cottage	3	531	4	0.9	House/Cottage	<a href="https://www.walescottageholidays.co.uk/pembrokeshire-west-wales/broad-haven-cottages/wav420-holly-cottage">https://www.walescottageholidays.co.uk/pembrokeshire-west-wales/broad-haven-cottages/wav420-holly-cottage</a>
Swallow Cottage	5	675	4	0.9	House/Cottage	<a href="https://www.walescottageholidays.co.uk/pembrokeshire-west-wales/broad-haven-cottages/wav585-swallow-cottage">https://www.walescottageholidays.co.uk/pembrokeshire-west-wales/broad-haven-cottages/wav585-swallow-cottage</a>
Lavender Cottage	3	531	4	0.9	House/Cottage	<a href="https://www.walescottageholidays.co.uk/pembrokeshire-west-wales/broad-haven-cottages/wav422-lavender-cottage">https://www.walescottageholidays.co.uk/pembrokeshire-west-wales/broad-haven-cottages/wav422-lavender-cottage</a>
Primrose Cottage	3	531	4	0.9	House/Cottage	<a href="https://www.walescottageholidays.co.uk/pembrokeshire-west-wales/broad-haven-cottages/wav422-lavender-cottage">https://www.walescottageholidays.co.uk/pembrokeshire-west-wales/broad-haven-cottages/wav422-lavender-cottage</a>
Rose Cottage	4	737	4	0.9	House/Cottage	<a href="https://www.walescottageholidays.co.uk/pembrokeshire-west-wales/broad-haven-cottages/wav586-rose-cottage">https://www.walescottageholidays.co.uk/pembrokeshire-west-wales/broad-haven-cottages/wav586-rose-cottage</a>
The Coach House	2	490	4	1	House/Cottage	<a href="http://www.shoalshook.com">http://www.shoalshook.com</a>
The Farmhouse	6	850	4	1	House/Cottage	<a href="http://www.shoalshook.com">http://www.shoalshook.com</a>
Fowborough Cottage	6	1100	5	3	House/Cottage	<a href="http://www.fowboroughcottage.co.uk">http://www.fowboroughcottage.co.uk</a>
The Cowshed	2	560	5	3	House/Cottage	<a href="http://www.fowboroughcottage.co.uk">http://www.fowboroughcottage.co.uk</a>
Clock Cottage	3	500	4	3.5	House/Cottage	<a href="http://www.visitwales.com/accommodation-search/accommodation-search-results/accommodation-search-http://www.cloverdalecottage.co.uk">http://www.visitwales.com/accommodation-search/accommodation-search-results/accommodation-search-http://www.cloverdalecottage.co.uk</a>
Clover Dale Cottage	4	495	4	3.6	House/Cottage	<a href="http://www.cloverdalecottage.co.uk">http://www.cloverdalecottage.co.uk</a>
Great Nash House	10	2010	5	3.7	House/Cottage	<a href="https://www.qualitycottages.co.uk/wales/west-wales/pembrokeshire/secret-waterway/great-nash-house">https://www.qualitycottages.co.uk/wales/west-wales/pembrokeshire/secret-waterway/great-nash-house</a>
The Old Coach House	8	2170	AG	3.8	House/Cottage	<a href="https://www.qualitycottages.co.uk/wales/west-wales/pembrokeshire/secret-waterway/the-old-coach-house">https://www.qualitycottages.co.uk/wales/west-wales/pembrokeshire/secret-waterway/the-old-coach-house</a>

Foxborough Cottage represents a reasonable comparison as a 3-bedroom property in an inland location. It is interesting to note that a number of castle attractions have introduced accommodation within their grounds, for example, Dover Castle and Warwick Castles to help generate additional income.

Of the 200+ properties within 10 miles, the majority are coastal, particularly those highly rated. The average price for a property sleeping 6 people, for a week at peak time = £1,090

### *Self catering occupancy in Wales and South West Region*

In 2017 the annual self-catering average unit occupancy for all cottages and apartments across Wales was 58% (see Table below), the highest rate in the previous nine years and an increase of four percentage points against 2016. Consistent with previous years, self-catering accommodation continued to demonstrate high levels of occupancy during peak periods. August recorded the highest levels of occupancy at 90%, with November (38%) being the lowest. (Wales). The 2017 annual and May-October occupancy rates are the highest they have been over the period analysed. South West Wales was on a par with the regional average at 58% (see table below) - only North Wales achieved a higher occupancy rate.

Table 4: Self catering cottages and apartments - Wales (ALL ) %

Average Unit Occupancy									
	2009	2010	2011	2012	2013	2014	2015	2016	2017
January	20	17	29	32	28	24	31	27	40
February	43	34	42	41	36	42	40	36	50
March	41	37	38	45	43	38	34	44	40
April	51	49	63	55	46	53	51	50	63
May	55	53	65	48	59	57	57	56	57
June	56	60	65	65	56	55	57	62	66
July	67	67	71	68	68	72	74	75	76
August	75	81	85	81	82	87	87	90	90
September	61	60	72	64	65	59	65	67	70
October	45	31	55	50	53	51	52	48	58
November	22	22	31	36	30	31	35	39	38
December	48	35	32	38	33	41	35	37	43
<b>May - October ave</b>	<b>60</b>	<b>59</b>	<b>69</b>	<b>63</b>	<b>64</b>	<b>63</b>	<b>63</b>	<b>66</b>	<b>70</b>
<b>Annual average</b>	<b>50</b>	<b>45</b>	<b>54</b>	<b>53</b>	<b>50</b>	<b>51</b>	<b>50</b>	<b>52</b>	<b>58</b>

Source: Visit Wales

In South West Wales, the average annual unit occupancy figure for 2017 showed an increase of eight percentage points when compared with 2016, while the 2017 May – October figure increased by six percentage points (please see table below).

Table 5: Self-catering South West Wales 2009-2017 – Independent (%)

Average Unit Occupancy									
	2009	2010	2011	2012	2013	2014	2015	2016	2017
January	20	16	17	22	23	21	35	25	36
February	40	25	34	28	32	30	47	34	46
March	36	32	34	29	28	32	34	34	33
April	56	50	61	50	47	48	46	44	66
May	53	52	59	40	48	61	42	51	62
June	67	64	58	60	48	57	58	57	71
July	73	70	66	61	62	68	74	66	71
August	86	87	87	77	76	88	88	80	87
September	65	65	67	58	58	54	68	71	68
October	44	45	41	39	40	46	49	48	50
November	17	20	21	25	22	30	28	33	30
December	29	24	24	23	29	37	28	34	29
<b>May - October ave</b>	<b>65</b>	<b>64</b>	<b>63</b>	<b>56</b>	<b>56</b>	<b>52</b>	<b>62</b>	<b>62</b>	<b>68</b>
<b>Annual average</b>	<b>49</b>	<b>46</b>	<b>48</b>	<b>46</b>	<b>44</b>	<b>48</b>	<b>49</b>	<b>46</b>	<b>54</b>

Source: Visit Wales

The annual average unit occupancy in coastal locations was higher than unit occupancy in inland locations. In 2017 occupancy rates in coastal locations were on average 5 percentage points higher than inland locations (62% compared to 57%).

The annual average unit occupancy rates by tariff for 2017 are presented in the table below:

Table 6: Self-catering (ALL) – Average Monthly Unit Occupancy by Tariff



Source: Visit Wales

Properties in the tariff band £500-£799 achieved the highest annual average unit occupancy rate (58%) – an increase of eight percentage points when compared with 2016. The lowest annual average unit occupancy rate (43%) was found in those charging up to £299 – but still 2% above the figure recorded in 2016.

The highest monthly occupancy rate (95%) was found in the most expensive tariff band in August but the lowest tariff band recorded the highest occupancy rates in June, July and, September.

In terms of occupancy by grading, within the Visit Wales grading scheme, properties with a 3-star grading recorded the highest annual average unit occupancy rate (60%) with 4 and 5-star properties achieving 55% and 57% respectively. The highest occupancy rates were found in August (93%) for 5-star properties, higher than all other star rated properties.

### Summary: Accommodation

We believe there is an opportunity to create a high quality self-catering unit subject to available capital funding.

The main opportunity lies in a high-quality conversion into a self-catering property for holiday rents, most likely a single 3-bedroom unit. There is competition but there is also a strong market in the provision of unique (even quirky), characteristic high-quality properties to rent for holiday use. This could also be used to host wedding groups as part of an inclusive wedding package.

It is recognised that there are a number of operational considerations e.g. how would it interface with a flagship attraction and there could be a conflict of use between the events space and accommodation elements and this will require careful planning to overcome. There will also be some potential synergies.

#### 4.4 Events

Our research has identified a wide range of events which are hosted within Haverfordwest and Pembrokeshire and attached in Appendix 1, a summary of main events currently or recently staged in the County. The larger events are capable of drawing visitors specifically for this purpose.

The events follow a number of lead themes including arts, music, food and drink, agricultural, sporting as well as health and wellbeing. There is also a specific events market around some holidays mainly Christmas time.

Events are often an important operational activity for attractions particularly in terms of helping to extend the season and in reaching out to special interest guests outside the core market groups

The importance of events is recognised at national, as well as at regional level: *“Events constitute one of the most exciting and fastest growing forms of leisure, business and tourism-related phenomena.”* UK Centre for Events Management, Leeds Metropolitan University.

Events are varied covering a wide range of activities and can be classified into a number of categories (please see shaded box below).

**International / National Mega Event:** An event of international / national significance which attracts international / domestic visitors and international / national media coverage.

- Hallmark events which support economic development
- National/international profile
- Often unique, yet with mainstream appeal
- Capable of generating high levels of visitor numbers
- Will generate significant economic impact

**Major Event:** An event which attracts significant visitor numbers and media interest to Pembrokeshire.

- Economic impact driven events
- Mass-participation attracting a large number of a given specific target market
- Can represent a high return on investment
- Planning and development is often lengthy (18 months to 8 years)

**Regional Event:** An event of regional significance which attracts regional visitors and regional media coverage.

- Help position location as tourism destination
- May achieve national/local media exposure
- Enhance local community pride

- Attract large specific-interest groups
- Tap into niche markets and generate economic benefits

**Local Event:** An event which is of significance to the local community and attracts local interest and visitors who are already in the destination.

- Primarily created for the local community
- Limited appeal to visitors
- Tend to be lower visitor numbers and economic impact
- Other benefits in terms of developing community co-operation and pride
- Can strengthen local tourism network

Locally, events can be attractive to host communities because they help to develop local pride and identity. In addition, they play an important role for the regions in terms of destination planning and development. Events can also make a valuable economic contribution to a locality, attract visitors (including outside main season) and inspire repeat visits. Although there can be issues, for example, local road congestion.

### Summary: Events

The available space within the Castle Walls represents a characteristic and atmospheric space which is partially sheltered from windy conditions and lends itself well to certain events. Access and capacity are key issues in considering the use of space for events.

Haverfordwest and the Castle site have already successfully hosted events in the past although currently there is a limited program staged in the area. Events such as the Haverfordwest Beer and Cider Festival have been staged for many years at the Castle and gained a reasonable profile and generated good footfall.

An increasing number of destinations are staging events and festivals as part of, or an enhancement to, their tourism product. The features of the Castle lend itself to certain performance and small festival style events. The creation of a form of events amphitheatre will provide a venue to host a series of activities and events within the walls, with seating, lighting and environmental improvements. A dedicated events space can be used for performances, entertainment as well as for a base for other leisure events.

At Haverfordwest Castle site it is most likely to be geared towards regional and local events. There would be a need to consider programming and the type of events which can be accommodated within the space.

It will be important to identify if the events space can be covered. Our sister company manages CONKERS. As part of the offer we have a 600+ seat amphitheatre which originally was not covered and this impacted on usage. The addition of a tensile structure has had a positive impact as it can now be used whatever the weather. Chepstow Castle has added a tensile cover over part of its courtyard for events use.

In terms of the events space it will be important to identify what scale of events can be accommodated within the available space. There is likely to be a need for public investment in the basic infrastructure and facilities which allow event organisers to then hire and use the space for permitted events, subject to obtaining the necessary licences.

The Town Council has recently negotiated an events licence with PCC to operate events at the Castle. Further discussions are needed to consider how this arrangement would be taken forward if the comprehensive redevelopment plan is taken forward. There is still likely to be a need to work with third party specialist organisations. Cadw runs a range of events with event partners in a number of properties although it is important to ensure there is a minimum level of disruption to the day to day operation of the attractions.

## 5. Public and Stakeholder Consultation

Decisions on the future development of the flagship heritage attraction at Haverfordwest Castle must reflect the needs and aspirations of stakeholders, partners and local people. This section summarises the outcome of stakeholder and public consultation.

### 5.1 Approach

Our work has been informed by discussions with local people, visitors, heritage attractions, stakeholders and partners, as well as two sessions with the FHA Partnership Group. Core consultation activities included:

- Meetings with members of the FHA Partnership Group;
- Discussions with tourism businesses, including an online survey of businesses who are members of Pembrokeshire Tourism;
- Attendance at the Pembrokeshire County Show, which included publicising an online survey for self-completion;
- On-line survey of all members of the Heritage Network, co-ordinated by Planed;
- Discussions with Members and officers at Pembrokeshire County Council;
- Meetings with key project partners including Haverfordwest Town Council and Planed;

In addition, preparation of the Statement of Significance (Report 2) included meetings with Pembrokeshire museums as well as meetings with the National Museum.

Based on the consultation completed to date, there is a notable level of commitment to the success of the Castle and the FHA concept and we perceive significant momentum in taking forward initiatives to make a positive contribution to its future development as an important regional attraction.

The ambition to provide a ‘taster’ experience and to inspire visitors to explore the rich cultural heritage and stories of the county is supported as long as it complements and contributes to existing facilities and services.

The Castle represents an important icon of the history and culture of Haverfordwest and its story provides rich insights into local history and heritage. However, the current facility is under-utilised with a poor visitor offer.

Pembrokeshire County Council and stakeholders are particularly keen to use the development as a further driver to regenerate the town centre, acting as a new magnet for local people and tourists, and thus boosting footfall and economic activity.

A summary of the key themes and issues raised in the consultations are set out below.

### 5.2 Issues and themes: Heritage Network

The survey among members of the Community Heritage Network yielded some 22

responses including museums, heritage attractions and representative organisations including the National Park, Civic Society and History Society.

The lead motivations for visiting Pembrokeshire are the Coastal National Park, the beaches and scenery which are all seen as important by more than 70% of all respondents. This is in line with other tourism surveys previously conducted by PCC and others.

Heritage and history is acknowledged as an important component of the visitor offer with just under 3 in 5 respondents recognising it as an important motivator for trips to the County.

The current tourism heritage product is considered as reasonable although less than one in four (22.7%) believe it to be very good.

More than 75% of respondents support the principle of improving the tourism heritage product and for directing associated investment into enhancing the quality of existing heritage attractions. Significant support was also given to the need for investment in marketing and communication with visitors. Less than half of respondents support investment into new attractions (42.9%).

There is a narrow majority of support for a dedicated Flagship Heritage Attraction in Haverfordwest (55%). Those in support believe there is a need for the County town to be a strong part of the tourism offer and such an attraction will help to achieve this and draw people away from the coast. Those against point to the fact that Haverfordwest is not currently a major tourist destination, that south Pembrokeshire attractions need boosting and that Haverfordwest has poor access and is not the right location.

In terms of the component elements of the attraction, the interpretation of Pembrokeshire's rich heritage is the first priority requirement. The need for appropriate information services also gains strong support.

A cafe and flexible meeting / learning space is seen as crucial by two thirds of respondents.

The main themes to merit highlighting within a heritage attraction are medieval Pembrokeshire, maritime and military heritage, with less support for more contemporary themes. The way the themes are presented generated support for multi-media, live interpretation and activities.

The three main priority target markets from the research are:

- Domestic overnight staying visitors
- Special interest and heritage groups
- Education groups

It is also seen as important to engage with overseas visitors, the family market and members of the local community. The latter is seen as critical for long term sustainability of

the attraction.

### **5.3 Issues and themes: Local Community and Visitors**

We also carried out a visitor survey, mostly with respondents based or living within the County. More than 40% had visited the Castle site within the past three years although other heritage attractions had much higher visit rates – St David’s Cathedral, Picton Castle, Carew Casle and Castell Henllys had all been visited by more than three-quarters of respondents. The over-riding notion is that the quality of heritage tourism in the County is fairly good but less than 5% view the offer as very good. Less than one in six consider the heritage offer to be fairly poor or poor.

In terms of the FHA, the priority space use should be for historical interpretation of the Castle and Gaol with strong backing for space to display exhibits about Pembrokeshire’s heritage and history. These improvements would encourage a higher level of visits among respondents.

The key themes are similar to the Community Heritage Network responses with Maritime Heritage and Medieval Pembrokeshire gaining most support. Agriculture and Industry is also seen as an important heritage theme for the County which should be interpreted by the FHA.

Interactive displays and activities gained the strongest support with guided tours also seen as an important part of the future offer.

### **5.4 Issues and themes: Tourism businesses**

We have held one to one discussions with the leading heritage attractions in the sub-region.

It is important to state that those contacted are interested in the mutual benefits that the proposed FHA can bring rather than expressing any significant concern over new entrants to the competitive marketplace. A number see the benefit of having a stronger critical mass of heritage sites and creating different packaged offers for visitors.

The level of activity is highly seasonal, stretching to between 10 and 12 peak weeks. Some report a ‘huge spike’ in the Summer holiday period. The remainder of the year for those that remain open to visitors, the local residential marketplace is of paramount importance. This market is also seen as important in terms of VFR (visiting friends and relatives).

A number of the existing operations contacted have a strong historic heritage either with a key figure in history or with significant historic events. This is seen as critical in terms of developing visitor interest and driving visitors to the respective sites.

Heritage attractions report that the charging policy is price sensitive and a number have been reluctant to push core admissions tariffs too high. This does mean however that there is only limited potential for discounting. One of the leading attractions now includes a guided tour within the headline admission price.

The attractions contacted also report how it is important to stage a range of innovative and

interesting events as part of the overall business activity. This can range for displays (falconry etc), kids activities (eg Knight School!) through to major concert, cinema showings and other performances. A number of the events such as 'Turkey and Tinsel' or Christmas Markets allow the operations to maintain trading through the quieter months.

The potential to include activities which are more wet weather resilient is seen as an important factor.

In addition to the general holiday market, the coach market, walkers' market and cruise market are acknowledged as offering growth potential for the heritage sector in the County.

The potential role of Haverfordwest FHA in acting as an information and promotional hub for other heritage sites in the county gained strong support.

The current view is that staycations have helped to grow the throughput in recent years and that it does take a long period to build a reputation and a core audience.

## **5.5 Issues and themes: Stakeholders**

A number of common themes have emerged from discussions with stakeholders, which are summarised below.

### **Unfulfilled heritage attraction**

There is overwhelming agreement that the Castle is not reaching its potential and the FHA concept provide an opportunity to better market and promote the heritage assets of the county. Delivery of the concept will need to secure buy-in from other heritage groups and facilities within the county.

In particular, there is agreement that the FHA needs to define its visitor proposition, specifically:

- the heritage experience;
- the Castle's USP; and
- What's the Story, i.e. the compelling interpretive themes that will flow through the site.

Stakeholders support the comprehensive development of the site to create a family heritage experience, which is all weather, excites visitors and provides flexible and functional space.

### **Improving access and connectivity**

Clearly, there are physical constraints to activities and access in the Castle, specifically space, accessibility, capacity and circulation. There is agreement that more needs to be done to improve linkages and connectivity with the town including linking with the (developing) town trail network. Development of the FHA will need to include investment in the public realm and signage to create the heritage experience and story as soon as people arrive at key gateways in the town.

### Contributing to the future regeneration of Haverfordwest

The Castle site is identified as a unique asset and re-development of the site would significantly contribute to the wider prospects and prosperity of the town. The County Council's recent commitment to acquire the Ocky White site in Haverfordwest demonstrates a clear ambition to facilitate and invest in change to revitalise the town centre. The Castle contributes to a critical mass of regeneration opportunities that collectively has the potential to transform the town's future prospects.

### Identifying future market opportunities

It is generally accepted that families are the core visitor market for the FHA seeking diversified, fun, engaging and intellectual experiences. However, a number of other market segments were identified, including the potential for the site to develop / market the site events and for the MICE market (meetings, incentives, conference and exhibitions).

### Revenue neutral

An important issue is to balance commercial opportunities with the need to retain the FHA's focus on improving access to the heritage assets of the county. It was important to structure a development package, which ensured that the new attraction was not reliant on future public sector subsidy (although it was recognised that this was likely to be required in the short / medium term).

### Driving change

Any future development plan for the Castle will need to have the support and commitment of all departments. Consultees stressed the need to put in place governance and delivery structures to ensure systemic coordination and participation of all departments as well as agents and representatives from the various public agencies responsible for regenerating the town centre.

### Summary

Based on the consultation completed to date, there is a notable level of commitment to the success of the Castle and the FHA concept and we perceive significant momentum in taking forward initiatives to make a positive contribution to its future development as an important regional attraction.

The ambition to provide a 'taster' experience and to inspire visitors to explore the rich cultural heritage and stories of the county is supported as long as it complements and contributes to existing facilities and services.

The Castle represents an important icon of the history and culture of Haverfordwest and its story provides rich insights into local history and heritage.

## 6. Flagship Heritage Attraction

This section sets out the themes and parameters for the new attraction based on the Statement of Significance (SoS), consultation with stakeholders and the industry and examples of good practice.

### 6.1 Introduction

The core component of the project is the development of a new heritage visitor attraction, with these aims:

- Making Pembrokeshire’s heritage, in its broadest sense, more accessible and an important element of the overall destination experience
- Attracting more visitors to Haverfordwest and increasing dwell times in the town
- Contributing to the regeneration of the town centre and securing a sustainable and appropriate future for the Haverfordwest Castle site

Unlike the earlier Colliers International study<sup>11</sup>, which focused solely on the Gaol building, the design envelope has been expanded to embrace the whole castle site. However, our analysis concludes that the Gaol building provides the space and flexibility to accommodate a new heritage attraction, which will have a strong emphasis on Pembrokeshire’s story (past, present and future) providing a ‘taster’ experience to inspire visitors to explore the rich cultural heritage of the county.

### 6.2 What makes a Flagship Heritage Attraction?

If the ambition is to create a new Flagship Heritage Attraction, at the outset it is important to understand what that means and, more importantly, what are the constituent components that collectively make an attraction of regional significance.

There is no agreed set of criteria or a charter mark for achieving ‘flagship’ status but it is possible to identify the core elements required – to some extent, we recognise it when we see it. Our experience suggests the following characteristics:

- An iconic, ‘must-see’ attraction, which has national / regional reach;
- Interprets a compelling story and engages visitors on different levels;
- Relatively large in size and impact;
- Its appeal is attributed to distinct qualities, including uniqueness, sense of place, authenticity, location, reputation and media attention;
- A unique theme that attracts interest and curiosity and provides opportunities for learning and discovery;
- The central component of a destination’s differentiation which determines the visitor’s travel decision and choice of destination;
- A focus on delivering a high-quality customer experience, which is supported by appropriate catering and retail offers and

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<sup>11</sup> Flagship Heritage Attraction for Haverfordwest, 2016

- Generates ancillary demand and economic benefits for the wider destination and region.

### 6.3 The Castle Site and County Collections

The historical and descriptive analysis, set out within the SoS, shows that Haverfordwest Castle is of high significance as a major medieval castle, notwithstanding its later alterations. It has an important history and is a dominant built feature in the townscape of the county town. Little remains of the medieval walled town but the castle was originally integral to this. Pembrokeshire is regarded as having some of the finest medieval castles in Britain and although Carew and Pembroke, to name but two, are more complete, Haverfordwest should nevertheless also be regarded as an important medieval site in its own right. It is important to acknowledge however that even though the Castle has strong historical significance the remaining structure lies in ruins and it is now a less impressive structure than many other monuments in Pembrokeshire and South Wales. In many ways, this heightens the need for effective and dynamic interpretation.

The post-medieval significance lies in the County Gaol and Governor's House, both of which are buildings of interest. Clearly, an opportunity exists to better interpret the castle and broader site and make them more accessible and stimulating.

It is clear that Pembrokeshire's museums have important and diverse collections that play an important role in the cultural life of the county. The museums also have a role as attractions to their towns and are therefore an important contributor to the local economies. They rely on volunteers for their day to day opening and, as such, provide an important focus for community engagement. Discussions and visits carried out as part of this statement of significance assessment have indicated that the overall cultural contribution of the existing county museums needs to be robustly defended and that the integrity of current key collections should be retained and stay where they are. The Statement of Significance clearly advises against seeking to develop a formal or centralised county museum at the Castle given the physical and environmental constraints of the site and the impact it would have on activities and collections elsewhere across the county. Discussions with stakeholders, including the FHA Working Group, conclude that the attraction needs to focus on being a heritage *experience*, rather than a traditional object-based *collections museum*.

The recent feasibility study for a Henry VII centre at Pembroke, (confirmed by the actual performance of the Richard III centre in Leicester), also identifies the difficulties of converting the story of single historic figures or heritage events, however important or significant, into thriving and viable visitor attractions, especially in a rural county, (and seasonal destination), such as Pembrokeshire. There is clearly an even bigger 'ask' for this project in terms of providing stimulus for wider regeneration in the town and an aspiration to 'reclaim' and underline its 'County Town' status. In a land of (anecdotally 641) castles, many of which are more dramatically and/or romantically located, Haverfordwest does not stand out, so any development will need to clearly differentiate this castle from those presented in more straightforward ways.

The majority of tourism visits to Pembrokeshire, whether day or stay, are not primarily motivated by heritage or culture but rather enjoyment of scenery and coastal and

countryside activities. The appeal of the most popular formal visitor attractions e.g. Oakwood, Heatherston and Folly Farm is not their connection with the locality or 'sense of place' (even though these are proudly promoted). The current Pembrokeshire Destination Plan does not encourage the development of new attractions (although the Castle already 'exists' as one) so this project will need to demonstrate significant added value to the current asset base if it is to generate 'buy-in' from across the wider visitor economy. There is also an emphasis in the plan on lengthening the season, improving the quality of the built environment and supporting the Arts and Craft sectors in the County.

Rather than taking from one or more museums to create a new one it is recommended that the flagship heritage attraction provides a dynamic 'timeline narrative' telling the story of Pembrokeshire and its people. In so doing it can signpost visitors to those places within the county where they can learn more. This approach preserves the best of what exists whilst enhancing it through raising awareness.

#### 6.4 Discover Pembrokeshire

A journey through the history of Pembrokeshire does not need to be an old-style timeline of dates and facts but it can be interactive and presented according to the visitor's interest in a variety of ways e.g. thematically, geographically or by historical period. As supported by the SoS analysis, we recommend an attraction-based approach with a compelling and accessible narrative based on our (human) impact over time on Pembrokeshire and vice versa with the working title of '**Discover Pembrokeshire**'<sup>12</sup>.

We can set parameters for such a development through the following objectives:

- Introduce the 'timeline' and highlights of Pembrokeshire's story from prehistoric to present, in an engaging and entertaining way
- Act as a signpost to other sites, attractions, collections and activities across the County where visitors can learn more, but also provide a coherent standalone experience in its own right
- Persuade the core Pembrokeshire visitor base – in Visit Wales terms, 'Family Explorers' and 'Scenic Explorers' – to become 'accidental' cultural tourists, as well as appealing to those specifically seeking out heritage or cultural experiences 'Cultural Explorers' and 'Pre-Family Explorers'
- Cover intangible as well as tangible heritage; include the quirky and everyday
- Link Pembrokeshire events, personalities and places to wider world impacts (providing points of contact for new visitors)
- Use a range of interactive, multi-sensory, innovative and immersive interpretive techniques e.g. digital, replica handling collections, activities, temporary exhibitions/ attractions (the latter to help generate repeat visits from within South Wales).
- Provide a 'must-see' anchor point on the 'West Coast Way'
- Match the quality of design, build, experience and service to the best in the county and beyond

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<sup>12</sup> The rich story of Pembrokeshire's natural heritage and wildlife is perhaps better told elsewhere and by others e.g. Oriel y Parc

- Embrace the entire site (i.e. indoor and outdoor spaces) to maximise content and appeal

### Summary

The analysis concludes that the Gaol building provides the space and flexibility to accommodate a new heritage attraction, which will have a strong emphasis on Pembrokeshire's story (past, present and future) providing a 'taster' experience to inspire visitors to explore the rich cultural heritage of the county.

A journey through the history of Pembrokeshire does not need to be an old-style timeline of dates and facts but it can be interactive and presented according to the visitor's interest in a variety of ways e.g. thematically, geographically or by historical period. As supported by the SoS analysis, we recommend an attraction-based approach with a compelling and accessible narrative based on our (human) impact over time on Pembrokeshire and vice versa with the working title of **'Discover Pembrokeshire'**

The County offers an extensive number of themes and stories of interest to the history and heritage, which need to be distilled to provide a focus for interpretation. Some can be interpreted through display of information in a variety of media such as models, maps, films and images. Other themes can be interpreted through the display of actual objects and works of art and through facsimiles of key documents. A number of examples are provided in terms of themes and interpretive mix.

## 7. Summary Recommendations and Preferred Development Mix

The Research and Assessment Report sets out an analysis of the evidence base, which provides the framework for Development Plan proposal for the site (Report 3). From a heritage perspective, the castle and its associated buildings are capable of being transformed into a flagship heritage attraction. Development of a new heritage attraction could provide a viable and appropriate solution for the castle and carefully and authentically presented, it could add value to the Pembrokeshire Museums as a whole. The new attraction could draw visitors to Haverfordwest and, in so doing, would contribute to the town's regeneration. It could also be a catalyst for increasing tourism around the county as a whole and therefore deliver a positive cultural and economic impact.

A strong Strategic Case can be made for the development of a new heritage-themed visitor attraction at Haverfordwest Castle. The strategic aims outlined in the Welsh Government's tourism strategy *Partnership for Growth*, along with Visit Wales' priorities, provide a useful steer and framework within which to develop future options for Haverfordwest Castle. There are clear opportunities for developments at Haverfordwest Castle to support the delivery of strategic priorities at national, regional and local levels. This includes the potential to make a notable contribution to town centre regeneration, the promotion of civic pride and cultural heritage, supporting wellbeing goals, providing education and lifelong learning opportunities and enhancing quality of life.

Haverfordwest town centre is a priority for regeneration investment. The Castle site is identified as a unique asset and re-development of the site would significantly contribute to the wider prospects and prosperity of the town. The County Council's recent commitment to acquire the Ocky White site in Haverfordwest demonstrates a clear ambition to facilitate and invest in change to revitalise the town centre. The rationale for acquisition identifies Ocky White as one component of a wholesale plan for Haverfordwest. The Castle contributes to a critical mass of regeneration opportunities that collectively have the potential to transform the town's future prospects.

The continuing pressure on the public purse means that a strong financial case is needed to secure County Council support regarding future sustainability and viability

Pembrokeshire is an established tourism destination with strong holiday market and day visitor levels. Haverfordwest lies in a strategic position on the road and rail network serving Pembrokeshire however it is not a leading tourist centre at present and lacks a strong cachet in the holiday market. There is a very low population base within core 60 minute drivetime contour and Haverfordwest is remote from the main originator markets. The local demographic profile shows pockets of deprivation and a relatively elderly age profile.

There is a high degree of competition within the attractions sector in the County including established and popular heritage attractions.

People visit the area primarily for the outdoor environment (stunning coast and countryside) and heritage and history are relatively low motivators among the current visitor base. There is a high proportion of repeat visits among tourism trips (some 68% of visitors are repeat arrivals). This does have implications for visitor attractions as there is a

need to provide an offer which is capable of encouraging visitors to return rather than consider that they have seen all there is to see at the site. The distance to large market conurbations means that Pembrokeshire represents mainly a holiday rather than a short break destination. The tourism industry in the County is highly seasonal - only 8% of holiday trips take place in 6 months (Oct-Mar). This has major implications for visitor attraction operations targeting the holiday market. The family market is acknowledged as an important priority target market for the County and Region and existing attractions appear keen to ensure they offer strong appeal to this market group

The Flagship Heritage Attraction is a good strategic fit against the Destination Plan particularly in terms of improving an existing facility and, critically, in providing a much needed all-weather offer.

There is an opportunity to create a high quality self-catering unit subject to available capital funding. The main opportunity lies in a high-quality conversion into a self-catering property for holiday rents, most likely a single 3-bedroom unit. There is competition but there is also a strong market in the provision of unique (even quirky), characteristic high-quality properties to rent for holiday use. This could also be used to host wedding groups as part of an inclusive wedding package. It is recognised that there are a number of operational considerations e.g. how would it interface with a flagship attraction and there could be a conflict of use between the events space and accommodation elements and this will require careful planning to overcome. There will also be some potential synergies.

Haverfordwest and the Castle site have already successfully hosted events in the past although currently there is a limited program staged in the area. Events such as the Haverfordwest Beer and Cider Festival have been staged for many years at the Castle and gained a reasonable profile and generated good footfall. The available area within the Castle Walls represents a characteristic and atmospheric space which is partially sheltered from windy conditions and lends itself well to certain events. Access and capacity are key issues in considering the use of space for events.

An increasing number of destinations are staging events and festivals as part of, or an enhancement to, their tourism product. The features of the Castle lend itself to certain performance and small festival style events. The creation of a form of events amphitheatre will provide a venue to host a series of activities and events within the walls, with seating, lighting and environmental improvements. A dedicated events space can be used for performances, entertainment as well as for a base for other leisure events.

Haverfordwest Castle site is most likely to be geared towards regional and local events. There would be a need to consider programming and the type of events which can be accommodated within the space. It will be important to identify if the events space can be covered. There is likely to be a need for public investment in the basic infrastructure and facilities which allow event organisers to then hire and use the space for permitted events, subject to obtaining the necessary licences.

The Town Council has recently negotiated an events licence with PCC to operate events at the Castle. Further discussions are needed to consider how this arrangement would be taken forward if the comprehensive redevelopment plan is taken forward. There is still

likely to be a need to work with third party specialist organisations. Cadw runs a range of events with event partners in a number of its properties although it is important to ensure there is a minimum level of disruption to the day to day operation of the attractions.

Based on the consultation completed to date, there is a notable level of commitment to the success of the Castle and the FHA concept and we perceive significant momentum in taking forward initiatives to make a positive contribution to its future development as an important regional attraction.

The ambition to provide a 'taster' experience and to inspire visitors to explore the rich cultural heritage and stories of the county is supported as long as it complements and contributes to existing facilities and services. The Castle represents an important icon of the history and culture of Haverfordwest and its story provides rich insights into local history and heritage. The analysis concludes that the Gaol building provides the space and flexibility to accommodate a new heritage attraction, which will have a strong emphasis on Pembrokeshire's story (past, present and future) providing a 'taster' experience to inspire visitors to explore the rich cultural heritage of the county.

A journey through the history of Pembrokeshire does not need to be an old-style timeline of dates and facts but it can be interactive and presented according to the visitor's interest in a variety of ways e.g. thematically, geographically or by historical period. As supported by the SoS analysis, we recommend an attraction-based approach with a compelling and accessible narrative based on our (human) impact over time on Pembrokeshire and vice versa with the working title of 'Discover Pembrokeshire.'

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**The preferred development package / product mix for the new attraction is summarised below.**

- **Improving access and connectivity between the town centre and the site through creating new gateways into the castle site; improved public realm and way-finding and a refreshed Millennium Walk project**
- **Opening up the castle walls and Inner Bailey through creating better views, with a specific focus on developing a unique events space**
- **Assessing options for decanting the Haverfordwest Town Museum into the Gaol building (or alternative site) and reviewing new commercial uses for the Governor's House**
- **Developing the Gaol building into the flagship heritage attraction, i.e.:**
  - **Flagship Heritage Attraction – the Pembrokeshire Timeline**
  - **Haverfordwest Town Museum**
  - **Commercial space**
  - **Café**

- **retail**
- **Themed play: indoor and outdoor**
- **Flexible space**



<b>Music</b>	Huw Stephens Presents	<a href="http://www.mwldan.co.uk/whatson/live-tm-tm-byw/huw-stephens-yn-cyflwyno-presents#.W5bePhrTWWhA">http://www.mwldan.co.uk/whatson/live-tm-tm-byw/huw-stephens-yn-cyflwyno-presents#.W5bePhrTWWhA</a>	Mid July	One off - but may repeat	Cardigan Castle	26 miles
	Lost Cove Festival - Music & Surfing	<a href="https://www.thefestivalcalendar.co.uk/festivals/Lost_Cove_Festival_2018">https://www.thefestivalcalendar.co.uk/festivals/Lost_Cove_Festival_2018</a>	Mid March	Annual	St. Davids	16 miles
	Aber Jazz, Jazz and Blues Festival	<a href="http://www.aberjazz.com/2018/html/About%20Aberjazz.html">http://www.aberjazz.com/2018/html/About%20Aberjazz.html</a>	August	Annual	Fishguard	15 miles
	Tenby Blues Festival	<a href="https://www.tenbyblues.co.uk">https://www.tenbyblues.co.uk</a>	Mid November	Annual	Tenby	23 miles
	Fishguard International Music Festival	<a href="https://fishguardmusicfestival.co.uk">https://fishguardmusicfestival.co.uk</a>	End July	Annual	Fishguard	15 miles
	The Fishguard Folk Festival	<a href="https://fishguard-folk-music.co.uk/fishguard-folk-festival.html">https://fishguard-folk-music.co.uk/fishguard-folk-festival.html</a>	End May	Annual	Fishguard	15 miles
	St Davids Cathedral Festival	<a href="https://stdavidscathedralfestival.co.uk">https://stdavidscathedralfestival.co.uk</a>	End May	Annual	St. Davids	16 miles
<b>Health &amp; Wellbeing</b>	The Big Retreat	<a href="https://www.thebigretreatwales.co.uk">https://www.thebigretreatwales.co.uk</a>	End May	Annual	Lawrenny	16 miles
	Unearthed Festival	<a href="https://www.unearthedfestival.co.uk">https://www.unearthedfestival.co.uk</a>	End June	Annual	Solva	12 miles