

## Pembroke Dock Tourism Feasibility Study Final report – November 2019

### Contents

1. Introduction	1
2. Project activities	2
Appendix A: Overview of document review	8
Appendix B: Stakeholders consulted / attended workshop	14
Appendix C: SWOT Analysis	15
Appendix D: Summary of survey findings	20
Appendix E: Options appraisal overview	29
Appendix F: Potential funding sources	38

### 1. Introduction

Pembroke Dock Town Team, together with the Pembroke Dock Tourism and Heritage Group (“the project partners”), commissioned Responsible Tourism Matters and Acorn Tourism Consultants to conduct this feasibility study between September 2018 and October 2019. Funded by Arwain Sir Benfro (LEADER Pembrokeshire), the primary project objective was to “research, provide information for and [support production of] one or more business plans for social enterprise projects to encourage locals and visitors alike to spend more time and money in Pembroke Dock”.

Interim reports and updates have been provided to the project partners throughout the project. This report provides a final summary of the project activities we have carried out, the outcomes of those activities culminating in an options appraisal process, our recommendations for the two strongest options and outline business plans for those projects.



## 2. Project activities

### 2.1 Inception and situation analysis

An initial two-day visit enabled us to meet the project team, visit key sites and familiarise ourselves with the local area and context for the project. Some early stakeholder consultation was also carried out at this point (see 2.3 below).

### 2.2 Document review

A comprehensive document review was then carried out, covering the following areas. A summary of findings is included in Appendix A.

- The strategic and political context for this project – in the light of the new tourism strategy for Wales (see below);
- The economic context – by reference to data on employment, wages, deprivation indices and local regeneration frameworks;
- Tourism information and data (Wales-wide as well as local and regional) including available market research by other organisations and visitor information from Pembroke Dock Heritage Centre and Milford Haven Museum;
- Information on and from Milford Haven Port Authority, including information on its future development plans, the Swansea Bay City Deal and the heritage assets within the Port's ownership in Pembroke Dock;
- PCC regeneration frameworks;
- Potential funding sources: the outcomes of this review are presented in Appendix F.

The new tourism strategy for Wales, *Welcome to Wales: Priorities for the Visitor Economy 2020-2025* sets sustainability as the top strategic priority for tourism development in Wales. This is reflected in five new goals:

1. Economic growth
2. Environmental wellbeing
3. Cultural wellbeing
4. Health wellbeing
5. Satisfaction for visitors and local people

This represents a significant change from the previous single goal (a 10% increase in tourism revenue – now almost achieved). Sustainability will also be central in future funding decisions on tourism projects made by the Welsh Government and job creation will no longer be the defining metric<sup>1</sup>.

### 2.3 Stakeholder consultation

This comprised individual interviews and meetings with over 30 individuals (including some who attended the final workshop) representing different groups and organisations, who were extremely helpful in providing a wealth of information on local heritage assets, businesses, enterprises, interest groups and tourism markets. A list of those consulted is provided in Appendix B.

Based on the findings of our situation analysis, stakeholder consultation and document review, we produced an initial SWOT analysis of the strengths, weaknesses, opportunities and threats relating to potential tourism

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<sup>1</sup> Source: Next Tourism Generation Alliance, <https://nexttourismgeneration.eu/visit-wales-confirms-sustainability-as-the-top-priority-in-the-new-national-tourism-strategy/>

development in Pembroke Dock, which is provided in Appendix C. This was updated as the project progressed, as further information and insights emerged.

## **2.4 Market research**

531 surveys were conducted<sup>2</sup> between May and September 2019, with residents of the town, the surrounding area and further afield, to understand what would most appeal to them and encourage them to spend more time and money in the town.

The outcomes of this survey are reported in Appendix D. In summary, residents of Pembroke Dock were particularly interested in indoor / all year round attractions based on entertainment / leisure and children's facilities. They also showed strong interest in boat trips, as did residents of the surrounding area and visitors. In terms of attractions or activities based on Pembroke Dock's story, all survey categories also reported a relatively high interest in visiting a historic building, followed by guided tours and storytelling, hands-on activities at a museum and outdoor art.

## **2.5 Analysis and options appraisal**

Our findings from all the activities above enabled us to produce a 'long list' of potential individual projects, which, if well developed and managed, could meet the objectives of this project. They were grouped into four main categories:

- (a) Individual sites / potential attractions;
- (b) Activities;
- (c) Services and
- (d) Destination management and marketing.

### **Options appraisal process**

Each option was then carefully considered in terms of:

- The pros and cons of each project;
- Potential of each individual option to contribute to the core objectives of this project<sup>3</sup>:
  - A. Increasing visitor time and spend in the town of Pembroke Dock
  - B. Stimulating year round local employment and enterprise
  - C. Generating pride in Pembroke Dock
  - D. Protecting community assets
  - E. Promoting community involvement
- Feasibility in terms of being operated as a social enterprise (assessed as low / medium / high) relating to leadership, capacity to be able to run the project, access to resources and staffing / volunteers required and commercial viability.

An overview of the options appraisal process (with those scoring highest shaded dark green, and other strong options in light green) is provided in Appendix E. As shown in this overview, by applying the above criteria, we concluded that the two strongest options which we would recommend the project partners take forward are:

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<sup>2</sup> 421 of these were completed online (via a link shared on relevant social media pages), and a further 110 face-to-face in Pembroke Dock (45), Pembroke (37), Milford Haven (19) and other locations (9).

<sup>3</sup> All of which are underpinned by the principles of the seven goals of the Wellbeing of Future Generations Act 2015

## **1. Developing a strong management structure to coordinate tourism activity and business collaboration**

Pembroke Dock is rich in stories. It has a wealth of history and heritage that needs to be interpreted and shared and that, collectively, would be very powerful in differentiating the town from its neighbours and in driving change. However, currently each story is being told individually and there is no consistency or vision to how Pembroke Dock would like to be perceived, nor a plan for how to get there. There are many different, passionate voluntary groups and whilst there is already some collaboration, they are all competing for funding and prominence rather than pulling together in the same direction. Without a cohesive vision Pembroke Dock's businesses and attractions are struggling to be seen, and collaboration and coordination is vital to delivery of that cohesive vision.

In order to have impact, existing and new tourism activities therefore need a vehicle for (1) coordination and joint marketing and (2) cooperation between the many individuals, groups and businesses involved. Development of a collaborative destination management and marketing structure should achieve these aims. Establishing a cohesive group will also make it easier to work with other potential partners, submit funding bids and so on.

The Town Team is a volunteer group, representing the interests of the town. However, at present it is under-resourced, and the currently available funding is allocated to recruiting a coordinator or 'town champion' to develop the 'Discover Pembroke Dock' website.

The outline plan provided with this report sets out a proposed process with the aim of establishing a Destination Management and Marketing Organisation (DMMO) as a structure within which to engage stakeholders to develop a shared vision, supported by a place making exercise.

The model to be adopted will very much depend on the resources, capacity and support available inside and outside the group. The main elements to be decided will be the leadership model, funding structure and coordination of activities. In each case this may be led by a single entity, or a combination of more than one entity working together. This is expanded upon in the outline business plan.

The box below also provides a practical case study from a comparable destination in Pembrokeshire (Fishguard and Goodwick Chamber of Trade and Tourism).

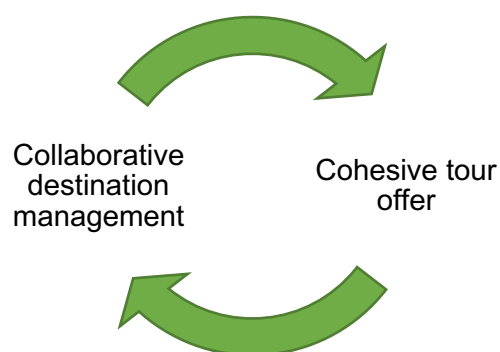
## **2. Developing experiences and tours**

This is a project to link up and strengthen the existing tourism offer, linking the two 'hubs' of the Heritage Centre and Hancock's Yard and developing the latter as a focus for hands on activities. This project is closely linked to the wider development of a clear vision and identity for the town of Pembroke Dock, ideally through a placemaking study and engagement process. It also offers a way to support and feed into that process.

The project would focus on developing experiences and tours (and bringing together those already on offer) including walking tours and boat trips, and provide a way of supporting the local food offer and bringing people into the town. It would also be a good way to gauge interest in and appeal of the various assets in Pembroke Dock, and provide a natural 'home' for other attractions as they are developed.

The project would specifically focus on guided tours, since the power of personal storytelling and guiding is central to its success. Self-guided or app-based routes are unlikely to be successful until the tourism and wider infrastructure of the town has been improved.

These two projects would each feed into and support the other; the first providing a decision making and management structure to facilitate the development of tours and experiences; and the tours project a practical way to begin to work together quite quickly, and to build on the work already done and the resources already available.



## Case studies

### Case study: Fishguard & Goodwick Chamber of Trade and Tourism<sup>4</sup>

The Fishguard and Goodwick Chamber of Trade and Tourism is an integral part of the Fishguard and Goodwick Town Team. The Town Team pushes forward the local Development Plan, which is updated after each Town Team meeting. As the Town Team looks to review its aims the Chamber proposes that the Town Council will take more of a lead role, once it has established full communication systems with its partners, including the business community.

The Chamber is a representative voice for businesses in the area and works to build co-operation for the benefit of all, and especially for the local economy. Chamber members pay a fee, in return for which they have a free one page entry on the GoFishguard website ([www.gofishguard.co.uk](http://www.gofishguard.co.uk)) and on the “Fishguard Bay Guide” App. The website is also open for any business in the area to promote their goods and services, without their needing to be a member of the Chamber, and the What’s On section publicises all important local public events free of charge. The Chamber also offers business networking and support, and offers new business start-ups advice and support in matters of marketing, premises, training and funding needs, either directly or through other agencies. It also produces a newsletter for those who have signed up as “Friends of Fishguard” from the GoFishguard website.

The Chamber is a member of Pembrokeshire Tourism and its individual members also qualify for a reduction in membership fee to Pembrokeshire Tourism. It is also a member of the Pembrokeshire enterprise Network UK Coach Tourism Association.

The Chamber has also obtained funding for a number of projects in recent years, including:

- A 2-year project (2015-2017) – ‘Refreshing North Pembrokeshire’ (RNP) with a grant of £291,000 from the Coastal Communities Fund. This project enabled major investment in the meet and greet for visiting Cruise Ships at the port: Fishguard Bay Welcome (FBW). The FBW team of staff and volunteers was jointly funded by Stena and the Chamber, and contributed to an estimated > £680,000 coming into the immediate area in 2017 from 28 cruise calls. Funding from the project was used to purchase a former Army recruitment trailer, which was adapted to be used at the port during the cruise season to promote Fishguard and the area;
- A £17,000 LEADER grant to develop a set of boutique tours across North Pembrokeshire for cruise passengers and other visitors. Several tours were offered to two cruise ships for 2019 at the request of their travel operator;

<sup>4</sup> Sources: <http://www.gofishguard.co.uk/local-services/fishguard-goodwick-chamber-of-trade/what-does-the-chamber-do/>; <http://www.gofishguard.co.uk/local-services/fishguard-goodwick-chamber-of-trade/>; <http://www.gofishguard.co.uk/local-services/fishguard-goodwick-chamber-of-trade/fishguard-friendly/>; <https://www.facebook.com/FishguardGoodwickChamberOfTradeAndTourism/>; personal communications.

- The Fishguard Friendly Scheme, to help promote Fishguard & Goodwick as a friendly, co-operative and pleasant environment for local residents and visitors;
- Home hosting: arranges the Home Hosting for Grand Circle Cruise Ltd, whereby their travellers visit people's homes for lunch instead of returning to the ship;
- Publication of the 2018 Last Invasion Country booklet, distributed throughout the region bringing many more visitors into the area.

**Case study: Ironbridge Gorge Museum Trust** [www.ironbridge.org.uk](http://www.ironbridge.org.uk)

Although this is clearly a different location to Pembroke Dock, its interest is in that each of the individual sites tell **only** their distinct part of the Ironbridge story. Visitors are likely to 'go to Ironbridge' i.e. to the whole destination, and to perceive it as a cohesive entity, rather than only to visit one of the ten individual museums.

*"Ironbridge Gorge Museum Trust manages 10 museums within a World Heritage Site. ... Its purpose is to preserve and interpret the remains of the Industrial Revolution in the six square miles of the Ironbridge Gorge. Ironbridge is a registered educational and heritage conservation charity, with a related trading company. ...*

*Preserving and telling the story of the industrial revolution is at the heart of the Trust's Value Proposition to a range of Customer Segments. Visitors are core to these segments, including schools, families and other mature heritage-interested visitors. The range of Customer Segments works well to create diverse income streams throughout the year. In school holidays families with children under 12 are a particular focus. During term time schools and older couples are core customers. Grandparents bringing pre-school children are a growing segment. ...*

*The majority of visitors buy an 'annual passport ticket', which allows unlimited access to the 10 museums for a year. Most marketing investment goes into promoting the Victorian town experience at Bliss Hill, where an 'attract and disperse' strategy leads people to other sites. ... The programme has become increasingly event driven, responding to customer behaviour. Events and festivals will increasingly last a week and become a driver for visits rather than a 'bonus' for those visiting anyway. ...*

*Volunteering and partnerships also play a key part in the model for Ironbridge. Although they never substitute for paid staff, there are over 1,000 volunteers who support the Trust in a variety of ways. ... Nearly 30% of the Trust's volunteers are under 30 years of age. The Trust invests in volunteer training and corporate volunteering is a big area of partnership."<sup>5</sup>*

## 2.6 Production of outline business plans

These recommendations were presented to a stakeholder workshop in October 2019 to gain feedback and support to take forward the preparation of an outline business plan for these two options. This is now provided with this report. The intention is that this outline plan should be developed by the group to push forward the creation of a DMMO and to start the tours project, and to guide future activities.

## 3. Further recommendations

### Place making

This study has highlighted how valuable it would be for the newly constituted Destination Management and Marketing Organisation to commission a place making exercise to develop a transformative vision for

<sup>5</sup> Source: AMA Culture Hive (2015) Ironbridge Gorge Museum Trust – Business Model Case Study. Available from <https://www.culturehive.co.uk/wp-content/uploads/2015/09/FPM-Ironbridge-Case-Study.pdf>

Pembroke Dock. Such a study would help to establish a common, strong narrative for the town based on its unique identity and story, which in turn will provide a framework for the development of further projects.

Such a study should comprise three stages:

1. Developing a place story to shape the future development of Pembroke Dock based on what local people are proud of and how they want to see their place develop;
2. Developing a destination management plan including actions for how to maximise investment, regeneration, tourism and civic pride;
3. Developing a visual language and identity toolkit – only once the two above activities are completed.

#### **A note on package travel**

The Package Travel and Linked Travel Arrangements Regulations 2018 essentially define a 'package' as a pre-arranged combination of two or more elements including:

- Transport
- Accommodation
- Other travel services that make up a 'significant proportion' of the package – e.g. excursions, spa treatments, activities and equipment rental.

As well as pre-arranged or specially customised packages, this also includes 'linked travel arrangements' which occur (1) when a customer books two or more individual elements (provided by different businesses) via one entity at the same time – even if each element is paid for separately; or (2) where a customer has booked one travel service and is then invited to book another and does so within 24 hours: for example, where a customer books accommodation, is invited to book a tour and does so within 24 hours.

The organiser of a package is potentially liable to the customer for e.g. loss of value; reasonable 'out of pocket' expenses; loss of enjoyment caused by things going wrong; and damages for personal injury. Although the organiser would then be able to pursue whoever was at fault to recover the compensation paid, this can be complex and time consuming. An operator must be bonded (or keep customers' funds in a trust account). Insurance should be taken out to cover the organiser in the event of financial failure.

## Appendix A: Overview of document review

### 1. The strategic and political context

**Wales Tourism Strategy:** Sets sustainability as the top strategic priority for tourism development in Wales, reflected in five new goals:

1. Economic growth
2. Environmental wellbeing
3. Cultural wellbeing
4. Health wellbeing
5. Satisfaction for visitors and local people

Sustainability will be central in future funding decisions on tourism projects; job creation will no longer be the defining metric.

**Pembrokeshire Destination Management Plan (2013-2018 - no new plan to date) – Objectives:**

- i. Working together effectively;
- ii. Re-focusing marketing;
- iii. Creating a year-round quality experience;
- iv. Developing and sustaining infrastructure, environment and cultural resources – including local distinctiveness;
- v. Improving business practice, profitability and performance – including attractive jobs.

#### **Wellbeing of Future Generations Act 2015**

Goal: a Wales that is prosperous, resilient, healthier, more equal, with cohesive communities, a vibrant culture and thriving language and a sense of global responsibility. Emphasises the importance of long-term sustainability and collaboration.

### 2. Economic context

- Unemployment in Pembrokeshire: 4.5%, below the Wales average of 4.9% and slightly above the Great Britain average of 4.3%.
- Average gross weekly wage for full time workers in Pembrokeshire is £449.10, 9.9% lower than the average for Wales and 18.7% lower than the average for Great Britain
- Index of Multiple Deprivation (2014): Where 1 was the most deprived and 1,909 the least: Pembroke Dock Central ranked 201 out of 1,909 in Wales; Llanion (1) 67; Llanion (2) 707; Market 703; Pennar (1) 487; Pennar (2) 714.
- High proportion of retail vacancies
- Regeneration Framework (see below)

### 3. Tourism information and data

#### **Wales statistics:**

- International visitors in 2016: 1.1 million
- Those travelling for leisure: 430,000 in 2017, spending £177 million. Holiday (4+ nights)
- UK (domestic): 9 million overnight trips – of which 5.7 million for leisure in 2017, staying an average of 3.7 nights, spending £1.2 billion. 25% visit Wales for their main holiday of the year.
- For both: most significant age group is 35-54 travelling as couples or families primarily for short breaks
- Day visits: 100 million trips in 2017 spending £4.3 billion. Average spend per day for day visitors undertaking a specific activity was £27.90
- Number of nights spent and expenditure fell in 2017



### Local / regional:

- Figures available for Wales and Pembrokeshire – not at town level
- Most recent visitor numbers for Pembrokeshire are for 2015: approximately 4.3 million visitors:
- Just over 2.3 million overnight visitors (of which just over 1 million were estimated to be domestic visitors)
- Just under 2 million day visitors – up 4.9% from the previous year
- 90,000 (2%) from outside the UK
- Recreation accounts for 7.7% of the economic impact created by those visitors within the tourism sector, and 5.7% of full-time employment in the sector
- Domestic visitors to South West Wales stay just under 4 nights and spend £192 per person, per trip. Both are higher than the 'all Wales' averages.
- Total spend on overnight domestic trips to Pembrokeshire in 2016 totalled £247 million. Spend by international visitors was approximately £23.8 million.
- No visitor figures specifically for south Pembrokeshire. Pembroke Dock ferry terminal handles 340,000 passenger movements each year (the majority of which are presumably return trips, so a conservative estimate would be 170,000 passengers), and in 2018 three cruise ships docked at Pembroke Dock
- Most recent Pembrokeshire visitor survey (2011-2012): visitors surveyed reported going to the following places in South Pembrokeshire:
  - Tenby 36%
  - Haverfordwest 23%
  - Pembroke 21%
  - Saundersfoot 19%
  - Narberth 18%
  - Milford Haven 9%
  - Pembroke Dock 8% (It should be noted that the ferry passenger numbers above account for 4% of the 4.3 million annual visitors to Pembrokeshire)
  - Dale 8%

### Pembrokeshire Visitor Survey 2011-2012

- Pembrokeshire appeals to visitors of all ages. South Pems attracts slightly younger profile than west and north;
- Three quarters of visitors in ABC1 social class compared to a UK average of approx half the population;
- 5% of visitors are from overseas; remainder divided fairly equally between those from within and outside Wales;
- 25% visited more than once a month (up from just under a fifth in 2007/8) and proportions 'very likely' to return to Pembrokeshire in the near future are at their highest levels;
- Day trips 25% of all visits; Staying trips nearly 70%
- The average number of nights stayed has reduced from 6.8 in 2007/8 to 6.3 in 2011/12
- The natural environment is key to the visit experience with elements such as *award winning beaches, a range of natural attractions* and *walking* viewed as the most important elements of the trip and also seen as the best performing elements of the trip;
- Previous visits inform the current visit. Internet use rising with just over a fifth sourcing information this way prior to their visit. During the visit nearly two thirds have mobile internet access during their trip with nearly three in five using their mobiles to source trip information;
- Activities are focused on enjoying the landscape: over a quarter of visitors come to walk with one in ten coming to visit the beach and 8% visit natural attractions;
- The proportions undertaking walking has increased as an activity between 2007/8 and 2011/12: with long walks (2+ hours) increasing from 23% to 30%;
- Nearly two thirds stayed in paid accommodation and a third in free accommodation. In paid accommodation self catering remains the most popular type with over a quarter renting a self-catering property.

## **‘Celtic Routes’ Mapping and Audit Project (2018)**

Objectives: to understand short break / holiday behaviour and preferences; measure awareness and perceptions of Celtic Routes area as a holiday destination; test propositions: relevance, appeal, extent to which they motivate. The project concluded that:

1. The elements which make [the three counties of Celtic Routes Wales – Pembrokeshire, Ceredigion and Carmarthenshire] stand out and give it appeal in a competitive market place are:
  - The drama of the landscape – the scenic viewpoints, mountains, forests, rivers and coastline in particular
  - The visual appeal of painted houses in characterful towns and villages (supplemented by good places to stay and eat, and independent shopping)
  - The cultural heritage of the area particularly around Christian and pre-Christian sites and stories
  - Activities of all types which take place in dramatic landscape and along the coastline, from gentle walking to adrenaline-fuelled sports.
  - The coast – islands, coastal path, cliffs, beaches, dunes, boat trips
  - Places to relax and reflect
  - Wildlife – particularly sea-based - dolphins, seals, puffins, guillemots, razorbills – and red kites inland
  - The opportunity to visit, learn from and buy from artisans and craftspeople who are inspired by the place and using local produce
2. The three market segments with potential for the Celtic Routes area are:
  - a. **Cultural Explorers** – affluent older couples, motivated by heritage, culture, beautiful landscapes and authentic experiences
  - b. **Active Explorers** – couples looking to get off the beaten track, motivated by activities, sightseeing, unspoilt coast and countryside
  - c. **Active Family Explorers** – families spending time together, looking for lots to do, fun, adventure and activity, exploration and discovery.
- For those markets:
  - Cultural: Colourful towns with character was strong forerunner
  - Active: ‘Untamed Wales’ standout winner
  - Family: Castles, Countryside and Coast appeals to the largest proportion, significant minorities find the alternatives (Mini adventures in the wild / Tire out the teens) more appealing
- Websites dominate as source most likely to be used before and during a trip to access destination information

### **Pembroke Dock Heritage Centre surveys**

- Visitor data 2017: 8081 visitors (86% adults, 14% children)
- Peak season June to September; shoulder seasons April, May, October
- Volunteer data: 65.3% from Pembroke Dock and Pembroke; over 90% from Pembrokeshire. 93.5% over 56 (50% age 66-75). No volunteers under 36. 55.6% male, 44.4% female. 80.4% retired. Rich skill set available.

### **Milford Haven Museum visitor survey 2015**

Conducted at the end of the season (September / October) and before improvements were made to the museum, which have boosted visitor numbers. The sample was also small, with under 60 respondents:

- 42% were prompted to visit the museum because they were walking past; 21% through word of mouth;
- 92% were first time visitors;
- 17.6% of visitors were from Pembrokeshire, 21.6% from elsewhere in Wales, 51% from England, 9.8% from outside the UK.
- 38.1% of visitors over 65 and 29.5% in the 51-65 age group;

- 44.8% of visitors were male and 55.2% female;
- When asked what additional amenities / facilities they would like to see in the museum, the top three choices were interactive exhibits, workshops e.g. on family history, story telling and a café.

**Feasibility study for the potential development of heritage tourism in Pembrokeshire by 360 Tourism Consulting for PLANED (2010)**

Reported target markets for industrial heritage:

- General short and extended breaks (especially 'curious minds')
- Special interest and cultural heritage breaks
- Active seniors/empty nesters and early retired (especially curious and live life to full types)
- Young couples without children
- Families, especially with younger children (especially explorer types)
- Visiting Friends and Relatives
- Irish market - short/extended breaks market playing to historic links;
- North American markets attracted by many cultural links and interests including genealogy
- Day visitors within a 2 hour drive

**4. Information on Milford Haven Port Authority – Proposed development of Gate 4 area**

- Pembroke Dock Marine is part of Swansea Bay City Deal - £76.3m investment to include redevelopment of site for modern industrial requirements, notably the marine energy, boat building, floating wind, nuclear, oil and gas exploration and decommissioning and aquaculture industries.
- Development plan focused on creating high skill, year round, long term employment, economic growth and strengthening supply chain resilience. Creation of 650 jobs including highly skilled roles.
- Aim is to allow Gate 4 to operate effectively for modern industry – currently out-dated superstructure that is unsuitable for modern industry.

**Pembroke Dock Marine**

4 pillars:

- Marine Energy Test Area (META): delivered by Marine Energy Wales – supporting early stage marine energy technology developers. Eight short term testing sites – devices to be in water for between 1 – 12 months maximum. <https://www.marineenergywales.co.uk/meta-sites/> Plans include a Marine Energy Visitor Centre.
- Marine Energy Engineering Centre of Excellence (MEECE): delivered by ORE Catapult – to provide specialist knowledge, experience and capability for the benefit of the marine energy industry. Will bring expertise and capabilities of Welsh universities & Ore into direct contact with technology developers and their supply chains. To be based in Pembroke Port.
- Pembroke Dock infrastructure: delivered by MHPA – creation of large open plan fabrication and laydown areas and land to sea transition space suited to the needs of modern industry. 46,529m<sup>2</sup> of work area (15,584m<sup>2</sup> with engineered concrete surface), with new supersize slipway, amenity enhancement and extension of berthing space for marine energy work boats.
- Pembrokeshire Demonstration Zone: delivered by Wave Hub Limited – will target wave and floating wind technologies ready for array scale deployment. 90 sq km: largest seabed agreement for wave energy in the world. Objective to ensure developers have access in the UK to a logical stepping stone designed to prove commercial viability.

## Heritage assets in the Gate 4 zone

The Gate 4 zone includes many heritage assets, which are listed in detail in the attached document prepared by the Save the Commodore group. Of particular interest to this project are:

- Graving Dock (Grade II\*) and adjacent slipways

Heritage perspective: Of national importance – the best surviving dry dock in the Dockyard – would attract heritage ships to come for repairs and maintenance, enhancing the tourism appeal. Vacant land could be used for heritage workshops and tourist facilities .

Port response: Has researched ways to bring Graving Dock back into commercial use in its current form but costs are prohibitive, and even if repaired, it would not be appropriate for modern shipping needs. Also necessary to cover over the Graving Dock to create the width required for water access.

- Pickling Pond (Grade II)

Heritage perspective: Could illustrate how the dockyard worked as well as being ideal for many water-based activities

Port response: Has researched ways to bring Pickling Pond back into commercial use in its current form but costs are prohibitive

To note:

- Will need Heritage Impact Assessment
- Planning process
- CADW involvement

General points made by MHPA:

- Renovation and repurposing of other onsite heritage assets for the use of industry is at the heart of the Pembroke Dock Marine plan. Many of the site's heritage buildings now being used for modern commercial operations and helping to boost the region's economy
- Interested in looking at ways to mitigate impact and tell the story of Pembroke Dock outside these industrial, non-public access spaces. There is an interesting story to tell and the Port believes this is best done offsite and in collaboration with the community, museum and heritage groups.
- Seeking to balance its industrial developments by investing in the redevelopment of other heritage assets on site which can be used by industry, and by supporting community heritage projects away from the non-public access industrial zones
- Opportunities e.g. boat tours along water frontage, redevelopment of Carriage Drive area for interpretation and community use, and the development of digital interpretation that shows how the site has developed over time.

## 5. PCC Regeneration frameworks

### Pembroke Dock

- New development / Re-development (Flagship sites): St Govan's Centre / Dimond Street; Gordon Street / Western Way; Martello Quays
- Enhancing Town Centre vitality: Refine and condense high street; improve signage and linkages; relocate market; improve food and drink offering; consolidate community groups
- Improving movement and access: improve accessibility, linkages and the pedestrian experience of Pembroke Dock
- Promoting heritage and tourism: website, visitor information point, promotion at ferry terminal; link Pembroke Dock visits with other tourist attractions in the vicinity e.g. Pembroke; real potential to develop a town trail to enhance and promote heritage offer

- Milford Haven Port Authority should be encouraged to embrace the heritage and incorporate development of these assets in its masterplan for the area; develop programme of events; promote links to Star Wars through town centre trail or a stand-alone attraction.
- Developing employment and skills opportunities: embrace Pembroke Dock Marine investment and seek opportunities for spin-off investment, growth and job creation.

**Pembroke**

- Heritage a key asset
- Need to drive more people into the town centre – not just the Castle
- Recommended a second attraction – Henry VII Centre

## Appendix B: Stakeholders consulted / attended workshop

- Adrian James, Save the Commodore
- Alan Turner, Pembrokeshire County Council
- Alec Denny, Pembrokeshire Coastal Forum
- Alexandra Lort-Phillips, Tall Ships Wales Trust / Seafair Haven
- Andrew Campbell, Pembrokeshire Tourism, Wales Tourism Alliance
- Billy Gannon, Doc on the Map / Visit Pembroke Dock
- Brian King, West Wales Maritime Heritage Society
- Clare Stowell, Milford Haven Port Authority
- David Blackmore, Wales Official Tourist Guides Association
- Dennis O'Connor, Pembrokeshire Tourism
- Dilys Burrell, Pembroke Dock Town Team / Town Council
- Doug Jones, Defensible Barracks
- Elizabeth Gossage, Heritage Forum
- Gareth Mills, Sunderland Trust
- Guy Anderson, Fort Road Gun Tower and Paterchurch Tower
- James Parkin, Pembrokeshire Coast National Park Authority
- Jeremy Martineau, Fishguard & Goodwick Chamber of Trade & Tourism / Fishguard Bay Welcome
- John Evans, Pembroke Dock Museum Trust
- John Gibbs, Save the Commodore
- Julie Gannon, Doc on the Map / Visit Pembroke Dock
- Liz Williams, Pembrokeshire Tourism
- Martin Cavaney, Pembroke Dock Museum Trust
- Mike Cavanagh, Pembrokeshire County Council
- Paula Holt, Tall Ships Wales Trust / Seafair Haven
- Polly Groom, Cadw
- Sinead Henehan, Pembrokeshire County Council
- Stella Hooper, Milford Haven Port Authority
- Steve Roblin, Llanion Cove
- Stuart Berry, Sunderland Trust (Pembroke Dock Heritage Centre) / Planed
- Sue Kenny, Milford Haven Museum
- Tim James, Milford Haven Port Authority

## Appendix C: SWOT Analysis

<p><b>Strengths</b></p> <p><b>Potential story/ies</b></p> <ul style="list-style-type: none"> <li>• People are a huge asset</li> <li>• Quirky character</li> <li>• Strong heritage story</li> <li>• Emerging strong renewables / green story</li> <li>• Military connections</li> </ul> <p><b>Location and accessibility</b></p> <ul style="list-style-type: none"> <li>• Close proximity to Pembroke Town</li> <li>• Location on the river</li> <li>• Good road connections</li> <li>• Train station</li> <li>• Lots of parking</li> <li>• Town is walkable</li> </ul> <p><b>Assets</b></p> <ul style="list-style-type: none"> <li>• Heritage assets – already operational: Pembroke Dock Heritage Centre, West Wales Maritime Heritage Museum including Tenby Lugger</li> <li>• Other heritage assets with potential</li> <li>• Events e.g. Seafair Haven, Bungee off the Bridge, Haven Festival</li> <li>• Other visitor amenities e.g. The Cove</li> <li>• Work already done on trails etc e.g. Dockyard trail</li> </ul> <p><b>Tourist facilities</b></p> <ul style="list-style-type: none"> <li>• Good reasonably priced food</li> </ul>	<p><b>Weaknesses</b></p> <p><b>Identity</b></p> <ul style="list-style-type: none"> <li>• Poor aesthetic in many parts of the town and no ‘sense of arrival’ for visitors</li> <li>• Lack of local pride</li> <li>• No clear identity</li> <li>• Parts of the town are unattractive to visitors</li> </ul> <p><b>Tourism facilities</b></p> <ul style="list-style-type: none"> <li>• Lack of good quality town centre food and drink offer</li> <li>• Lack of high quality accommodation</li> <li>• Relatively low accommodation stock<sup>6</sup></li> </ul> <p><b>Assets</b></p> <ul style="list-style-type: none"> <li>• Uncertainty over tenure for heritage properties mean potential is not currently maximised</li> <li>• Carriage Drive properties in private ownership not maintained</li> <li>• Lack of funding</li> </ul> <p><b>Infrastructure</b></p> <ul style="list-style-type: none"> <li>• High proportion of retail vacancies</li> </ul> <p><b>Demographics</b></p> <ul style="list-style-type: none"> <li>• Older volunteer base</li> <li>• Low engagement of younger groups</li> </ul> <p><b>Coordination</b></p>
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<sup>6</sup> Online search (TripAdvisor, Agoda, Booking.com and Airbnb) identified 5 B&Bs / guesthouses; 2 hotels; 1 pub with rooms; 5 self-catering properties and 9 Airbnb listings.

<ul style="list-style-type: none"> <li>• Low budget accommodation</li> </ul> <p><b>Infrastructure</b></p> <ul style="list-style-type: none"> <li>• Indoor space available</li> <li>• Low rents</li> <li>• Some national retailers and independent shops</li> <li>• Some of the local character has been maintained</li> </ul> <p><b>Committed individuals and groups</b></p> <ul style="list-style-type: none"> <li>• Volunteers with strong knowledge</li> <li>• Commitment to collaboration</li> <li>• Groups focused on particular assets e.g. Supportive of Save the Commodore</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of formal coordinating group</li> <li>• Multiple heritage groups – overlapping objectives, duplication of effort, confusing for visitors</li> <li>• No business group</li> <li>• No tourism group</li> <li>• Volunteer dependency</li> </ul>
<p><b>Opportunities</b></p> <p><b>Identity</b></p> <ul style="list-style-type: none"> <li>• ‘Fit’ with story of nearby towns e.g. Milford Haven maritime / use of the waterway; Pembroke for heritage; other local military sites</li> <li>• Subject to funding, opportunity to commission a place-making study</li> </ul> <p><b>Political landscape</b></p> <ul style="list-style-type: none"> <li>• Wales Tourism Strategy – Sustainability the strategic priority.</li> <li>• Previous strategic focus has included place-building – developing destinations that people want to visit and recommend; and providing opportunities for local communities to deliver memorable visitor experiences</li> </ul> <p><b>Market</b></p> <ul style="list-style-type: none"> <li>• Pembrokeshire has a loyal market – regular, frequent visits, all seasons</li> <li>• Survey respondents showed interest in: <ul style="list-style-type: none"> <li>○ Indoor / all year round attractions based on entertainment / leisure and children’s facilities.</li> <li>○ Boat trips</li> </ul> </li> </ul>	<p><b>Threats</b></p> <p><b>Assets</b></p> <ul style="list-style-type: none"> <li>• Threats to heritage assets from Port development</li> </ul> <p><b>Market</b></p> <ul style="list-style-type: none"> <li>• Tourism investment focused on North Wales</li> <li>• Number of nights spent and expenditure fell in 2017</li> <li>• Natural environment is a key motivator</li> <li>• Low local population to sustain year-round attraction</li> </ul> <p><b>Ferry and cruise</b></p> <ul style="list-style-type: none"> <li>• Ferry passengers tend not to stop in Pembroke Dock</li> <li>• Other ferry and cruise ports – especially Fishguard which attracts more cruise ships</li> <li>• Brexit creates uncertainty over whether both ferry ports (PD and Pembroke) will survive</li> <li>• Cruise ships coming into Pembroke Dock tend to be small, all inclusive packages</li> <li>• Many cruise passengers book their excursions in advance</li> </ul>



<ul style="list-style-type: none"> <li>○ Visiting a historic building</li> <li>○ Guided tours and storytelling</li> <li>○ Hands-on activities at a museum</li> <li>○ Outdoor art</li> <li>● Family market</li> <li>● ABC1 market strong – spending potential</li> <li>● Previous visits inform current visits</li> <li>● Visitors coming into the area for other attractors e.g. Pembroke Castle (approx. 115,000 visitors per year), Tenby</li> <li>● Majority access information online</li> <li>● Lack of wet weather options locally</li> <li>● New markets being identified for Welsh tourism might be interested in what Pembroke Dock has to offer</li> <li>● Length of stay – opportunity to promote offer to accommodation providers</li> <li>● Availability of lower cost accommodation</li> <li>● Celtic Routes – colourful town with character / gateway to castles and untamed Wales</li> <li>● Demand for interactive experiences</li> <li>● Luxury hotel guests</li> <li>● Tour operators</li> <li>● Pembrokeshire Coastal Path goes through Pembroke Dock – opportunity to differentiate e.g. on National Trails website. New Wales Coast Path marketing toolkit available soon</li> <li>● River – opportunity to appeal to market segment interested in the natural environment</li> <li>● Interest and appeal of heritage boat trips</li> </ul> <p><b>Ferry and cruise</b></p> <ul style="list-style-type: none"> <li>● Ferry and cruise passengers physically arriving in Pembroke Dock</li> <li>● Ships can dock in all weathers</li> <li>● Cruise market growing in Wales</li> <li>● Cruise passengers are starting to book their own independent tours</li> </ul>	<p><b>Pembrokeshire County Council</b></p> <ul style="list-style-type: none"> <li>● Owns key heritage assets</li> <li>● Uncertainty over tourism department</li> <li>● Pembroke Dock not seen as a priority from a tourism point of view</li> <li>● Heritage strategy focusing on Tenby Museum, Haverfordwest and Henry VII Centre in Pembroke</li> </ul> <p><b>Funding</b></p> <ul style="list-style-type: none"> <li>● Funding landscape difficult and uncertain</li> </ul>
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- Some arrive e.g. into Milford Haven without any pre-booked excursions
- Cruise passengers and especially American and Antipodean visitors interested in local heritage and ancestral links
- Milford Haven Port Authority are already working on itineraries

#### **Pembroke Dock Marine**

- Development of Port – economic and employment opportunities (creation of 650 jobs)
- Planned Marine Energy Centre of Excellence with interpretation
- Willing to preserve heritage assets where possible and interested in interpretation / development of visitor experiences
- Mitigation obligations

#### **Assets / angles**

- Appeal of the waterway (one of the deepest natural harbours in the world) and potential for 'different' boat trips
- Boat trips and possibilities for collaboration – e.g. rib owned by Port; Port in discussion with Dale Sailing Club; The Cove owns an old trip boat and would be interested in working with a social enterprise; possibility of jointly acquiring heritage vessel(s)
- Market Building and plans for food market
- Star Wars / Millennium Falcon links
- Potential development of Defensible Barracks
- Overseas connections e.g. American – Front Street Gun Tower; Japanese – Hancock's Yard; Ginko tree and links to Imperial Japanese Navy
- Master Shipwrights house – connection to Japan – new owner planning to develop two floors to appeal to Japanese tourists
- Undeveloped sites with potential e.g. Hobbs Point, Warrior Cove

#### **Potential for partnerships and collaboration**

- Core group (for this project) can to start to lead and coordinate
- Potential merger of Sunderland and Museum Trust

<ul style="list-style-type: none"> <li>• Milford Haven Port Authority</li> <li>• National Museum of the Royal Navy – has heritage records for Pembroke Dock. Likes to work with affiliates</li> <li>• Heritage Forum</li> <li>• Pembrokeshire Tourism</li> <li>• Potential to link with other locations</li> <li>• Fishguard developing boutique tours – opportunity to add</li> <li>• Guides keen to input.</li> <li>• Cadw</li> <li>• Community and youth groups e.g. Tanyard</li> <li>• Techniquist / STEM</li> </ul> <p><b>Pembrokeshire County Council</b></p> <ul style="list-style-type: none"> <li>• Regeneration team supportive</li> <li>• PCC would consider commercial proposals for properties</li> <li>• Possibility of new Destination Management Plan</li> </ul> <p><b>Facilitation of projects</b></p> <ul style="list-style-type: none"> <li>• Some funding sources available</li> <li>• Town Champion</li> <li>• Complementary projects e.g. application for grant funding through Enabling Natural Resources and Well-being in Wales which would include footpaths, aesthetic and biodiversity enhancements, potential for town trail; Active Travel Pembroke Dock bid; Green Infrastructure Action Plan including town centre greening; Local Development Plan proposals</li> </ul> <p><b>Other</b></p> <ul style="list-style-type: none"> <li>• Removal of tolls on Cleddau Bridge</li> <li>• Case study Xcel Bowl</li> </ul>	
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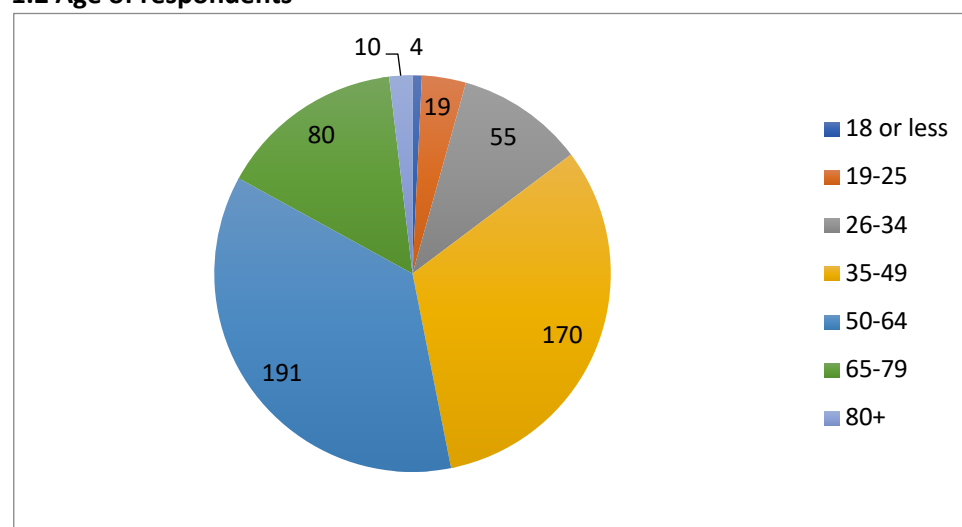
## Appendix D: Summary of survey findings

### 1. Overall statistics

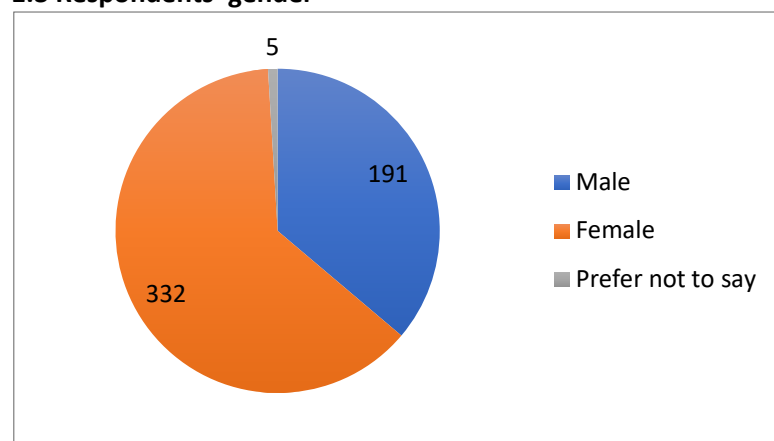
#### 1.1 Where do respondents live?

	Pembroke Dock	Surrounding area	Elsewhere in Pembrokeshire	Outside Pembrokeshire	Total
Online	178	112	38	93 (87 UK, 6 outside)	421
Face to face	10	9	4	87	110
Total	188	121	42	180	531

#### 1.2 Age of respondents



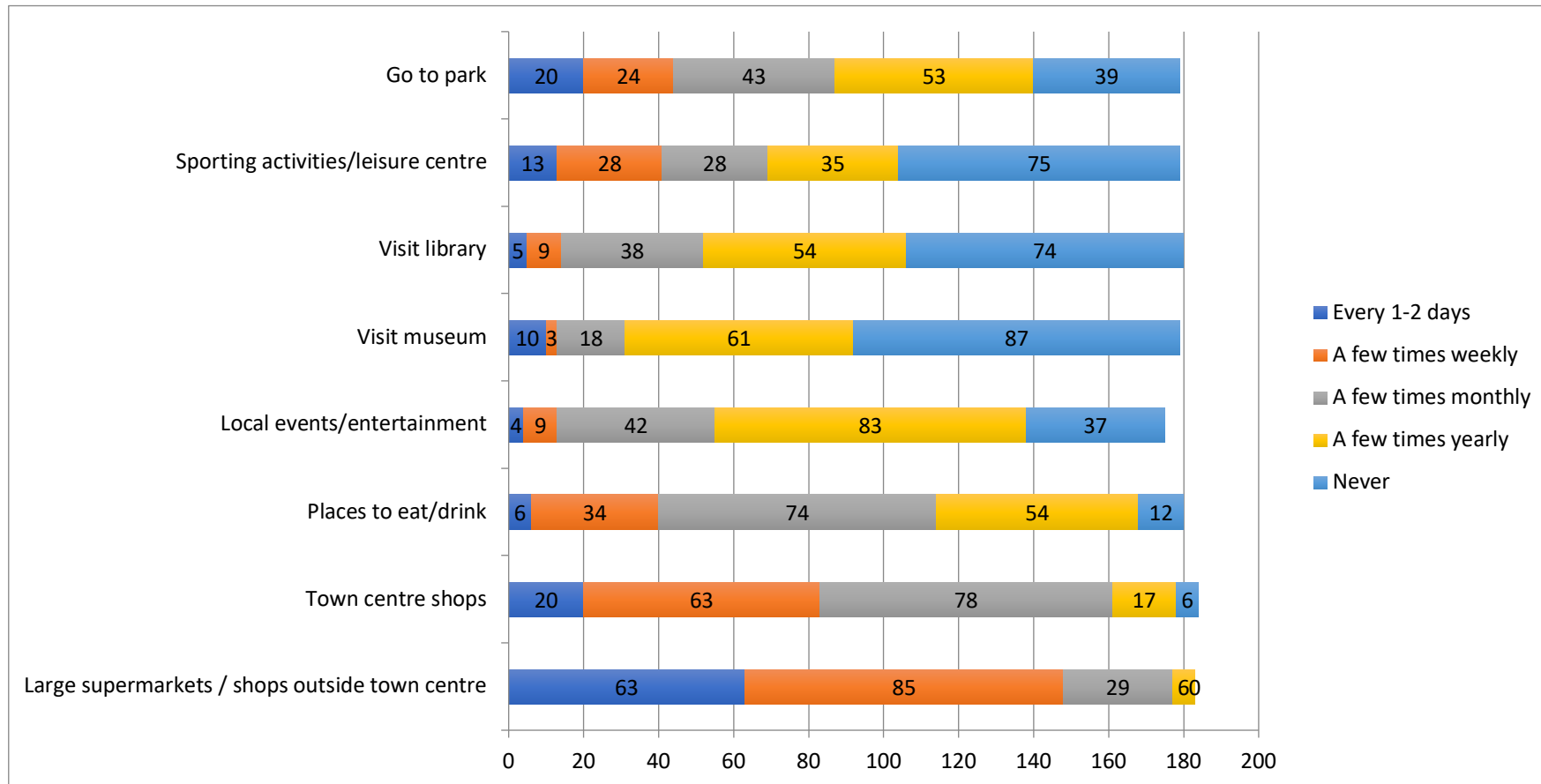
#### 1.3 Respondents' gender



## 2. Residents of Pembroke Dock

What amenities / facilities in the town do **Pembroke Dock residents** currently use, and how often?

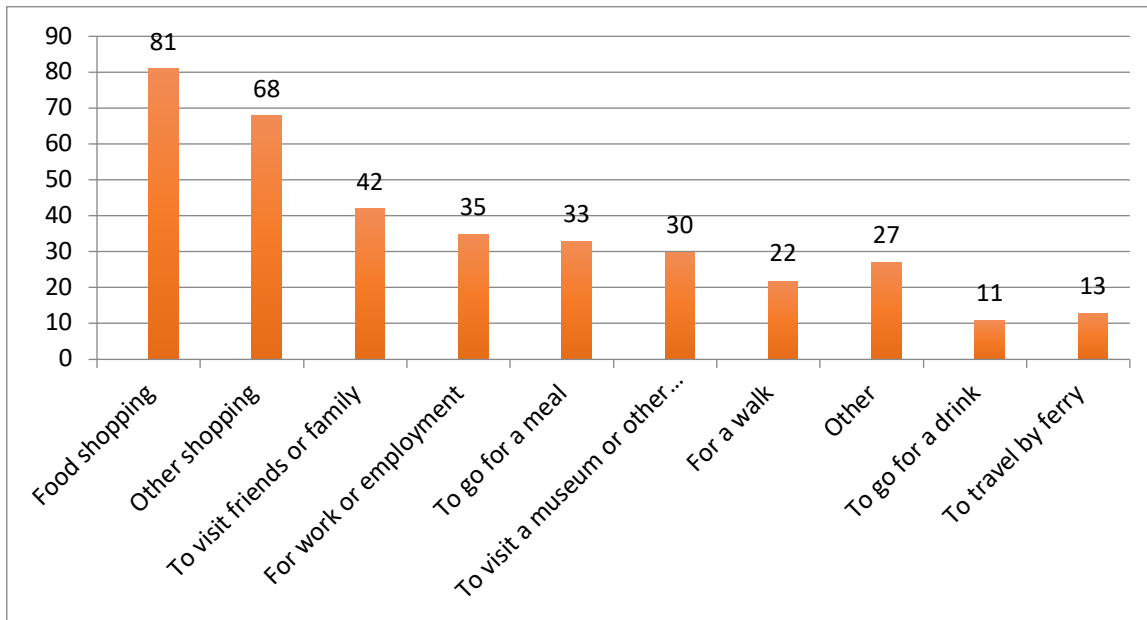
*Overall observation: Most are going in for shops, followed by places to eat and drink. Very few go in regularly for local events and entertainment, or to visit a museum. More to use facilities such as the library, sporting and leisure amenities or the park, but still not that frequently.*



### 3. Residents of surrounding area

26 (21%) visit Pembroke Dock every day and 53 (44%) a few times a week.

#### Why do they visit?

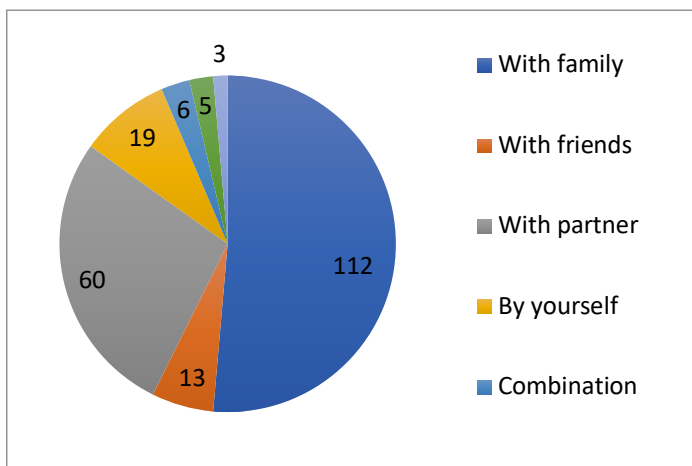


Other examples: attend meetings, school, leisure centre, park, church, band practice, Pokemon Go, family history research, use the tip, sit and enjoy views, doctor, volunteering, bowling club

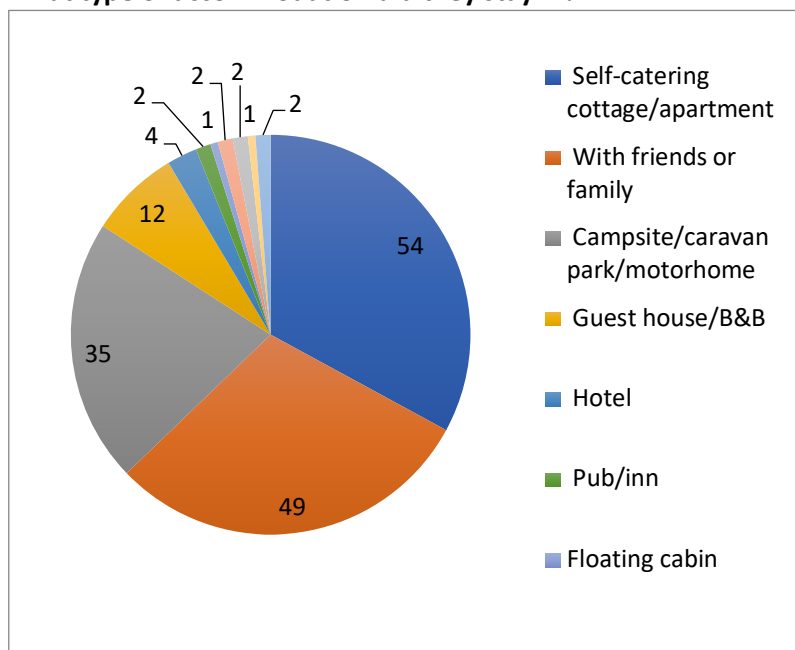
### 4. Visitors from outside Pembrokeshire

- Only one (online) respondent had not visited Pembrokeshire.
- On average, visitors from outside the area had visited Pembrokeshire 12 times during the last year, and 48 times in the previous 2-5 years.
- On this or their most recent visit to Pembrokeshire, 76% stayed overnight and 24% were on a day trip. On average, overnight visitors stayed 7 nights.

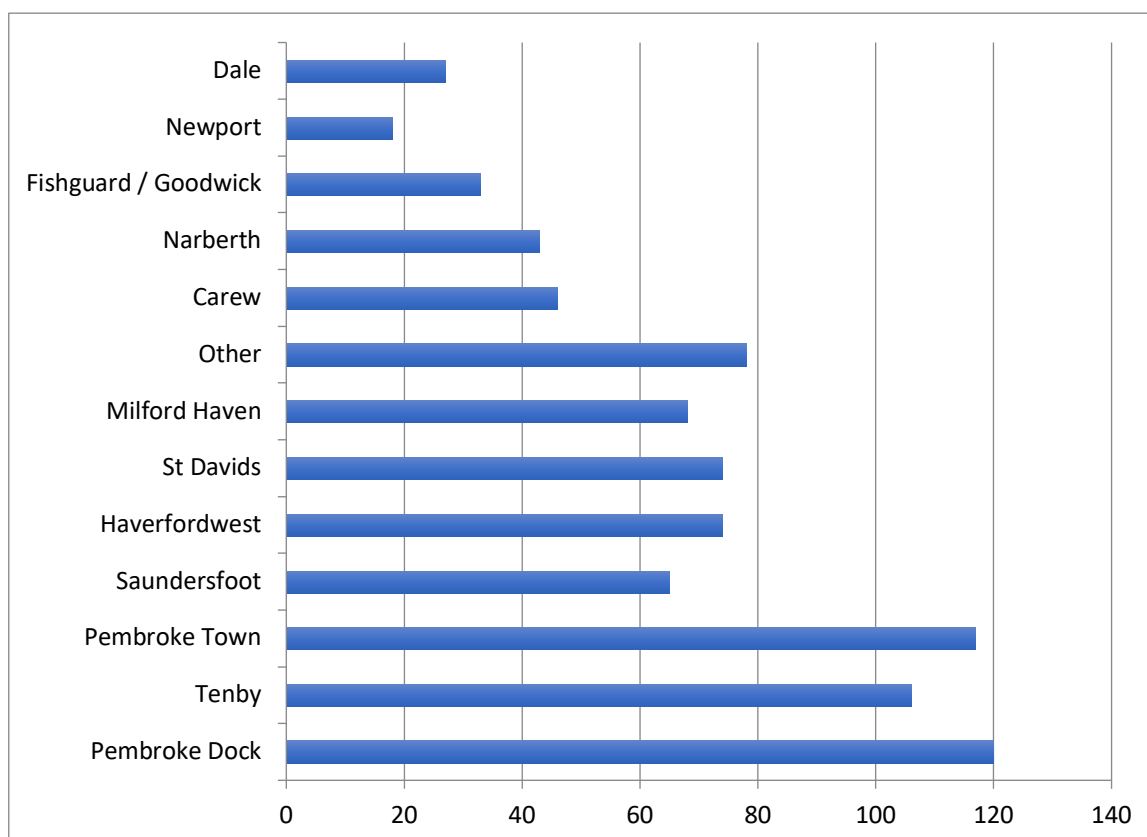
#### Who were they visiting with?



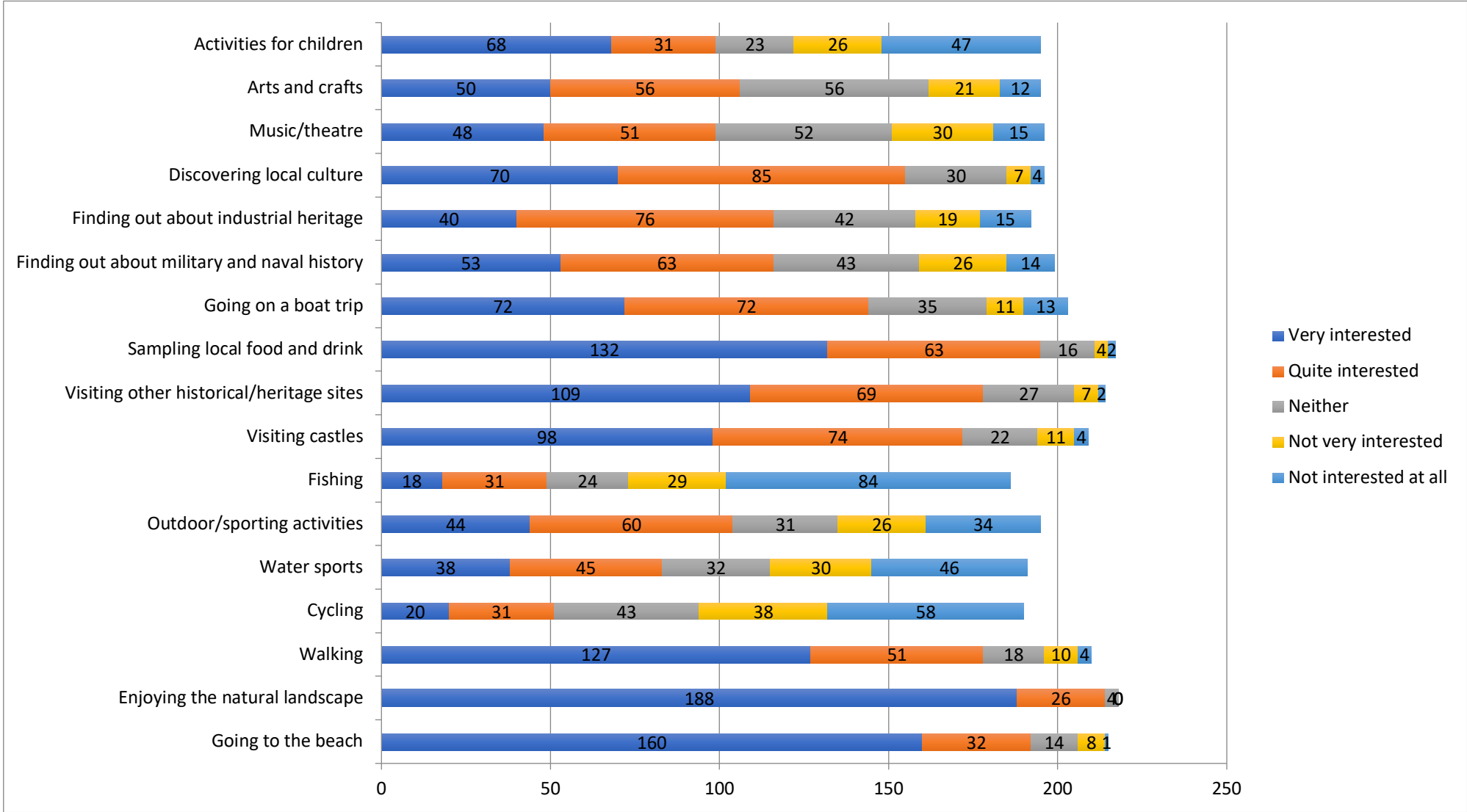
### What type of accommodation did they stay in?



### Where did they go during their trip away from home?



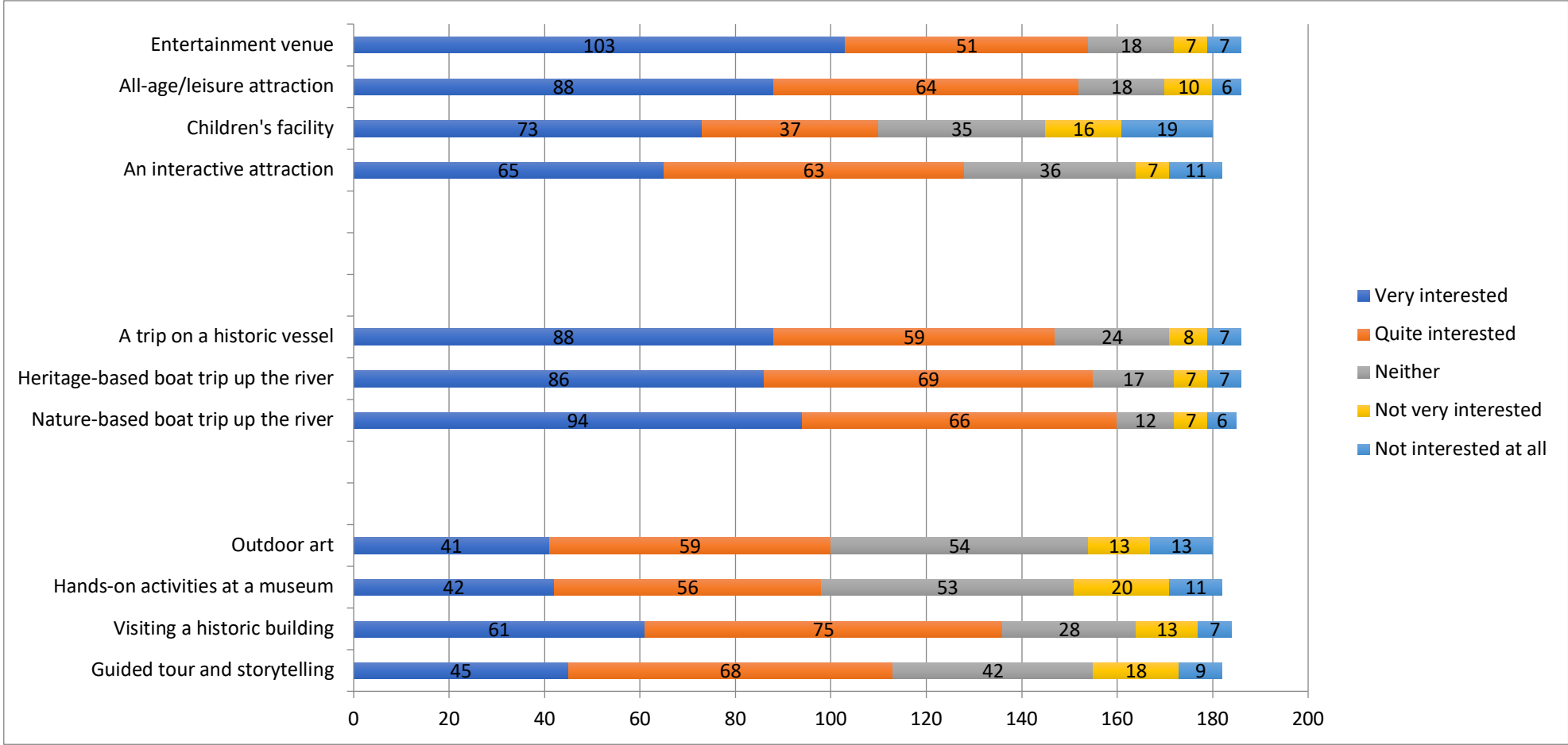
What are they / would they be most interested in doing when on holiday/a day out in Pembrokeshire?



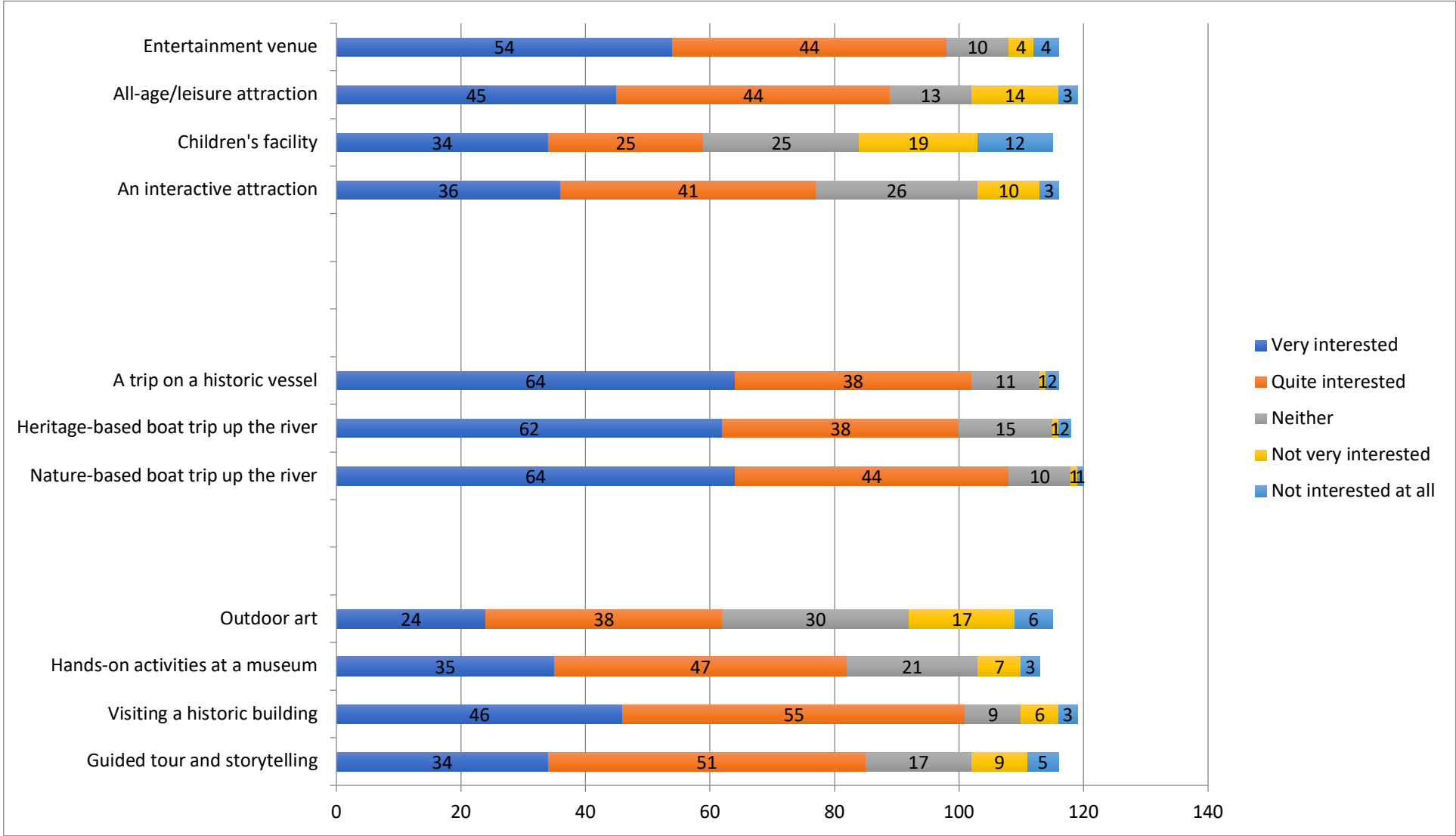


5. All respondents were asked how interested they would be in a number of different facilities / attractions / activities. Each group responded differently, illustrated in the next three charts:

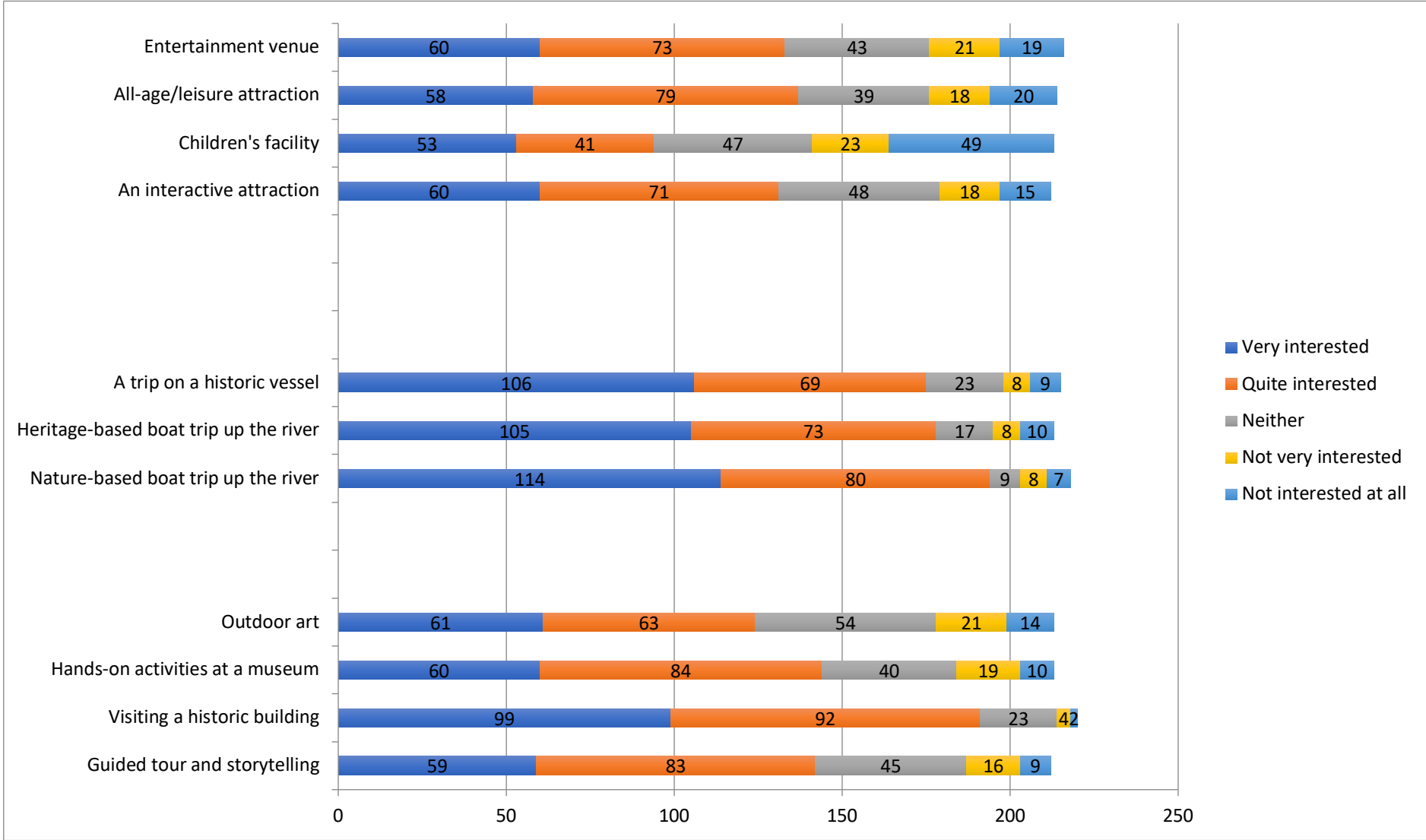
5.1 Residents of Pembroke Dock



5.2 Residents of surrounding area



5.3 Visitors from elsewhere



## 6. What's missing?

Residents of Pembroke Dock and surrounding area were asked whether there were any facilities, activities or attractions they feel are missing in Pembroke Dock – i.e. things that would make them and/or their family spend more time in the town itself. Visitors were also asked the same question – if they knew the town. Common responses included:

- Indoor entertainment: cinema, bowling, climbing wall, skating, trampolines, interactive e.g. escape room, Techniquet type venue, casino, gaming
- Music: events, outdoor, venue
- Theatre
- Events and festivals
- Food – better variety, quality, local, markets
- Art: including outdoor art / sculpture
- Tourist information: visitor centre, guidance, signage, interpretation
- Indoor and outdoor amenities for children (of all ages, including older teens)
- Facilities for older and disabled people
- Dog friendly venues
- Improvements to the town and its facilities – including the centre, waterfront, Hobbs Point
- More shops – small independent / chain
- Celebrate history, natural environment, the water, offer trails and walks

Visitors were also asked whether there are any facilities, activities or attractions they feel are missing in the county of Pembrokeshire. Many of these responses echoed those to the previous question; there were also a notable number of respondents saying that they were happy with everything available and that one thing they like is the unspoilt natural environment.

## Appendix E: Options appraisal overview

	Project	Pros (for this project)	Cons (for this project)	Options appraisal conclusions	Potential to contribute to project objectives (as a <i>standalone</i> option)	Feasibility for social enterprise (low / medium / high)
<b>SITES / POTENTIAL ATTRACTIONS</b>	1. Acquisition and development of Front Street Gun Tower	<ul style="list-style-type: none"> <li>• An iconic building, central to the town's story</li> <li>• Survey showed a keen interest in heritage buildings</li> <li>• Well located between the Heritage Centre and Hancock's Yard</li> <li>• Potential for variety of uses e.g. retail / food and drink / heritage interpretation / viewpoint</li> </ul>	<ul style="list-style-type: none"> <li>• Ownership</li> <li>• Current management not in a position to take forward</li> <li>• Resource intensive</li> <li>• Cost of purchase, renovation, repairs and maintenance</li> <li>• Some uses would be seasonal</li> </ul>	<ul style="list-style-type: none"> <li>• Iconic heritage site for Pembroke Dock with potential to draw people if public access available</li> <li>• Requires strong leadership and funding</li> <li>• Collaboration required to take forward as a social enterprise</li> <li>• Challenging in the shorter term but longer term could fit into a wider Pembroke Dock offer</li> </ul>	B, C, D, E	Low to medium
	2. Development of Hancock's Yard as a 'hands-on' attraction	<ul style="list-style-type: none"> <li>• Survey showed interest in hands on activities</li> <li>• Heritage vessels appeal</li> <li>• Possible departure / stopping point for boat trips</li> <li>• Community run</li> <li>• Variety of activities</li> <li>• Runs tours</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of resources to develop site</li> <li>• People / volunteers to run activities</li> <li>• Needs clear vision and identity</li> <li>• Buildings not iconic enough to drive people to Pembroke Dock</li> </ul>	<ul style="list-style-type: none"> <li>• Need to develop clear vision and identity</li> <li>• Potential hub for tours</li> <li>• Increase hands on activities</li> <li>• Potential to collaborate with other partners</li> <li>• Would benefit from collaboration as part of wider Pembroke Dock offer</li> </ul>	B, C, D, E	High

		<ul style="list-style-type: none"> <li>• Maintaining traditional skills</li> <li>• Location, parking</li> <li>• Flexibility of space</li> </ul>	<ul style="list-style-type: none"> <li>• Difficult for boats to access at low tide</li> </ul>			
	3. Pembroke Dock Heritage Centre	<ul style="list-style-type: none"> <li>• Already established</li> <li>• Survey showed interest in historic buildings</li> <li>• Location</li> <li>• Parking</li> </ul>	<ul style="list-style-type: none"> <li>• Ownership / lease</li> <li>• Limited space for further development</li> <li>• Needs greater clarity on identity</li> </ul>	<ul style="list-style-type: none"> <li>• Need to develop clear vision and identity</li> <li>• Potential to increase focus on unique story of Sunderland flying boats</li> <li>• Potential to collaborate with other partners</li> <li>• Would benefit from collaboration as part of wider Pembroke Dock offer</li> </ul>	B, C, D, E	Medium
	4. Development of Dockyard heritage assets (including Graving Dock and Pickling Pond – see Appendix A)	<ul style="list-style-type: none"> <li>• Unique assets, of particular interest to visitors with an interest in maritime history</li> </ul>	<ul style="list-style-type: none"> <li>• Ownership</li> <li>• Location</li> <li>• Commercial viability</li> <li>• Relatively narrow appeal</li> </ul>	<ul style="list-style-type: none"> <li>• Unlikely to attract many visitors as a stand-alone attraction – better as part of a wider offer / tour</li> </ul>	C, D	Low
	5. Defensible Barracks	<ul style="list-style-type: none"> <li>• Location</li> <li>• Potential for accommodation – iconic hotel</li> <li>• Potential for events and functions</li> <li>• Survey showed interest in historic buildings</li> </ul>	<ul style="list-style-type: none"> <li>• Large scale</li> <li>• High investment and cost of renovation and maintenance</li> </ul>	<ul style="list-style-type: none"> <li>• Could add significant value to the offer in Pembroke Dock as e.g. boutique hotel / self catering apartments / events venue, but requires large scale private investor</li> <li>• Investors could be encouraged by collaborative approach to tours and marketing</li> </ul>	A, B, C, D	Low

	6. Indoor leisure attraction / entertainment venue	<ul style="list-style-type: none"> <li>• Strong interest from residents of the town and surrounding area, in a leisure attraction – especially a cinema</li> <li>• Potential for year round opening, employment etc</li> <li>• Wet weather option for visitors</li> <li>• Clear gap in the market for indoor attraction for all age groups</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of acquisition and development</li> <li>• Commercial risks of operation</li> </ul>	<ul style="list-style-type: none"> <li>• Focus on identifying suitable premises, preparing a prospectus to demonstrate its appeal and potential and for prospective investor(s) to conduct an in-depth feasibility study for their proposed use(s)</li> </ul>	B	Low
	7. Innovative 'green energy' based visitor centre / attraction	<ul style="list-style-type: none"> <li>• Would offer something new and distinctive, different from wider Pembrokeshire offer</li> <li>• Build on contemporary Pembroke Dock story</li> </ul>	<ul style="list-style-type: none"> <li>• High investment; high risk</li> <li>• Needs support of Pembroke Dock green energy businesses, Port and others</li> </ul>	<ul style="list-style-type: none"> <li>• Support any development of interpretation / visitor centre by other stakeholders e.g. Port, Pembrokeshire Coastal Forum</li> </ul>	B, E	Low
	8. Attraction based on Star Wars / Millennium Falcon story	<ul style="list-style-type: none"> <li>• Strong story unique to Pembroke Dock</li> <li>• Recognisable and popular 'brand'</li> </ul>	<ul style="list-style-type: none"> <li>• Ownership (Port)</li> <li>• High investment required</li> <li>• Licensing</li> </ul>	<ul style="list-style-type: none"> <li>• Millennium Falcon story should be interpreted and told through tours and other storytelling</li> <li>• Private sector option to develop as an attraction</li> </ul>	B, C	Low
	9. Development of the Commodore building	<ul style="list-style-type: none"> <li>• Could be a suitable venue for renewable energy interpretation centre or community arts centre</li> <li>• Location</li> </ul>	<ul style="list-style-type: none"> <li>• Ownership</li> <li>• Cost of restoration and maintenance</li> <li>• Community arts use would be more focused on local residents than visitors</li> </ul>	<ul style="list-style-type: none"> <li>• Could contribute to wider offer in Pembroke Dock</li> </ul>	B, C, D, E	Medium

		<ul style="list-style-type: none"> <li>Attractive building, part of Pembroke Dock's heritage</li> </ul>				
	10. Development of Hobbs Point	<ul style="list-style-type: none"> <li>Location by the water</li> <li>Boat trips</li> <li>Viewpoint and boat spotting</li> <li>Events</li> <li>Potential for catering facility</li> <li>Deep water jetty</li> </ul>	<ul style="list-style-type: none"> <li>Ownership</li> <li>Not well located to drive people into town</li> <li>Unattractive approach</li> </ul>	<ul style="list-style-type: none"> <li>Potential useful location for future shore front activities</li> </ul>	B, C	Medium
	11. Mooring facility / centre for tall ships and heritage vessels	<ul style="list-style-type: none"> <li>Reported demand for overwintering</li> <li>Could provide a source of historic vessels for trips</li> </ul>	<ul style="list-style-type: none"> <li>Cost of investment</li> <li>Acquisition of site</li> </ul>	<ul style="list-style-type: none"> <li>Potential enterprise for suitable investor that could add value to overall offer</li> </ul>	B	Low
<b>ACTIVITIES</b>	12. Water sports and activities	<ul style="list-style-type: none"> <li>The river is a natural asset, which has potential for greater use</li> <li>Facilities already exist at Llanion Cove</li> <li>Educational market</li> <li>Offers outdoor activities on the water</li> <li>Good facilities already exist</li> </ul>	<ul style="list-style-type: none"> <li>Based by the river therefore (by itself) won't necessary drive more people into the town itself</li> <li>Cost and resources to develop</li> <li>Local competitors</li> </ul>	<ul style="list-style-type: none"> <li>Already being developed and therefore could benefit from a wider offer</li> <li>Could form part of a tour or day itinerary</li> </ul>	B, E	Medium
	13. Boat trips	<ul style="list-style-type: none"> <li>Surveys showed strong interest in boat trips by residents and visitors</li> <li>Possible to develop different themes e.g.</li> </ul>	<ul style="list-style-type: none"> <li>Seasonal</li> <li>Investment required</li> <li>Local competitors</li> </ul>	<ul style="list-style-type: none"> <li>Scope for development – need to focus on differentiation of river experience v coast</li> <li>Could be combined with walking tours</li> </ul>	B, C, E	Medium



		birdlife, river trips, military history	<ul style="list-style-type: none"> <li>Difficulties in accessing river / launch points</li> </ul>	<ul style="list-style-type: none"> <li>Would benefit from wider destination promotion</li> </ul>		
	14. Tours, using local ambassadors and training guides	<ul style="list-style-type: none"> <li>Existing tours</li> <li>Untapped knowledge of Pembroke Dock history</li> <li>Surveys showed interest in learning more about Pembroke Dock through tours and storytelling</li> <li>Wales Tour Guides Association guides are supportive, excited by Pembroke Dock story</li> <li>Fishguard Bay Welcome a good model</li> <li>Low investment required</li> <li>Existing low cost channels to market e.g. Tripadvisor, Viator, Airbnb Experiences</li> <li>Could be combined with home hosting</li> <li>Could be combined with other services e.g. food and drink, local events, entertainment</li> <li>Keeps spend local</li> <li>Good way to promote Pembroke Dock's existing offer</li> </ul>	<ul style="list-style-type: none"> <li>Seasonal</li> <li>Low visitor numbers to purchase tours on site</li> <li>Lack of marketing of current tours</li> </ul>	<ul style="list-style-type: none"> <li>High potential to involve wide group of people and promote Pembroke Dock as a destination</li> <li>Fulfills project objectives</li> <li>Developing and marketing tours together would be a 'quick win' to encourage greater collaboration in the destination</li> </ul>	A, B, C, D, E	High

		<ul style="list-style-type: none"> <li>• Good way to collate stories</li> <li>• Good way to develop local pride</li> <li>• Flexible – can incorporate new assets and enterprises as they are developed</li> <li>• Can direct visitors through town and encourage them to stay longer</li> <li>• Can link up heritage assets</li> <li>• Can be marketed to a variety of special interest groups e.g. general cultural heritage, specialist heritage, families, ferry passengers, cruise, educational</li> <li>• Can showcase local culture</li> <li>• Can directly involve local people</li> </ul>				
<b>SERVICES</b>	15. Develop food based offer	<ul style="list-style-type: none"> <li>• New, popular, food initiative established</li> <li>• Survey respondents were interested in sampling local food</li> </ul>	<ul style="list-style-type: none"> <li>• Seasonal to some extent</li> </ul>	<ul style="list-style-type: none"> <li>• A food offer is already being well developed by others and others – needs strong support and promotion</li> <li>• Better to create a supportive environment in which this can thrive</li> </ul>	A, B, C	Low to medium

		<ul style="list-style-type: none"> <li>• Potential to attract visitors and get ferry passengers to stop</li> <li>• Good local produce</li> <li>• Strong local supply chain – could be scope for further initiatives in future</li> <li>• Would compliment tours</li> <li>• Could tie in with events</li> </ul>				
<b>DESTINATION MANAGEMENT AND MARKETING</b>	16. Place-making project to develop a cohesive story of Pembroke Dock	<ul style="list-style-type: none"> <li>• Pembroke Dock needs a clear identity</li> <li>• Exceptionally rich past and contemporary story needs collating, creative interpretation and marketing</li> <li>• Would develop local pride</li> <li>• Survey respondents interested in storytelling</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of formal place-making study</li> <li>• Lack of current structure to deliver recommendations</li> <li>• Lack of funding</li> </ul>	<ul style="list-style-type: none"> <li>• Essential for maximising the value of Pembroke Dock's heritage, creating and promoting a unified story and developing local pride</li> <li>• Needed to underpin branding and marketing of the destination and development of tours and attractions</li> <li>• Current fragmented approach to development and promotion of Pembroke Dock is diminishing its opportunities to attract visitors</li> </ul>	A, B, C, D, E	N/A
	17a. Collaborative destination management structure required to work together within Pembroke Dock and more widely	<ul style="list-style-type: none"> <li>• Gives confidence to potential funders and investors</li> <li>• Enables everyone to play their part</li> <li>• Provides a vehicle for developing future projects</li> </ul>	<ul style="list-style-type: none"> <li>• Needs coordination</li> <li>• Currently a number of different interest groups</li> <li>• Needs clear commitment from stakeholders</li> <li>• Ongoing funding is a long term challenge</li> </ul>	<ul style="list-style-type: none"> <li>• Collaboration, decision making processes and leadership essential for developing a successful and cohesive destination</li> </ul>	A, B, C, D, E	High

		<ul style="list-style-type: none"> <li>Funding for Town Champion</li> </ul>				
	17b. Website, visitor information and signage	<ul style="list-style-type: none"> <li>Essential for cohesive destination marketing</li> <li>Discover Pembroke Dock website already set up</li> <li>Effective signposting for locals and visitors to what is available to see and do</li> <li>Potential income generator through bookings e.g. for tours, accommodation</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing cost</li> <li>Time and resources to develop</li> <li>Needs others to provide information</li> </ul>	<ul style="list-style-type: none"> <li>Build on existing <a href="http://www.discoverpembrokedock.co.uk">www.discoverpembrokedock.co.uk</a> to populate the site with relevant content</li> <li>Ensure effective SEO</li> <li>Use to build up stories of Pembroke Dock and create content for tours</li> </ul>		
	17c. Interpretation	<ul style="list-style-type: none"> <li>Brings the story of Pembroke Dock to life</li> <li>Training local stakeholders to be Pembroke Dock Ambassadors develops local pride</li> <li>Visitors are interested in storytelling</li> </ul>	<ul style="list-style-type: none"> <li>Time and resources</li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>		
	17d. Local arts based project to create a 'colourful town' e.g. paint all the local buildings with heritage stories / bring the heritage stories to life in town	<ul style="list-style-type: none"> <li>Could make Pembroke Dock a colourful and distinctive 'selfie' attraction, and differentiate it from the surrounding tourism offer based on nature, beaches, castles etc</li> </ul>	<ul style="list-style-type: none"> <li>Requires organisation and collaboration, for which there are not yet the resources / coordinating body</li> </ul>	<ul style="list-style-type: none"> <li>Needs to be preceded by place making to identify unified Pembroke Dock story</li> </ul>		

		<ul style="list-style-type: none"> <li>• Could fit with Celtic Routes project and creation / promotion of 'colourful towns'</li> </ul>				
	17e. Events strategy	<ul style="list-style-type: none"> <li>• Builds on existing events e.g. Seafair Haven, Bungee off the Bridge</li> <li>• Local expertise and experience in developing events</li> <li>• Opportunity to link to the story of Pembroke Dock / build on placemaking</li> <li>• Events in low season could boost visitor numbers</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of current cohesive destination marketing limits potential to use events to attract visitors</li> <li>• Lack of current coordination for existing events</li> </ul>	<ul style="list-style-type: none"> <li>• Events strategy needed to identify cohesive range of events to appeal to different market interests or focus on a specific theme, as well as potential year round activities</li> </ul>		

## Appendix F: Potential funding sources

Particular sources of funding which may be relevant to the development of these two projects are listed below. In addition, the following can be used for specific searches:

- Business Wales – Finance Locator: <https://businesswales.gov.wales/businessfinance/finance-locator>
- Funding Wales: a funding search platform created by Third Sector Support Wales: [www.funding.cymru](http://www.funding.cymru)

Finance Schemes:

Development Bank Wales operates a loan scheme through its Wales Business Fund: <https://developmentbank.wales/wales-business-fund?lang=en-gb>

WCVA Social Investment Cymru also offers finance schemes for social enterprises in Wales: <https://www.wcva.org.uk/funding/social-investment-cymru>

Funding source	Amount available	Criteria	Website / contact details if available
<b>Welsh Government Micro and Small Business Fund (MSBF) - Re-opened for applications until 2021</b>	£25,000 – 500,000	Micro to small size businesses with fewer than 50 FTE employees. Investment fund targeting eligible capital investment projects in tourism sector in Wales. Can be used either to upgrade existing or create new high quality product. Support to: <ul style="list-style-type: none"> <li>♦ Create and safeguard jobs</li> <li>♦ Realise economic benefit and growth</li> <li>♦ Deliver quality, innovation and a sense of place.</li> </ul>	<a href="https://businesswales.gov.wales/tourism/finance#guide-tabs--2">https://businesswales.gov.wales/tourism/finance#guide-tabs--2</a> tourism.industryadvice@gov.wales 0845 010 8020
<b>National Lottery Heritage Fund</b>	£3,000 – 10,000 £10,000 – 100,000 £100,000 – 250,000 £250,000 – 5 million £5 million+	Fund heritage projects including oral history and cultural traditions, e.g. storytelling as well as historic buildings. Fund activities, repairs and conservation, digital outputs, new staff posts, paid training placements, professional fees	<a href="https://www.heritagefund.org.uk/funding">https://www.heritagefund.org.uk/funding</a>
<b>National Lottery Community Fund - People &amp; Places</b>	Small grants: £300 - £10,000  Medium grants: £10,001 – 100,000  Large grants: £100,001 - £500,000 for projects	Funding for projects where people and communities are working together and using their strengths to make positive impacts on the things that matter to them the most. The community must have been involved in the design, development, and running of the project.  For voluntary or community groups such as a charity, co-operative, social enterprise or community interest company, a not-for-profit company limited by guarantee, or a statutory organisation such as a local authority or school.	<a href="https://www.biglotteryfund.org.uk/funding/programmes/people-and-places-large-grants">https://www.biglotteryfund.org.uk/funding/programmes/people-and-places-large-grants</a> wales@biglotteryfund.org.uk  emailing wales@tnlcommunityfund.org.uk or calling 0300 123 0735

	that run from one to five years	<p>Partnerships are also welcome to apply as long as the lead applicant is a voluntary or community organisation, or a social enterprise (VCSE).</p> <p>Funding for: Some or all costs including staff salaries, training, volunteer expenses, management costs, equipment, premises costs, monitoring and evaluation, and overheads. Capital work, such as a new building, refurbishment, the purchase of land or buildings and vehicles, as part of a wider project. If the project involves land or buildings, a grant of up to £50,000 can be applied for to help develop capital plans (Capital Development Grant).</p>	
<b>Architectural Heritage Fund</b>	<p>Offers two types of project seed-funding:</p> <ul style="list-style-type: none"> <li>• Project Viability Grants (up to £7,500)</li> <li>• Project Development Grants (up to £30,000).</li> </ul>	<p>4 funding objectives:</p> <ol style="list-style-type: none"> <li>1. To support people, communities and organisations to take ownership, to repair and to adapt historic buildings and places for new sustainable uses.</li> <li>2. To attract more investment for the conservation and sustainable re-use of the UK's architectural heritage.</li> <li>3. To inspire the start up and growth of new community enterprises that utilise historic buildings and places for public benefit.</li> <li>4. To demonstrate the value of a well-managed historic built environment by championing and showcasing the impact of the projects we have supported.</li> </ol> <p>All applications must concern projects that have recently involved or will result in a change of ownership and/or a change of use. The development work should enable measurable progress towards the goal of acquiring an historic building and/or adapting it for a new use. Grants are for project development costs only and not for on-site capital works.</p> <p>Projects are assessed in relation to priority categories: Heritage need; Social impact; 'Why now' (i.e. urgency) and Financial need.</p> <p>Applicants must be a formally constituted charity or social enterprise whose members have limited liability.</p>	<p><a href="http://www.ahfund.org.uk/grants">www.ahfund.org.uk/grants</a>  <a href="http://ahfund.org.uk/wales">http://ahfund.org.uk/wales</a></p>

<b>Cadw Historic Buildings grants</b>	Normally funds costs of up to 50% of grant eligible works up to a maximum of £50,000; but considered on case by case basis	Offers grants towards the cost of repairing and restoring historic community assets, with a focus on repair schemes which will help give a new lease of life to listed buildings that are at risk and which will deliver benefits to Welsh communities, e.g. through skills development, training, and access opportunities.	<a href="https://cadw.gov.wales/advice-support/historic-assets/listed-buildings/historic-buildings-grant">https://cadw.gov.wales/advice-support/historic-assets/listed-buildings/historic-buildings-grant</a>
<b>Arwain Sir Benfro LEADER Programme</b>	Financial support of up to 70% of the total project costs – revenue not capital costs. No maximum funding levels. Match funding of at least 30% of the total project costs must be found from other sources – either cash or in kind contributions from public, private or third sectors.	Financial assistance available to local people, business and communities to support the regeneration of rural Pembrokeshire through innovative projects that facilitate, investigate, identify, test and pilot new ways of addressing the priorities listed within the 5 LEADER themes: <ul style="list-style-type: none"> <li>• Adding value to local identity and natural and cultural resources.</li> <li>• Facilitating pre-commercial development, business partnerships and short supply chains.</li> <li>• Exploring new ways of providing non-statutory local services.</li> <li>• Renewable energy at community level.</li> <li>• Exploitation of digital technology.</li> </ul> Projects must make a contribution towards jobs and growth and should contribute towards tackling poverty in the rural area.	<a href="https://www.arwainsirbenfro.cymru">https://www.arwainsirbenfro.cymru</a>
<b>PCNPA Sustainable Development Fund, administered by PLANED</b>	Offers finance of up to 50% of project costs (or 75% for community groups).	Supports innovative sustainable projects that develop and test new ways of achieving a more sustainable living for current and future generations. The funding is to support projects that focus on demonstrating practical solutions relevant to environmental, social, cultural and economic aspects of life.  Successful projects should achieve one or more of the following: <ul style="list-style-type: none"> <li>• protect and enhance the environment and wildlife</li> <li>• use natural resources carefully</li> <li>• improve understanding and awareness of sustainable living</li> <li>• recognise the need of all people</li> <li>• contribute to resilient vibrant communities</li> <li>• provide opportunities for local employment and economic growth</li> <li>• preserve local culture and heritage</li> </ul>	<a href="http://www.pembrokeshirecoast.wales/sdf">www.pembrokeshirecoast.wales/sdf</a> 01646 624800 (ask for the SDF Administrator) <a href="mailto:sdf@pembrokeshirecoast.org.uk">sdf@pembrokeshirecoast.org.uk</a> <a href="https://www.pembrokeshirecoast.wales/default.asp?PID=167">https://www.pembrokeshirecoast.wales/default.asp?PID=167</a>



		<ul style="list-style-type: none"> <li>realise health benefits afforded by outdoor access and recreation</li> </ul> <p>The scheme will provide project grants, management grants (to support staff costs) and development grants (to provide a catalyst for new action or partnerships).</p> <p>Little Green Grant funding of up to £1,500 also available, with priority for projects addressing the impacts of climate change</p>	
<b>Milford Haven Port Authority Community Fund</b>	Up to £499 £500+	Offers support to charities, voluntary organisations, community organisations and social enterprises working within Pembrokeshire	<a href="https://www.mhpa.co.uk/community-fund/">https://www.mhpa.co.uk/community-fund/</a>
<b>PCC Enhancing Pembrokeshire Grant</b>		<p>Funding for new projects that help address the negative impact of second homes and in doing so adds value to our communities. Outcomes are structured around five Well-being objectives:</p> <ul style="list-style-type: none"> <li>Raising overall standards of achievement</li> <li>Healthy communities: Communities supported by affordable and appropriate housing; improving social care</li> <li>Increase the economy's productivity and address regeneration issues</li> <li>Safeguarding our environment</li> <li>Self-sustained and vibrant communities</li> </ul>	<a href="https://www.pembrokeshire.gov.uk/grants">https://www.pembrokeshire.gov.uk/grants</a>
<b>Bluestone Foundation Community Fund (delivered by PAVS)</b>	£500 – 2,500	<p>Offers funding to:</p> <ul style="list-style-type: none"> <li>Economic projects that will foster entrepreneurialism and enhance prospects for employment and development</li> <li>Projects which raise environmental awareness through education and a volunteer programme</li> <li>Social projects which address the effects of deprivation and poverty, with particular emphasis on youth</li> </ul> <p>Organisations demonstrating that they are prepared to help themselves will be prioritised.</p>	<a href="https://www.bluestonewales.com/bluestone-foundation">https://www.bluestonewales.com/bluestone-foundation</a>
<b>South Hook LNG</b>	Not specified	<p>Aims to support projects / initiatives that:</p> <ul style="list-style-type: none"> <li>Support communities in Pembrokeshire</li> <li>Support the areas of safety, environment, education and wellbeing</li> </ul>	Via PAVS: 01437 769 422 / <a href="mailto:development@pavs.org.uk">development@pavs.org.uk</a>

<b>Community Fund</b>		<ul style="list-style-type: none"> <li>• Have a long-term sustainable benefit for the community</li> <li>• Demonstrate an element of match funding (pooled resources, shared use of premises, reuse/recycle where appropriate)</li> <li>• Encourage community volunteering</li> </ul>	
<b>Foyle Foundation Small Grants Scheme</b>	£1,000 – 10,000	For smaller charities, especially those working at grass roots and local community level, in any field, across a wide range of activities and with an annual turnover of less than £150,000. One-year grants for core costs, equipment, capital or project funding to charities which can show that such a grant will make a significant difference to their work.	<a href="http://www.foylefoundation.org.uk/small-grants-scheme/">http://www.foylefoundation.org.uk/small-grants-scheme/</a>
<b>Tudor Trust</b>	£10,000+	Independent grant-making charitable trust. funding organisations working to support positive changes in people's lives and in their communities around the UK.	<a href="http://www.tudortrust.org.uk">www.tudortrust.org.uk</a>
<b>Trusthouse Charitable Foundation</b>	<p>Small grants: One-off grants between £2,000 and £7,500 for core costs, salaries, project costs or capital costs</p> <p>Major grants: Grants of up to £20,000 a year for up to three years for core costs, salaries, project costs Grants of up to £60,000 for one-off capital costs for projects with a total cost of up to £2 million</p>	<p>Open to any charitable, not-for-profit and voluntary organisation in the UK with a total annual income under £250,000 (for small grants) or £500,000 for major grants</p> <p>Focus on supporting local organisations in the most deprived rural and urban communities.</p> <p>Applications invited from organisations whose work falls under the general heading of Community Support and Arts Education Heritage</p>	<a href="http://trusthousecharitablefoundation.org.uk">http://trusthousecharitablefoundation.org.uk</a>