

**REPORT OF THE DIRECTOR OF COUNTRYSIDE, COMMUNITY AND VISITOR SERVICES**

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**SUBJECT: THE IMPACT OF COVID-19 ON VISITOR SERVICES**

Purpose of Report

To update Members on the operational challenges caused by COVID-19 across the Park Authority's visitor attractions (i.e. Oriel y Parc, Carew Castle and Castell Henllys) during the main 2020 season.

Introduction

The Park Authority's visitor attractions form the 'backbone' of PCNPA's engagement with visitors throughout the year but especially during the peak season (i.e. from March to October). The three sites usually welcome over 150,000 visitors during the peak season but the impact of COVID-19 has had significant impacts on the Authority's Visitor Services both in terms of a major drop in visitor numbers and the subsequent impact on income.

The report focusses on the main challenges facing the Authority as the Visitor Services team continue to manage our sites under the current constraints and draws attention to some of the setbacks encountered whilst also highlighting the collective work undertaken to date in order to support PCNPA's visitor operations and, in turn, the wider visitor economy at such a difficult time.

Background

COVID-19 spread to the United Kingdom in late January 2020. On the 11<sup>th</sup> March the outbreak was declared a pandemic. On the 20<sup>th</sup> March restaurants, schools, pubs, indoor entertainment venues leisure centres etc. were closed nationwide (including PCNPA's visitor attractions), and on 23<sup>rd</sup> March a "lockdown" was imposed, banning all "non-essential" travel and contact with people outside the home and shutting many businesses, venues, facilities, amenities and places of worship.

In response to the significant legal restrictions introduced and the developing outbreak, much of the Park Authority's regular functions were stopped with all PCNPA buildings closed and staff supported to work from home wherever possible. This included virtually all of the Visitor Services team(s) who initially worked from home but who were ultimately furloughed (either fully or partially) until the visitor attractions sites were re-opened in July.

Re-opening the Authority's visitor sites was a mammoth operation involving undertaking rapid physical adaptations to the sites to make them safe for visitors and staff, a comprehensive review and update of all associated health and safety policies and procedures, the launch of a new online booking system for visitors in order to limit numbers at sites and to assist with Welsh Government's Track, Trace and

Protect (TTP) service as well as intensive training and ‘re-orientation’ for staff in readiness for radically different ways of working.

The challenges, as well as opportunities, are highlighted in more detail within the main body of the report but early recognition should be given to staff across the Visitor Services team for their resilience, adaptability and ingenuity in working collectively to welcome visitors back to Pembrokeshire and PCNPA’s popular visitor sites. Their commitment and hard-work has underpinned the Authority’s approach and continues to shape operations going forward.

### Visitor Numbers

The table below highlights the catastrophic drop in visitor numbers caused by the impacts of COVID-19. The drop in numbers is linked primarily to the two national lockdowns in Wales, the need to restrict the number of visitors at our sites in-line with WG guidance (in order to support social distancing and keep everyone safe), and the cancellation of the vast majority of events throughout the season that traditionally help to draw people to the Authority’s visitor attractions year-on-year. However, the figures also highlight how important key sites, such as Oriel y Parc, are to visitors who have continued to access PCNPA’s services once travel restrictions were lifted.

	2019	2020	Comment
Oriel y Parc Visitor Figures (March – October)	99,829	27,272	73% decrease on 2019. Re-opened in July. Closed during October firebreak period.
Carew Visitor Figures (March – October)	41,043	11,431	72% decrease on 2019. Re-opened in July. Closed during October firebreak period.
Castell Henllys Visitor Figures (March – October)	16,934	5,070	70% decrease on 2019. Re-opened in July. Closed during October firebreak period.

### Adapting Sites

As mentioned previously, the need to make physical adaptations to the sites in response to COVID-19 and to address the backlog of maintenance jobs that had built-up whilst the sites were closed for 3 months was a huge undertaking. A few images are captured below to illustrate some of the changes made but further details can be access via the main [PCNPA website](#).



All sites faced considerable challenges including reducing visitor capacity, implementing clear and concise on-site signage, marking one-way systems, rapid staff training, erecting counter safety shields, installing anti-viral hygiene equipment, updated marketing information, purchasing personal protective equipment (PPE), etc.

The changes made to the Authority's visitor sites involved a wide range of staff from across the Countryside, Community and Visitor Services Directorate (especially the three Visitor Services Managers and Building Projects Manager) as well as Support Services staff (Communications, HR, Finance and IT) working in close collaboration. In short, the importance of team working was pivotal to operations and remains t.

### Site Maintenance

All of the visitor attraction sites needed urgent grounds maintenance in order to re-open as not only had works been put on-hold during the lockdown but the Warden Teams were initially focussed on getting the Coast Path up to standard in readiness for the national lockdown restrictions being lifted. However, the teams pulled together to re-prioritise ground maintenance works and, as a result, the visitor attraction sites were able to re-open to the public almost as soon as the lockdown restrictions were lifted.

A good example of this work is at Carew Castle where the plants, herbs, fruit and vegetables in the Walled Garden area had taken over but Discovery Guide, Dinah Thompson (who leads a small team of gardening volunteers), single-handedly got everything back into shape in readiness for the site re-opening.

### Staff Engagement

The Visitor Services staff across all sites were directly involved in shaping the safety changes in order to facilitate their return to work. Decisions were made together as well as individuals taking on responsibility for implementing key changes. This has engendered a sense of ownership and responsibility across staff teams, in turn, building greater resilience and mutual support.

*"There has been a big feeling of teamwork and togetherness during our return to work and since then. The team morale has grown stronger since returning and there is a sense of togetherness and solidarity in overcoming obstacles and getting back to work."* (Claire Bates – Visitor Services Manager – Oriel y Parc).

### Volunteers

The support provided by volunteers across all of PCNPA's visitor attractions sites adds enormous value to the services available. Volunteers were gradually able to return to sites and, in some areas, new volunteering opportunities were created to help the Authority adapt to the new COVID-19 situation. A good example includes a new 'welcome' role at Oriel y Parc which has helped in managing visitor flow into the building in order to keep everyone safe.

### Retail Operations

Due to the coronavirus lockdown the Authority needed to review the entire retail operation, a part of this included reducing shop and retail stock considerably as well as re-organising shop layouts to ensure visitors and staff were safe. At Castell Henllys this involved relocating the entire retail space to better manage the flow of visitors through the main building and support social distancing.

At the same time, this gave the Visitor Services teams an opportunity to really critique the product offerings and only offer items that would deliver key messages and prove popular with customers. Although general income is down (due to the significant drop in visitor numbers), visitors were still spending money at PCNPA's retail shops. This has been particularly noticeable at OyP where the average spend-per-head is, in fact, slightly up on last year.

In addition to rationalising product lines the sites have continued to support more local businesses by stocking their products for sale too. Examples include local soap made in St Davids as well as jewellery and gifts made in Saundersfoot, etc. This stock has proved popular and is something which the Authority will continue to develop via the work of the internal Commercial Group. Supporting smaller businesses during this time has been very well received and is an all-round good news story.

### Oriel y Parc Gallery and Exhibitions

The Oriel y Parc (OyP) team have continued to work with *Amgueddfa Cymru*- National Museum Wales (AC-NMW) during this time and have found solutions to opening the gallery in a covid-safe way. The Building Projects Manager and OyP Site Warden, Nigel Paynton, have worked with engineers to ensure the air flow and re-circulation is safe for staff and visitors as well as replacing previous touch-screen interactives with new wall panels. In addition, the team created robust cleaning procedures to ensure the area is safe, but have been careful to implement changes in a way which doesn't deter from the quality of the visitor experience.

Similarly, as soon as the OyP team returned from lockdown, it was a priority to try to open as much of the wider exhibition space as possible, in addition to the main gallery, in order to support local artists in displaying and selling their work. The local exhibitions have been very well-received with notable sales this year. Oriel y Parc received the below feedback from Anita Woods who exhibited at the site during August:

*"The re-opening of Oriel y Parc was such a great lift for me and I am extremely grateful to have had the opportunity to exhibit my work there in August. I'm a self-employed artist and I also run art workshops mainly for visitors. The lockdown had a big impact on my ability to earn as all of the galleries I'm with closed and I couldn't teach. Not all of my venues have re-opened as yet so getting the opportunity to put on the exhibition has really turned everything around for me and has helped to get me back on my feet. The team at Oriel y Parc made everything easy and safe in these circumstances that we find ourselves in. I have experienced fantastic support. Thank you." (Anita Woods – Local Artist)*

### Customer Feedback

The control measures that have been put in-place to ensure the safety of visitors have been universally well received across all sites. The Authority has received many comments from visitors either in-person or via TripAdvisor about the safe and professional COVID-19 precautions.

*"Excellent castle, have visited before but enjoyed it once again. Good Covid measures in place and it wasn't busy when we went. Lots of history and you really*

*get a feel for what the place would have been like. Weather was fantastic when we went, we had a lovely walk around the around the mill pond to the Tidal Mill and back up to the Castle. Staff were very friendly and helpful.” (Ruby S – visit to Carew Castle – Sept 2020 – TripAdvisor)*

*“Unfortunately due to Covid, needed to book prior to visit, we hadn't. However we had a pleasant walk around the castle with our dog, free parking also available.” (Anonymous – visit to Carew Castle – Sept 2020 – TripAdvisor)*

### Community Liaison

With a decline in visitors from further afield over the summer all sites turned their attentions to attracting local residents to enjoy the Authority's attractions whilst they were much quieter than normal. This has proved to be a great way of reminding local residents of the opportunities 'on their doorstep' and a means of the Park Authority 're-connecting' with local communities in and around PCNPA's visitor sites.

Castell Henllys undertook a wide variety of successful community initiatives after lockdown and the *Caffi'r Caban* at Castell Henllys continues to be a big draw for local residents. Similarly, Oriel y Parc (OyP) hosted local discount afternoons which have been very well received. A series of local makers' pop-up markets also ran at OyP from mid-Nov which were well attended and a newly launched letter to Santa service has been successful too. In addition, the OyP team have been offering discounted shopping events for PCNPA staff teams which have been greatly received after such a stressful year for many staff across the Authority.

### Online Systems

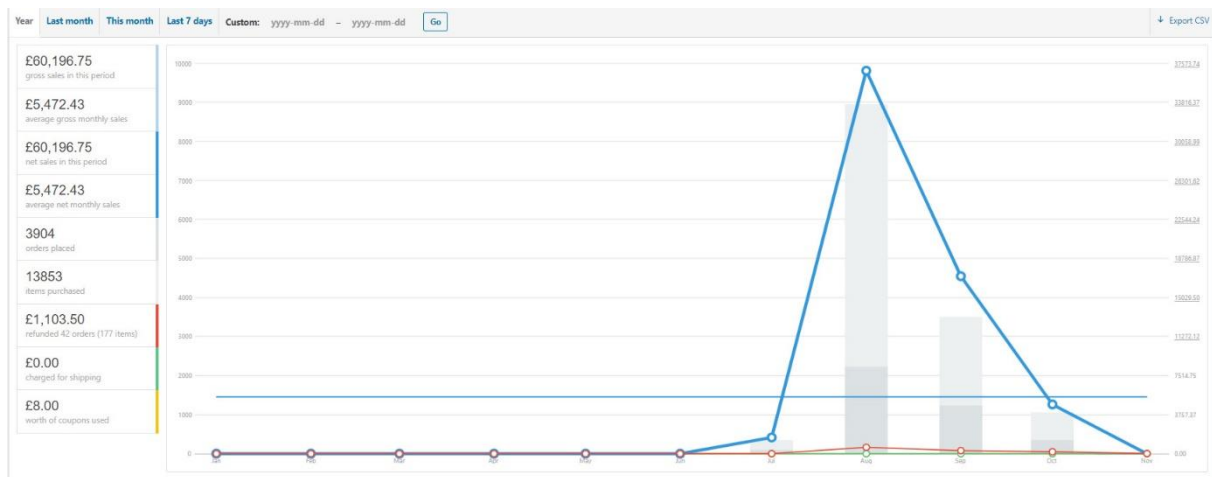
One area of real success during the pandemic has been the Authority's ability to quickly adapt to using online systems to support a number of operations 'on the ground'. This is particularly true when it comes to implementing an online ticketing system for both Castell Henllys and Carew Castle at short notice.

A huge amount of work with fantastic cross-department support allowed a new ticketing system to be available via the Authority's main website following lockdown (this was vital to ensure that our sites met relevant WG COVID-19 regulations and in order to support the 'Test, Trace and Protect' (TTP) response in Wales).

The graph below gives an overview of the importance of the online ticketing system to operations during the main season. It highlights that since the 27<sup>th</sup> July, the Authority sold 13,856 online tickets representing a total of 3,906 order (transactions) which generated a total income of £60,208.75 (see graph below).

Not only did the new ticketing system allow visitors to return to PCNPA's visitor attractions but it provided lots of lessons for running ticketed events in future and helped give confidence in moving away from more traditional 'paper-based' methods.

As a result, Carew Castle moved a number of record keeping tasks online such as routine maintenance tasks, regular masonry checks, play area checks, etc and a similar GIS-based system of reporting was also introduced at Castell Henllys.



In addition, all sites managed to build their social media following during lockdown and Oriel y Parc were particularly creative running virtual arts exhibitions online and promoting local businesses via a virtual food festival. The OyP team also continued to send out a monthly e-newsletter to keep in touch with local residents and customers.

### Financial Position

The significant drop in visitor numbers caused an equally significant decline in visitor generated income with the Authority losing approximately £450K of budgeted income across the visitor sites for the 2019/20 season. This would have proven catastrophic to the Authority’s Visitor Services operations if not for the wide range of financial support made available to PCNPA via the UK Government, Welsh Government and Pembrokeshire County Council. As a result, the Authority has managed to off-set the loss of income for 2019/20 as detailed in Appendix A.

### Current Situation

Despite being able to off-set the majority of lost income, the Authority undertook the unprecedented decision to temporarily close both Carew Castle and Castell Henllys until 2021 in order to minimise losses and to ensure that the Authority is in the best financial position possible to face the challenges ahead in the 2021/22 financial year.

Budget forecasting in relation to Visitor Services income can be tricky at the best of times but is even more challenging in the context of COVID-19 and its potential impact on the tourism industry in 2021. For this reason, the temporary closure of PCNPA’s two castle sites was seen as being prudent in the context of safeguarding future operations and the Authority’s overall budget position.

### Update – 1<sup>st</sup> Dec

The announcement by the First Minister on the 30<sup>th</sup> November highlighted the advent of revised COVID-19 regulations in Wales that come into force on the 4<sup>th</sup> Dec. The new regulations impact on operations at Oriel y Parc but, at the time of writing this report, the Park Authority is awaiting further written details from Welsh Government officials on the new COVID-19 regulations. A verbal update will, therefore, be provided at the committee meeting.

### Looking Ahead – 2021 Season

Despite the challenges of 2020 the Visitor Services team are already starting to plan ahead to next season. A lot of lessons have been learnt this year and, as a result, the Authority has a clearer view of the number of visitors that can safely access PCNPA's visitor attractions whilst maintaining social distancing.

The teams are planning the associated events and activities programme for 2021 with greater optimism now that new approaches have been safely tried and tested. In particular, a focus on outdoor events will form the main focus for next year and it is hoped that some favourites will return in 2021 such as socially distanced outdoor theatre at Carew Castle.

The hosting of virtual events has been a new approach for the Authority and some events such as those hosted by Castell Henllys as well as the annual Archaeology Day, organised in conjunction with PLANED, proved as popular as ever. As a result, Oriel y Parc are considering inviting local schools to take part in a virtual dragon parade for St Davids Day in 2021 as well exploring ways to bring future gallery exhibitions to life online.

### Conclusion

The wide ranging impact of COVID-19 on the Authority's services, including PCNPA's visitor attractions, has been on a scale not seen since the outbreak of Foot and Mouth disease back in 2001. It has created challenges that could never have been envisaged at the start of the year which, in turn, has impacted on the wider visitor economy across Pembrokeshire.

It is difficult to know exactly what 2021 will bring in terms of the continuing management challenges associated with COVID-19 but the Authority's prudent management of resources and rapidly evolving policies and procedures means that PCNPA's visitor attractions are in the strongest position possible to weather any future challenges.

Strong teamwork lies at the heart of the Authority's response to date and, as a result, maintaining good morale and camaraderie between staff is pivotal to supporting new and innovative approaches that will help PCNPA's Visitor Services in addressing any associated challenges from COVID-19 during 2021 and beyond.

*"I felt that the three centres really came together during the lockdown. We kept in touch with each other and shared ideas, worries, plans, solutions. For me it was a real 'success story' and is something we should try to continue as much as possible, as we have a lot to learn from each other and can be a valuable support when needed." (Claire Bates – Visitor Services Manager – Oriel y Parc).*

### **RECOMMENDATION:**

**Members are asked to note the report.**

- [Background Documents](#)
- [Coronavirus \(COVID-19\) Recovery Plan – NPA – 29<sup>th</sup> July 2020](#)

*Author:*

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*Consulted/engaged with (internal and/or external stakeholders):*

- Visitor Services Manager (North Pembrokeshire) – Arwel Evans (Maternity Cover)
- Visitor Services Manager (West Pembrokeshire) – Claire Bates
- Visitor Services Manager (South Pembrokeshire) – Daisy Hughes
- Finance Manager – Richard Griffiths



Appendix A

<b>2020/21 2nd Quarter Income Versus Budget &amp; Prior Years</b>											
<b>Merchandise Sales</b>	Budget	YTD Actual	Variance	2019/20	Variance	2018/19	Variance	2017/18	Variance	2016/17	Variance
Carew Income	65,215	15,041	-50,174	66,875	-51,833	70,978	-55,937	71,006	-55,965	67,689	-52,648
Oriel Y Parc	88,722	37,116	-51,606	88,724	-51,608	90,977	-53,861	88,927	-51,811	84,645	-47,529
Castell Henllys Income	25,907	7,133	-18,774	25,906	-18,773	28,533	-21,400	34,906	-27,773	32,213	-25,080
	<b>179,844</b>	<b>59,290</b>	<b>-120,554</b>	<b>181,504</b>	<b>-122,214</b>	<b>190,488</b>	<b>-131,198</b>	<b>194,839</b>	<b>-135,549</b>	<b>184,547</b>	<b>-125,257</b>
<b>Admission Fees</b>											
Carew Income	126,001	43,221	-82,780	133,784	-90,563	121,061	-77,840	127,882	-84,660	105,663	-62,442
Castell Henllys	57,480	15,557	-41,923	57,479	-41,921	59,446	-43,888	68,614	-53,057	49,093	-33,536
	<b>183,481</b>	<b>58,779</b>	<b>-124,703</b>	<b>191,263</b>	<b>-132,484</b>	<b>180,507</b>	<b>-121,728</b>	<b>196,496</b>	<b>-137,717</b>	<b>154,756</b>	<b>-95,977</b>

<b>Significant forecasted Budget Variances 2020/21 Additional / Reduced Income</b>	£000's	
Car Park Income	-150	
Centre Income	-250	
Rental Income	-50	
Planning Fees	30	
Rates Support Grant	45	
Welsh Government 1st Qtr Revenue Support Grant	292	
Furlough claims HMRC	150	67