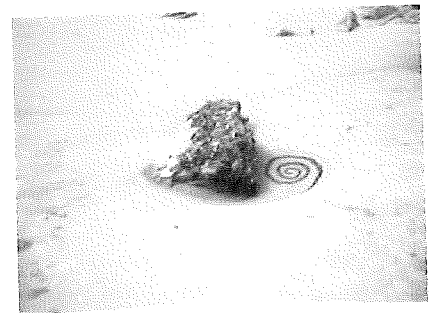
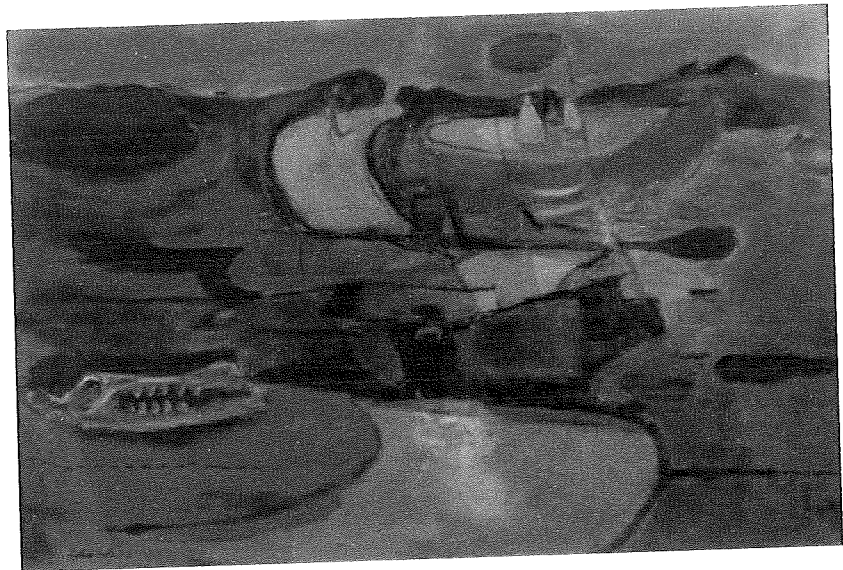




Horizon
Gorwel

DCA

Celebrating the landscape of Pembrokeshire, the heritage of Graham Sutherland and the relationship of art and nature



January 2004
Final Report

DCA

Market House Market Road
Cardiff CF5 1QE
Ty'r Farchnad Stryd y Farchnad
Caerdydd CF5 1QE
T: 029 2023 3750 F: 029 2023 3751
E: mail@fothergill.net
www.fothergill.net

DCA (Cardiff) Ltd
Company No/Rhif Cwm: 3162039
Vat No/Rhif Taw : 667 1317 28
Image: Steven Hopkin-Jones

DCA

A new gallery and attraction for St Davids

Final Report

Contents

Summary	2
Background	3
Vision and Direction	7
Market and Potential Attendance	20
Staffing, sustainability, management and realisation	29

Horizon

Creating an inspirational new attraction for St Davids

The project set out in this report will create a unique new attraction in then city, and a fitting tribute to Graham Sutherland.

This new, focused, and high-profile attraction will generate substantial benefits to the cultural life and economy of Pembrokeshire. It will create a new educational resource and a centre for the celebration and interpretation of rural Pembrokeshire.

The facilities will centre on a permanent exhibition celebrating Sutherland's work, including the permanent housing of the large painting series commissioned for the Sutherland Gallery at Picton Castle.

Alongside this space will be an open gallery area housing a changing programme of temporary exhibitions of contemporary work, interspersed with that of Sutherland, and with material from the natural history and other collections of the National Museums & Galleries of Wales.

A new series of education spaces and a café will complement the existing work of the National Park Visitor Centre.

Entry to exhibitions will be free and the centre will bring new resources to education and community activity in the city.

The centre will be supported and enabled by a broad partnership with the full involvement of the Pembrokeshire Coast National Park Authority and the National Museums & Galleries of Wales.

The broad Steering Group for the project are currently engaged in the development of the funding package for the realisation of the new centre, which it hoped to complete during 2005.

DCA

A new gallery and attraction for St Davids

Final Report

1. Background

The background to the current study lies in the commitment to find or develop a new venue in Pembrokeshire for the works of landscape painter Graham Sutherland, previously held and shown at Picton Castle.

When Sutherland died in 1980, he left more than 600 works (oils and works on paper), with the intention that they should be exhibited in Pembrokeshire, where he had lived and painted periodically through much of his career.

A number of studies and plans for a venue capable of hosting and exhibiting the collection have been brought forward but none has thus far been realised.

Sutherland is one of the great twentieth century British artists. Recently his work and reputation have increased in prominence and public interest. 2003 is the 100th anniversary of his birth and the exhibition at Olympia this year showed how fresh and relevant his work is, and how popular it remains.

At the same time, St Davids has become the focus for a considerable tourism industry in the northern half of Pembrokeshire. Much of this tourism business, which generates over 500,000 visits to the city annually, is rooted in appreciation for the landscape and quality of light which has traditionally attracted artists to work here, and this cultural richness also features in the tourist, and indigenous, economy of the region.

The drive to reinforce the tourism position of the County, and of South West Wales generally, and to ensure that visitors have sufficient range of indoor and outdoor attractions to ensure longer and more economically generative visits, gives a sense of priority to the current project.

Finally, the relationship between the natural world and the ways in which this world is represented by man, with a history going back to cave painting, is a high-profile and popular subject. This popularity is based on both cultural and environmental concerns and interests. There is an increasing interest in the history of the way artists have represented Wales, its landscapes and identity. This is complemented by growing interest in ecology and sustainability in the natural

environment. All partners to the project have a commitment to celebrating the identity and culture of the region.

The long history of landscape art and artist practice in Pembrokeshire is widely known and lives on in a range of studios, galleries, painting holidays, woollen mills, craft centres and other activities. It seems to us fair to suggest that this artistic practice - both its history and its contemporary energy and quality, constitutes a special characteristic of the Park.

This gives the Park Authority an opportunity, at St Davids, to make an innovative and highly accessible response to the second of the statutory duties placed upon it:

"to promote opportunities for public enjoyment and understanding of the special qualities of the National Park"

The Pembrokeshire Coast National Park Authority and education providers in the County share an interest in the development of resources that help people to understand the heritage and sustainability of the environment around them. At the meeting point of environmental education, histories and representation of land use and the lives of the people of the county as depicted in the work of artists, lies the potential to bring to life a range of areas of the national curriculum, as well as to provide formal and informal education opportunities for visitors and residents.

All of these factors have come together to give a fresh imperative to the creation of a potential attraction in St Davids.

Since late 2000, the Pembrokeshire Coast National Park Authority have worked with a steering group consisting of the Friends of the Sutherland Collection, St Davids City Council, Pembrokeshire County Council, Countryside Council for Wales, Welsh Development Agency, Arts Council of Wales, Wales Tourist Board and National Museums & Galleries of Wales, to develop a practical new proposal for the project.

This study has resulted in a new vision for a project based on the existing National Park Visitor Centre that brings together the legacy of Graham Sutherland with contemporary concerns for, and representations of, the environment. The principal direction of the project can be summarised in the following statements about its potential mission:

- A new and unique place and programme that explores Pembrokeshire "this place of light and land and longing..."
- A place and programme that looks out at the world around us; the land and sea, nature and the work of man upon it;

- A place and programme that explores the landscape through the eyes of artists and people of imagination and creativity
- A place and programme that looks through the eyes of the great artists who have imagined Pembrokeshire in their work - and pre-eminent among them one of Britain's greatest painters - Graham Sutherland.

The proposition of a new, focused, high-profile attraction based on these values has the potential to generate substantial benefits to the local economy, and represents a significant addition to the tourism offer of the County. It creates a new educational resource and a centre for the celebration and interpretation of rural Pembrokeshire.

The project is underpinned by two main partners - the Pembrokeshire Coast National Park Authority and the National Museums & Galleries of Wales. The National Museum are in turn specifically supported by the National Assembly to ensure that their collections are seen in partner venues at key locations in Wales. A new venue at St Davids has the potential to play a key role in the Museum's strategy for sharing this work, in particular the collection of the work of Graham Sutherland.

Whilst the benefits of the project are significant, its capital and revenue requirements are relatively modest, in part due to the value of the support that the Park Authority and the National Museum can offer to the project.

It presents an immediate and practically realisable opportunity to create a landmark new development of national and international profile in the north-west of the County, contributing sustainable jobs and economic growth and ensuring that Pembrokeshire remains competitive in the visitor market as other Welsh destinations develop and open new attractions.

The report is designed to record the findings of an extensive programme of research carried out over the early part of 2003. This research consisted of extensive consultation and interviewing of interested parties, study of comparable developments in other countries, discussions with potential funders and partners, consideration of aspects of heritage and conservation of the Sutherland collection and the development of a set of indicative programmes for the proposed new attraction.

Having established a core concept for the proposed development, and having confirmed the view expressed in the brief for the project that the appropriate site for the development was as a 'completion' of the existing St Davids visitor centre, business, management and programme planning has been paralleled by the

development of architectural plans and drawings of the facility and of a capital cost plan. All elements of this work are set out in this report.

In the course of the study, some discussion has naturally taken place on the naming and brand or language of the new centre. Although no suggestion is made here that this process has been exhausted, we note the result of discussions here, as a prelude to using a working title for the development as we proceed through this report.

For the moment, the authors have adopted the working name 'Horizon', 'Gorwel' in Welsh, to replace the previous working title 'The Sutherland Centre'. We have done so only to give a sense of the brand that the new project might develop, and to facilitate writing about it.

'Horizon' does perhaps sum up one of the unique and enduring strengths of Pembrokeshire, the meeting point of light and land, land and sea. The quality of this meeting point, and the natural world that occupies it, has placed Pembrokeshire at the heart of the artistic life of Wales and generated a great tradition of landscape art. Graham Sutherland is only one, but a very important, exponent of this art. It might be seen as fitting that his work should be the filter through which we enable people of all ages, and from all places, to see the natural world, and the art of others, afresh. That the current project can do so sustainably and with considerable benefit to the prosperity of the County is a particularly positive outcome of the study.

In arriving at these outcomes we would wish to thank the steering group for the project, and particularly the staff of the Pembrokeshire Coast National Park Authority, National Museums & Galleries of Wales and Friends of the Sutherland Collection, for their commitment of time and goodwill to the project. Any errors remain our responsibility.

DCA (Cardiff) Ltd. lead consultants
Smith Roberts Architects
Davis Langdon & Everest Quantity Surveyors
January 2004

DCA

A new gallery and attraction for St Davids

Final Report

2. Vision and direction

At the conclusion of the study, we believe that a very positive and realisable project has emerged that respects the origins and intentions of the move to create a new home for the Sutherland collection in St Davids, whilst responding to current circumstances, curatorial trends and availability of resources for the realisation and management of the project.

We believe that the project as explored in this report is:

- fundable in the reasonably short term
- an appropriate response to the visitor, education and local markets
- culturally coherent and distinctive
- capable of attracting and servicing significant numbers of visitors
- lean and pragmatic in management terms
- a fitting response to Sutherland, his work and his legacy
- manageable and sustainable in the short, medium and long term

Past visions

The potential for the development of a new gallery and attraction in St Davids, based on the Sutherland collection, has gone through a number of stages of development. The most recent full expression of the scheme was the Outline Business Plan for National Gallery West at St Davids, commissioned by the St Davids City Council and NM&GW in 1997 (with updated market assessment by L&R consulting in 2000).

This model rested upon the creation of a new building housing the Sutherland Collection as well as showing elements of it. Some contemporary artistic engagement and interpretation of the national park was envisaged. The project was to be a substantial one, with a considerable capital budget and a staff of 11 plus catering and other ancillary staff, an appropriate complement given the need to care for and give access to the collection as well as arranging and promoting exhibitions from it.

The site of the proposed attraction was not at that point finally resolved, and the report presented an option analysis of several sites in the city.

In order to ensure its own sustainability, the plan argued that the attraction would charge admission fees, and projected visitor numbers were therefore a very sensitive assumption. The report foresaw visitor numbers rising from a year one base of 61,000 at admission charges ranging from £2.75 for an adult visitor to £1.50 for children.

During the current study the National Gallery West proposition has been reviewed in detail. Circumstances have changed since 1997, and the context for developments of this type has changed in a number of ways:

- The advent of free-entry to sites of the National Museums & Galleries of Wales has changed both the competitive environment and the expectation of customers. The new development at St David's would be perceived by visitors as close to a National Museum attraction in style, and that there would be significant resistance to admission charging.
- Confidence in the business planning of early visual arts lottery projects that led to their reliance on admission charging has been damaged by a number of failed or problematic projects. Prudent planning must now be based on the default position of free entry for the main part of most visual arts institutions.
- Arts projects continue to face competition from the broader leisure sector for general admissions. Pressure on schools has led to a more price-sensitive market in school visits.
- As exemplified by free entry to NM&GW sites, there is a prevailing political imperative since the inception of the National Assembly for Wales, to ensure that people all over Wales have access to the cultural treasures of the nation. Opening-up access to the works left by Graham Sutherland to the people of Pembrokeshire should therefore be a policy priority.
- The debate about the development of a National Gallery for Wales and the development of the partnership scheme Cyfoeth Cymru Gyfan has made it unlikely that a major national institution within or close to NM&GW, as the National Gallery West was envisaged, would be supported as an appropriate initiative.
- Capital funds have declined for visual arts projects in Wales, with the reduction in lottery receipts. Although other funds such as Objective 1 may assist, projects will be more likely to succeed if they are limited in capital cost and can be realised by modest funding from a range of partners.

A New Vision

In these circumstances, we do not believe that the National Gallery West proposition will now be appropriate or realisable and we propose a leaner, more

contemporary, integrated attraction than has perhaps been previously discussed. To recap, we suggest the following vision for the new project:

- A new and unique place and programme that explores Pembrokeshire "this place of light and land and longing...".
- A place and programme that looks out at the world around us; the land and sea, nature and the work of man upon it;
- A place and programme that explores the landscape through the eyes of artists and people of imagination and creativity
- A place and programme that looks through the eyes of the great artists who have imagined Pembrokeshire in their work - and pre-eminent among them one of Britain's greatest painters - Graham Sutherland.

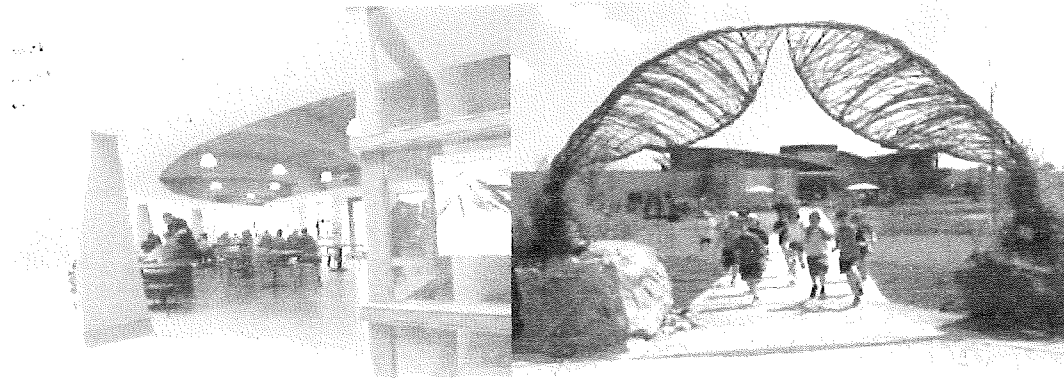
The central challenge will be to present a genuine and warm homage to/exploration of Sutherland and the representations of Pembrokeshire made during the twentieth century by fellow artists, alongside a set of contemporary explorations of art and the environment.

The centre should follow the best practice of both the contemporary arts and museums sectors in using the work of the last century to bring into focus concerns and ideas about the future.

At the same time, the centre has the potential to draw on new practices in multidisciplinary working emerging in the museums sector - where art and artefacts are increasingly brought together to tell stories and interpret histories for visitors of all ages. The National Museums & Galleries of Wales has developed this approach over many years in its approach to Welsh history at sites such as the Museum of Welsh Life, and more recently in themed multidisciplinary exhibitions such as that focusing on flight.

A number of new projects created in celebration of the Millennium have placed the integration of the arts and the exploration of the natural world at the heart of their way of working. In Wales the principal example has been the National Botanic Garden, where commissions of and events created by artists have been a high profile element in the life of the Garden. Notwithstanding the current difficulties of the Park in financial planning, the integration of landscape and art has been much applauded and much commented by visitors as an attractive and fresh element in the experience of visiting the attraction.

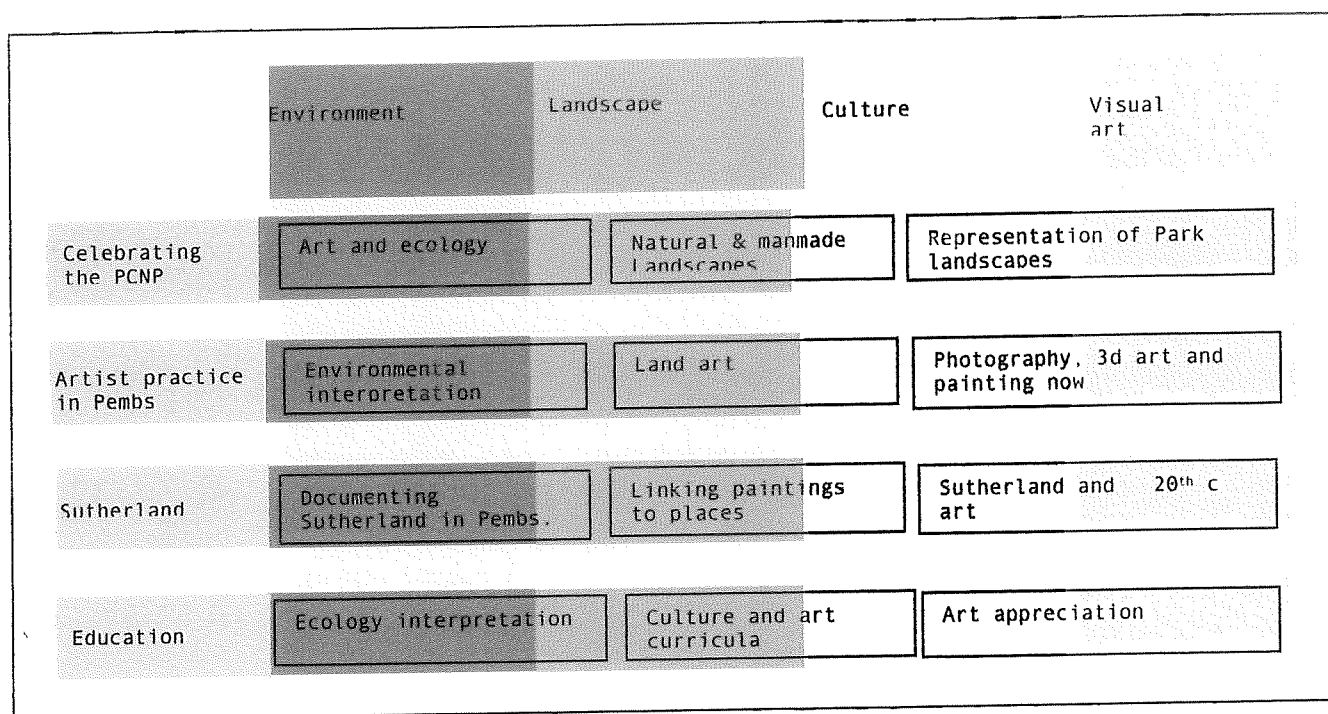
In England, centres such as the Secret Hills Centre in Shropshire (below left) and Conkers (below right) have pioneered the exploration of landscape and nature through multidisciplinary visitor attractions and the integration of art and artworks.



In this sense, both the heritage of Sutherland and of the contemporary practice of art in Pembrokeshire and the way that this practice continues today can be presented alongside one-another in a way that offers a coherent experience to visitors regardless of the perspective from which they approach the material.

The work of Sutherland continues to offer a filter through which people can be led to look at the landscape around them, but the project must also address growing interest in ecology, sustainability and broader issues of cultural identity.

The inter-play of these elements can be represented by the following 'chromatic', showing how a coherent and readily intelligible identity can be developed and projected given a range of concerns:



Direction - programme structure and activity

In content terms, we suggest that the above vision might be delivered through a mixed programme of exhibition, education activity, interpretation and visitor attraction. This would include the following elements:

- An integrated temporary exhibition programme of three shows each year curated to a theme and drawing on the Sutherland works, works by others who have painted or represented Pembrokeshire in their work (Piper, Steadman, etc.), works by contemporary artists, natural history and other exhibits and material, sound, video, projection and interactive elements. Interpretation and imaginative ways of introducing the audience to the work will be of key importance. This programme might best be realised in either one larger gallery or two contiguous gallery spaces. We anticipate that each show would include examples of the Sutherland oils but this may only be a small number of paintings in each show. We return to this point below.
- Programmes of artist residency and education provision using these exhibitions as the starting point and creating material that, in turn, fills out the exhibition programme. These programmes will demand education/studio facilities.
- A smaller and more contemplative, long-term, exhibition about and of Sutherland. This would be a smaller space off the main gallery, blacked out and holding smaller works on paper, sketchbooks, screen based multimedia presentations and the telling of a story by both traditional and interactive

interpretation. This exhibition would be structurally permanent, and the narrative would remain essentially constant, even though display systems would be flexible. The works on paper, sketches or other material would change on a cycle to respect its sensitivity to light exposure (no single piece to be on display for more than 6 months in 2 years). This work would be supported by a handling collection of Sutherland material, and an education and interpretation framework, through which schools, and others, can explore the painter's heritage.

Below, we set out some exemplar programmes for the primary gallery, and illustrate them. It is important to note that these suggestions are indicative, they are intended only to give a flavour of the experience that the centre might offer:

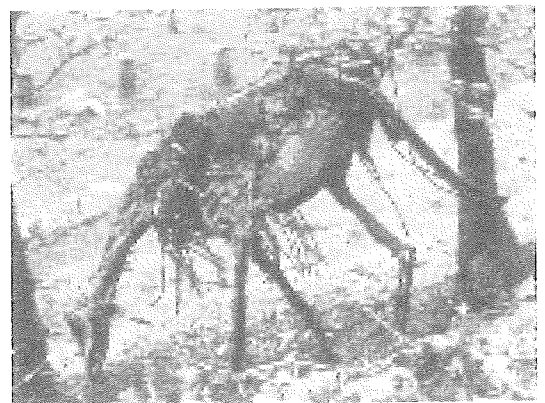
- **THORN** (a March-May show) - works showing Sutherland's 'Pembrokeshire Thorn' and the influence it had on his work, material from the natural history collections of the Museum on hedges, thorns, etc., Gregory Crewdson's photo series 'Legs Growing Thorns'. A hedgerow residency by an artist or 'natural explorer' might draw upon and present material generated by the existing 'SCAN' network of schools studying local hedgerows. A series of guided walks and routes in and around the city that touch upon and explore the hedge might extend the visitor experience. In this way, one of the essential icons of Sutherland's work is explored in the context of hedges as a feature in the man-made landscape and natural life of the area, and the lineage of artist's concern with thorns traced from Sutherland to contemporary practice.



- **LAND AND PEOPLE** (an October-February show) - works showing Sutherland's attachment to particular farms and the way people live in the Pembrokeshire countryside, material from the Museum of Welsh Life on settlement and land in Pembrokeshire, the products of a residency by e.g. Graham Murrell (*Light Spells* - Kettles Yard and other photographic works). Guided walks and routes exploring the city itself - it's fabric, history and people.



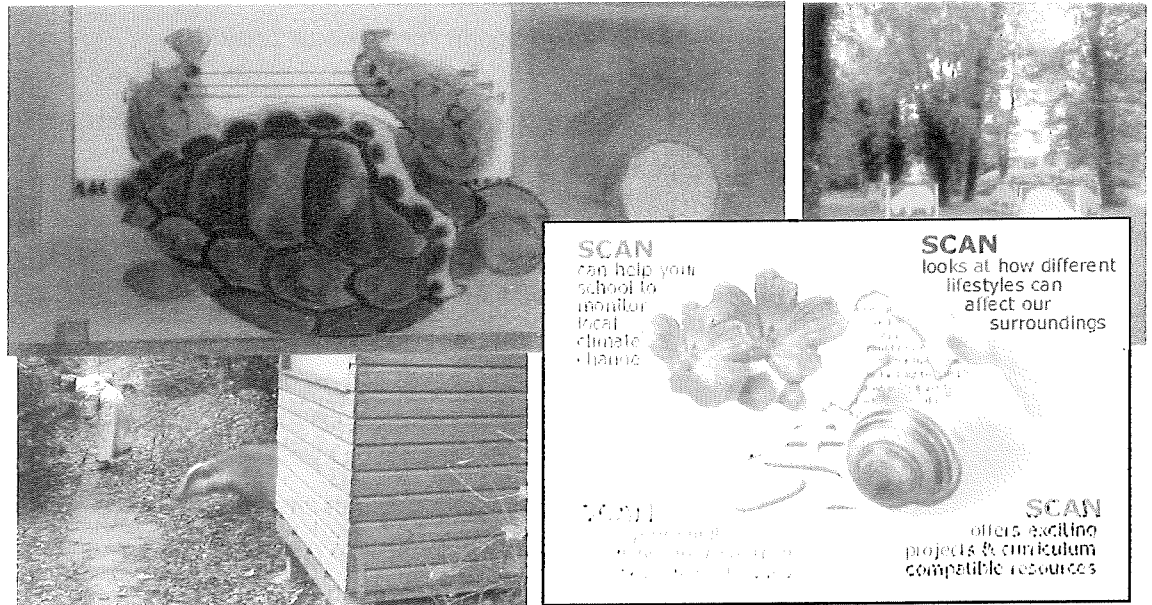
- **FIELD, FOREST** (a June - September show) - works showing how Sutherland dealt with the variety of landscape - the hill paintings, his fascination with the rock coast. Other material about the fecundity and variety of the landscape - and of the diversity of artist's responses to it.



- **LIMINAL** (an October-February show) - a show about light and the meeting points of sky and land, land and sea, sea and sky. The Sutherland paintings in which the horizon is the dominant feature, the natural history of the coastline, a celebration of the islands, sound projection of an epic sea poem, contemporary work from artists such as Long (Slate Atlantic), Ackroyd and Harvey (Floating Field), etc. Residency and workshops with Tina Cunningham.



- **BEAST** (a June -September show) - Animals - Sutherland sketches on this theme, biodiversity material from the Museum's collections. spectacular video material from the tracking of animals in the landscape, in burrows, etc. A commissioned soundscape of bird sound or dolphin calls, Julian Opie's Sheep Cow Deer Dog Chicken Cat Goat. A residency by Sally Matthews (Wolves etc.), Jenny Savage (Limited, etc.)



- **UNEARTH (a March to May show) - focusing on the way that both artist practice and environmental education can explore and interact with nature from the gallery. Potentially working with artists such as Susan Alexis Collins (her nature study installation made with schoolchildren is shown below left) and with the Museum's biodiversity staff to mount explorations of the ecology of the city.**

Curatorial implications and the collection

A number of points arise from this way forward:

The Sutherland collection remains in the care of NMGW in its stores at Cardiff/Nantgarw, with the exception of the large paintings commissioned for Picton Castle, which are re-housed in the new centre at St Davids in a vertical rack storage system embedded in the main gallery wall.

During the study, careful consideration has been given to the question of whether the collection could return in whole for storage and access in Pembrokeshire. We conclude that there is no realistic prospect of creating either the facilities or the staff complement that would be required to take the storage of the full collection back to Pembrokeshire.

- The creation of appropriate space and environmental conditions would in itself be a substantial task - beyond the likely availability of capital resources under current funding regimes.
- The creation of an institution with sufficient staff and specialisation of skills to properly care for and manage the collection (including overseeing research and public access, managing loans and transport, undertaking or commissioning restoration and conservation and preparing works for exhibition) would necessitate an operating budget beyond that which we believe can be commanded by the project in current circumstances.
- Flexible central storage provided by the Museum allows the selection of the Sutherland work alongside and in the context of other art and other contextual collections, e.g. natural history - extending the range of possibility of exhibitions in the new centre.

However, the new centre would have to have prioritised access to the collection and support from NM&GW in the preparation, transport and hanging of the works for changing exhibitions in St Davids. The larger paintings are less environmentally sensitive than many of the works on paper and smaller works, but present a particular challenge to transport. As these works were specifically commissioned to be housed in the Sutherland galleries at Picton it seems appropriate that they should be kept at St Davids and form the backbone of the way in which the Sutherlands contribute to the temporary exhibition programme.

We suggest a standing agreement with NM&GW for loans from the remainder of the collection - with the selection discussed between the curator of the new centre and NM&GW - planned probably three years ahead. This relationship between NM&GW and new centre would fit well in the likely long-term life of the Cyfoeth Cymru Gyfan partnership scheme - and may in fact be a useful exemplar for the Museum.

All conservation of the collection, preparation for exhibition and other technical support, and the transport of smaller work to St Davids would be carried out by NM&GW - whose technicians or hired specialists would then unpack and hang the work.

Although a small technical space and a store would still be needed, this is a pragmatic approach to the availability of space and resource at St Davids. Nonetheless, the galleries at St Davids would need to be environmentally conditioned to an agreed standard, and the management team would need to be a suitably experienced and resourced group to enable NM&GW to be confident that it could loan the work. These requirements are taken into account in the specifications upon which the designs, costings and staff and business plans set out in this report are based.

In this model, Sutherland is celebrated at St Davids through inclusion of works in the thematic temporary exhibitions and, substantially and permanently in the smaller 'Sutherland Gallery' space.

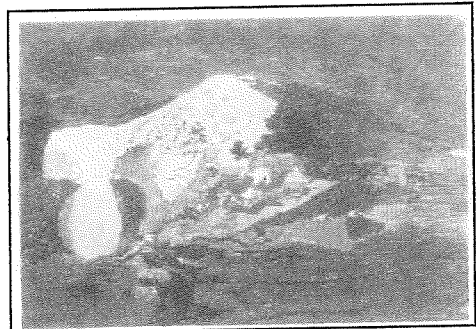
Here, contemporaneous material, Sutherland's work and material interpretative of his vision can be shown together to offer an insight into the value of Sutherland's work and the landscape he saw and painted.

This Sutherland room can, then, be a distillation and celebration of his love of, and relationship with, Pembrokeshire.

"After a good deal of wondering about, I came upon two very remarkable passages of country situated in the arms of land which embrace the great area of St Brides Bay. The arm towards the North is like an isosceles triangle on the side, the narrowest angle forming St David's Head to the west.

One approaches across a wide plain from the North its emptiness relieved by the interlocking of tightly packed strips of field and their bounding walls of turf covered rocks. One soon notices an irregularity of contour on the horizon which resolves itself into what appears to be two mountains.

As one approaches still closer one sees that these masses of rock scarcely attain a height of more than 700 feet. But classically perfect is their form and so majestic of their command of the smoothly rising ground below, that the mind comfortably corrects the measurement of the eye and holds their essential mountainous significance."



In addition, providing intellectual property issues can be resolved, we suggest that the project should work with NM&GW to complete an early digitisation of significant numbers of the works held in the collection.

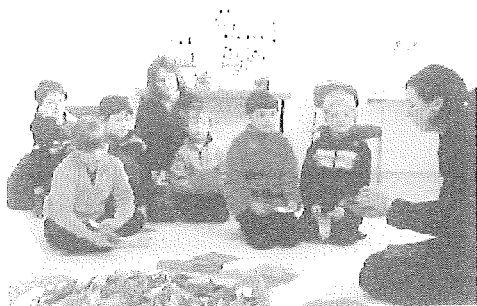
The success of Gathering the Jewels, the project by which the cultural heritage of Wales has been digitised and made available on the internet, demonstrates the potential of such digitisation to open access to work such as Sutherland's. The staff team and resources developed through Gathering the Jewels and through the Museum's own digitisation programmes should enable an economic and effective programme of digitisation of the Sutherland works.

These digital images could then be accessible on the exhibition interactives, at St Davids - a new-century equivalent to the work coming 'home'. A decision to digitise and make available the collection would be a very positive announcement at the launch of the plan for a new centre.

Education and group activities

Alongside the exhibition programme in the temporary main gallery and the evolving permanent exploration of the work of Sutherland, the centre has the potential to engage with the education market and the potential for group activity already apparent in the regular and diverse use of the meeting and activity space in the current visitor centre building.

The education programmes of the Secret Hills Centre, discussed above, offer some examples of the kinds of structure and content that Horizon might develop, offering KS1 and KS2 packages and specially developed opportunities for KS3 and above, in science, art, geography and history. In all cases the sessions draw on the exhibitions of the centre and the natural world beyond it. All consider the landscape in which the centre is set as a key context for the particular, curriculum driven, subject matter of the session.



At adult level, there are many opportunities for group visits by societies interested in painting, landscape, Sutherland himself. Locally, there is not inconsiderable demand for adult education and other group activities, some of which currently happens in the meeting room of the visitor centre, which is too small to properly

respond to the numbers wishing to attend courses or their requirement for facilities and space to work.

Programme summary

By integrating historic art, contemporary art, natural history, education - the project addresses the eligibility issues raised by funders. The new facility would be eligible for capital and revenue funding from all the potential partners discussed during the study including the Arts Council of Wales (focus on contemporary art and practice), Heritage Lottery Fund (Sutherland and the history of art in Pembrokeshire) and economic development and regeneration funders (attraction of visitors, engagement of local creative industries/arts practitioners in residency and education programmes and the development of education programmes for Pembrokeshire schools).

Nationally and internationally, there are a number of centres dealing in this multidisciplinary way with art and environment and Horizon would take a significant place in a network which provides partnerships for the commissioning, touring and interpretation of programmes and exhibitions and the exchange of ideas for development.

In all, the programme envisaged here is both distinctive and pragmatic, building on the strengths of the partners to the project and the interests and enthusiasms of known audiences whilst making a very significant new addition to the image and appeal of the County.

DCA

A new gallery and attraction for St Davids

Final Report

3. Market and potential attendance

The market for, and benefits of, the proposed project can be seen in the context of the overall tourism strategy for Pembrokeshire, the tourism business in St Davids and the existing performance of the visitor centre.

Pembrokeshire County Council's mission statement states:

'By promoting tourism, aims to bring the greatest economic benefits and quality of life to the county's residents at the least cost in terms of congestion, inconvenience and damage to the environment'.

In pursuance of this mission, the County Council have recently developed a new Tourism Strategy in conjunction with the Pembrokeshire Tourism Industry.

Pembrokeshire has always had a high dependency on the tourism industry. Domestic UK tourists went on 2.3 million trips to South West Wales and spent £316 million last year. 183,000 overseas visitors came to South West Wales last year and spent £119 million.

Some 8,448 jobs (6,451 full time equivalents) are supported directly or indirectly by visitor spending in Pembrokeshire alone. This accounts for 1 in 5 jobs in Pembrokeshire. Income to Pembrokeshire residents in wages and profits earned directly from tourism is estimated at £43 million.

The economic benefits of tourism are not restricted solely to the accommodation sector. The PCC Tourism strategy suggests that other sectors benefit considerably, including pubs, cafes and restaurants (£69 million), shops (£43 million) attractions and travel (£40 million).

Although tourism plays such a major part in the regional economy, the Tourism Strategy reflects the need to consolidate successes in the face of increasing competition and to increase the economic yield from visitors attracted. In this respect the current project can contribute to a number of key areas of priority:

- Continued development of facilities and attractants, particularly for niche markets.

- The imperative to extend the season through the development of indoor facilities and year round attraction offers.
- The imperative to extend visitor stays and to make links between different aspects of the County's tourism offer, thus encouraging longer visits.

The County has a number of attractions of varying types and with varying patterns of attendance. Setting aside Oakwood, which dominates visitor figures but has a different market profile and position, those that focus on art and the interpretation of heritage/nature can be summarised as follows:

	1998	1999	2000	2001	% change 2000/2001	Entry £
St David's Cathedral	275,000	273,000	226,000 (major works)	236,000 (2002, 264,000)	11	free
Castell Henllys Iron Age Fort	24,400	26,941	26,000	29,500	13	2.80
St David's Farm Park	20,000	Changed hands	Now just a farm, but	provides walks	-	-
Lamphey Bishops Palace, Pembroke	5,024	-	5,252	5,992	14	2.00
Pembroke Castle	82,128	81,406	73,901	78,234	6	3.00
St David's Bishops Palace	28,178	24,092	24,626	23,370	-5	1.70
Museum of the Home, Pembroke	1,907	1,690	1,515	1,399	-8	1.20
Tenby Museum and art gallery	20,719	19,078	10,701	18,846	76	2.00

The table demonstrates the success of the Cathedral, and the relative difficulty of smaller attractions charging for admission. Nonetheless, the general picture has been one of recovery in visitor numbers following the difficulties caused by foot and mouth.

Generally, evidence suggests that trends in tourism in Pembrokeshire will follow those of recent years in Britain more generally. As one and two week family beach holidays decline, the importance of niche and shorter visits will increase. Increasingly, visitors seek to gain some benefit from leisure trips rather than just rest, leading to trips with a purpose. The arts, ecology/environment and heritage

sectors are all areas of growth in this respect - in response to a range of factors including demographics, television programmes, extension of adult education and other leisure activities.

The Henley Centre predicts that customers will be looking for more authentic experiences and will consider ethical products. There will be a new focus on nostalgia, cultural roots and identities.

The County's Tourism Strategy places a priority on raising awareness of landscape, flora and fauna, heritage and culture of Pembrokeshire". And the proposed project fulfils this in an exemplary way, reinforced by its commitment to and education in respect of "environmentally friendly practices" as prioritised by the Strategy.

New development of the tourism offer in Pembrokeshire will need to reflect these changing patterns of demand in both attractions and accommodation. The County has at times discussed the creation of a 'necklace' of attractions across the county - in an arc from Fishguard and St Davids in the north, through the areas around Haverfordwest and Pembroke and to the Strategic Tourism Growth Area which includes Tenby.

There is a logical way of understanding this 'necklace', with niche, cultural and heritage attractions to from the mid to northern end and family-oriented holidays in the Tenby STGA. Nonetheless, there are also some other useful relationships that link the two ends of the arc - not least the ability to profile the visual arts at both ends - in Tenby Museum and in the new project at St Davids and existing arts activities in Fishguard.

The evidence as to the activities that people in engage in during visits to Wales reinforces this sense of the new attraction being at the meeting point of a number of increasingly important trends:

% of people undertaking an activity while on holiday	Holiday Trips (8.3m)
Participant Activities	%
Walking	74
Swimming	28
Field study/nature study/bird or wildlife watching	22
Cycling	11
Fishing	7
Visiting castles, monuments, churches etc.	33

Visiting museums, art galleries, heritage centres etc.	19
Watching performing arts/cinema	11
Visiting a theme park or activity park	10

The proposed attraction clearly appeals to those significant number of people who are interested in nature (22%) and art galleries and similar attractions (19%) but can also capitalise on the common interest in walking and cycling by acting as departure point and interpreter for a range of landscape and cultural walks around St Davids Head and north Pembrokeshire.

The success of the Visitor Centre is evident in its visitor numbers and merchandising revenues. Numbers of visitors increased year on year from opening to 2002. 2002 itself was a particularly successful year, with numbers boosted by the National Eisteddfod visit to the city.

In 2003, numbers have fallen back from 2002 levels, without the extra visitors generated by the Eisteddfod, and we believe that the centre may have achieved its steady visitor share of the overall St Davids city visitor market - at around 115,000 or a penetration rate of just under 25%.

The following shows total visitor numbers, but also analyses overseas visitors, enquiries and bed nights booked.

The main conclusion to be drawn is the substantial demand for and interest in the centre, and the economic value of a facility that attracts significant numbers of overseas visitors. However, the relatively low proportion of all visits generating bed bookings (whilst understanding that not all overnight stays will be booked through the centre) does suggest that the overall attraction of the city continues to lack sufficient reasons for visitors to 'dwell' longer and extend stays:

	<u>MONTH BY MONTH COMPARISON FIGURES</u>				<u>ST DAVIDS VISITOR CENTRE</u>	
	1999	2000	2001	2002	2003	
TOT VISITORS						
JAN	283	310	1141	707	658	
FEB	1384	2165	1903	2275	1639	
MAR	3080	3571	2123	5326	2693	
APRIL	8147	10701	9843	5941	9996	
MAY	11835	10081	14340	7791	11028	
JUNE	14043	11169	9728	17455	12013	
JULY	20045	22378	17647	26340	19236	
AUG	36256	38488	34544	41093	31067	
SEPT	12059	9757	9878	13281	11159	
OCT	6372	7704	5534	7012	7463	
NOV	2112	1996	2668	1404	1953	
DEC	823	1142	1092	902		

TOTALS	116439	119462	110441	129527	108905
O.S. VISITORS	1999	2000	2001	<i>2002</i>	2003
JAN	20	32	66	61	94
FEB	166	94	112	155	86
MAR	394	420	285	503	253
APRIL	1049	992	554	545	735
MAY	1479	1053	707	992	878
JUNE	1560	1545	749	1755	1355
JULY	2115	2645	1547	3877	2911
AUG	3345	4633	1726	5494	3806
SEPT	1389	1246	836	1278	1019
OCT	748	906	521	779	819
NOV	304	149	166	145	148
DEC	100	70	79	95	
TOTALS	12669	13785	7348	15679	12104
POST IN					
JAN	99	33	93	96	90
FEB	107	82	112	98	94
MAR	125	120	149	129	85
APRIL	106	108	118	117	118
MAY	125	126	125	143	113
JUNE	106	146	137	108	118
JULY	106	165	142	130	124
AUG	107	133	140	124	132
SEPT	83	106	116	204	115
OCT	93	111	107	92	85
NOV	64	92	76	88	57
DEC	62	68	56	68	
TOTALS	1183	1290	1371	1397	1131

MONTH BY MONTH COMPARISON FIGURES			ST DAVIDS VISITOR CENTRE		
PHONE ENQ	1999	2000	2001	2002	2003
JAN	280	160	610	634	719
FEB	714	1002	760	815	853
MAR	940	974	1117	1302	1017
APRIL	1255	1287	1717	961	1437
MAY	1690	1330	2120	1860	1711
JUNE	1830	1590	1508	2529	1787
JULY	2675	2280	2247	3738	3120
AUG	3165	3420	2871	5439	2842
SEPT	1235	1017	1178	2216	1302
OCT	805	545	856	1031	838
NOV	517	565	619	503	372
DEC	438	495	455	470	
TOTALS	15544	14665	16058	21498	15998
TOTAL BEDNIGHTS					

JAN	0	6	9	1	0
FEB	10	14	17	30	0
MAR	44	27	16	104	38
APRIL	193	173	99	142	189
MAY	296	219	226	262	183
JUNE	380	337	213	257	284
JULY	642	507	412	423	421
AUG	983	701	759	608	731
SEPT	269	203	260	382	485
OCT	93	110	102	103	111
NOV	25	9	35	30	24
DEC	11	4	14	1	
TOTALS	2946	2310	2162	2343	2466
OVERSEAS BEDNIGHTS					
JAN	0	4	6	0	0
FEB	6	1	6	30	0
MAR	24	19	7	37	10
APRIL	92	104	23	68	61
MAY	193	153	84	146	74
JUNE	181	200	90	104	163
JULY	343	317	147	165	179
AUG	389	336	225	202	257
SEPT	114	105	93	143	157
OCT	65	61	36	44	49
NOV	21	7	14	10	2
DEC	3	4	1	0	
TOTALS	1431	1311	732	949	952

The centre has achieved these numbers across a period in which the difficulties of foot and mouth and the World Trade Centre attack damaged tourism levels overall and in the face of limited space and resource for exhibitions and activities.

At the same time, the centre has built up a strong base of regular activity - from guided walks to clubs and classes - now running at something in the order of twenty sessions a month.

The experience of the Visitor Centre and of levels of visiting St Davids as a whole are the best indication as to the very substantial potential market for, and effectiveness of, the new project.

St Davids is a key destination in Pembrokeshire. The historic core of the city is designated an Outstanding Conservation Area, while the city and peninsula together have over 30 scheduled ancient monuments and 200 listed buildings. In recent years, the city has experienced more than 500,000 visits per annum (of whom some 50% are counted as visitors to the 37,500ral). Veryrads traffic studies and others since estimate visitor numbers at between 415,000 and 538,000 - with more than 4,000 visits a day throughout the peak season.

Nonetheless, the city has more capacity now for visitors than was the case when visitor numbers reached this peak in the late 90's. The creation of the Visitor Centre and car parks at the east end of the city have helped to reduce congestion and to add another activity to the itinerary of many visitors.

The Visitor Centre would benefit in its overall attraction of visits, both as a penetration of current visitors to St Davids and in terms of new visitors to the city, from the development of a more substantial exhibition and activity programme in the form of the proposed new project.

Overall we suggest a visitor profile for the new, extended visitor centre and Horizon attraction as follows:

Current 25% penetration of St Davids visits	115,000
Increased penetration of St Davids visits to 30%	25,000
Sub-total visitors to Visitor Centre	140,000
Visitor Centre visitors entering Horizon (at 75% of all visitors)	105,000
Add New purposeful visits to Horizon among Pembs visitors	25,000
Add New purposeful visits to Horizon from new visitors to Pembs.	15,000
All visitors to Horizon	145,000

The table shows the degree to which the new attraction will secure new visitors to Pembrokeshire given its special attraction and the demonstrable audiences for Sutherland and for contemporary art.

Among those visitors visiting Pembrokeshire anyway, an added trip to St Davids significantly increases the probability of an extended stay and more impact on the regional economy.

Among those visitors already visiting the city, but attracted additionally to the visitor centre and to the Horizon programmes, the attraction offers the potential for longer stays in the peninsula and city and greater impact on the local economy.

In addition, the pattern of attendance at the St Davids visitor centre at the moment offers an interesting insight into seasonality.

The pattern of attendance is biased toward the Summer months, but not by the degree one might expect given the overall pattern of visiting in the County as a whole. This may reflect the fact that visits to St Davids are somewhat less seasonal than is true overall, but it may also demonstrate that out of the Summer season, visitors appreciate an indoor destination - even if only a visitor centre - and visit it in higher proportions than might be true year-round.

This demonstrates the importance of indoor attractions to the tourism ecology of the area and of the County. The development of Horizon will offer new opportunities for visitors in the shoulder months and out of season, and will enable a new approach to the marketing of the north of the County in the visitor and particularly short-breaks market.

The other key market for Horizon will be the school and education market. Provision in the proposed project will be relevant to Welsh curriculum elements in geography, environmental studies, history and art. There are considerable populations of schoolchildren within the immediate area:

Numbers of school pupils				
	Carmarthenshire	Ceredigion	Pembrokeshire	Totals
Primary	14,893	5,350	9,044	29,287
Secondary	12,134	4,942	9,285	26,361
Totals	27,027	10,292	18,329	55,648

Source: Local Education Authorities 1999

If the centre attracts visits from only one school in twenty in this three county catchment, this will still constitute in the order of 80 class visits per annum - or two per week in term time.

Conclusion

The market for the project is very healthy and we have every confidence that very quickly the attraction could be drawing over 100,000 visitors per annum. This is a very substantial number for an attraction of this size in Wales.

However, we believe that this potential market can only be secured if the gallery is generally free to enter.

The average attendance for museum and gallery attractions in Pembrokeshire is in the order of 20,000. In light of the free-entry National Museum sites, free entry to the Cathedral, tendency among St Davids visitors to 'just walk around and go into the Cathedral' and recent experiences confirming the difficulty of charging for art galleries - we believe that charging would immediately cut likely visitor numbers from c100,000 to c20,000 and that this would still load a financial risk on the business plan.

Our view is that full integration with the Visitor Centre as a free element in its provision will not only maximise visitors (including new additional visitors to the city) but will also minimise net management and life-cycle costs, as discussed in the next section.

As with other free entry attractions, a voluntary donation scheme may be operated, and experience elsewhere suggests that where the experience is of high quality and appeal to visitors, some not inconsiderable income can be raised in this way. Nonetheless, it cannot be predicted with certainty and the decision to go forward with the project should not be based upon projections of donation income.

There will be many opportunities to extend the very successful merchandising carried out by the Visitor Centre, and to charge for workshops, education services, materials and resource packs, and these will offset operating costs. There may be opportunities to charge for some shows at peak times of year, but we recommend year-round free entry if at all possible.

DCA

A new gallery and attraction for St Davids

Final Report

4. Staffing, sustainability, management and realisation

Governance

We have considered a range of options for the governance and management of the extended centre. The functions of the centre combine both specialist heritage/art curatorial aspects and considerable amounts of visitor management and tourism information building on the work already undertaken by the PCNPA staff of the Visitor Centre.

The physical layout of the proposed project will need to be designed so as to ensure the greatest degree of supervision by a small staff, and in light of the overall intention of free entry to the exhibition elements, a relatively seamless and free-flowing arrangement will therefore be advantageous. In this arrangement, staff of the main reception point can carry out visitor reception and information tasks whilst offering a degree of supervision to the exhibition areas.

This approach, taken with the advantages of creating a single, seamless experience for visitors, and of maximising the degree to which all audiences use visitor services and enjoy the exhibition experience, demand an integrated management and operation for the whole attraction.

The establishment of a separate operating entity (probably a Trust) for the exhibition elements alone, operating independently from and alongside the PCNPA Visitor Centre management structure, seems to us a problematic concept. The new Trust would be flimsy in staff terms, and would lack financial underpinning (both in terms of sustainability and potentially cashflow), unless by way of contracted direct support from the principal partners.

It is difficult to see that such a small Trust, with no institutional framework, could offer a secure recipient for loan of the Sutherland and other NM&GW collection material, or command a viable position in the visual arts community. Our experience of other developments is that there is also significant potential, where independent organisations share one integrated building and visitor facility, for failure to act in close coordination over issues of building use planning, visitor information and customer care and relationships with outside agencies such as schools and partners.

We would argue, therefore, that there are pressing arguments for management and governance to be vested in a single integrated body.

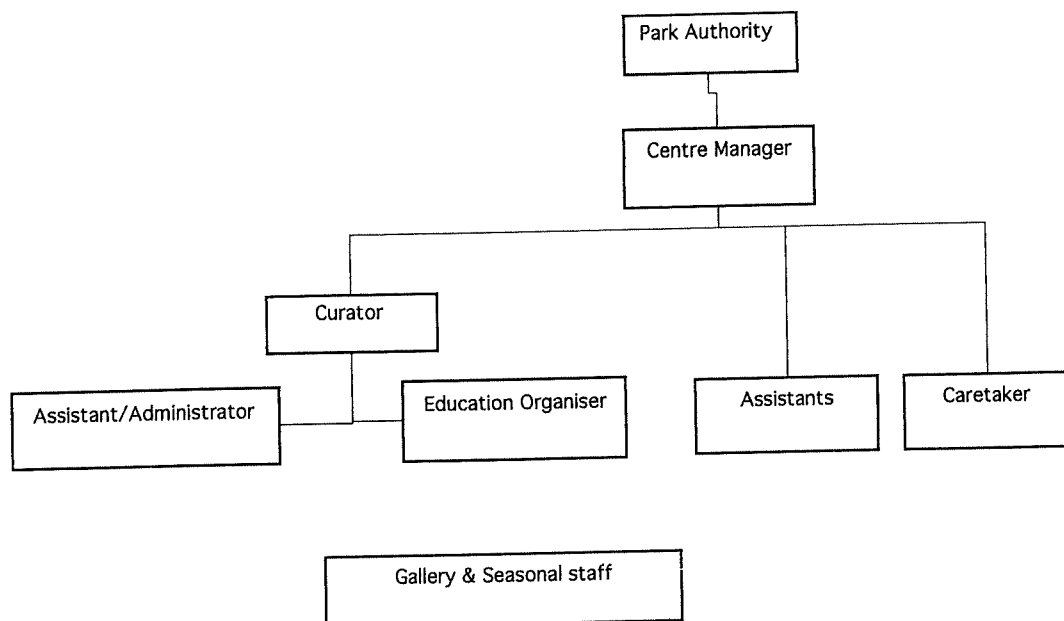
The role of the Visitor Centre as it currently operates will continue to be crucial, and the skills and experiences of the team who run it will be crucial to the success of the new venture. The best and most efficient way of delivering the building operation and visitor management functions would be to integrate them with the Visitor Centre, which is well managed and organised and which has a complement of staff who, whilst busy, can contribute to the supervision and general cover of the new element of the centre.

Whilst it might be possible to transfer the current Visitor Centre operation into a new independent trust that would then be augmented in skills and staff as discussed above, to run the overall operation, we would advise that the creation of a new ownership and management body of this sort is unnecessary and would be disadvantageous. The skills, experience and resources in visitor management and information that will be so crucial here exist in the current staff team and in the Park Authority more generally in their back-up to the on-site team. Nor does there seem a convincing argument for attempting to establish management of part or all of the operation by the National Museums & Galleries of Wales, Pembrokeshire County Council, or other bodies - and it should be said that these two institutions in particular have indicated that they could not take on direct management responsibility for the operation.

Logically, then, the new centre integrated with the existing visitor services and functions, comes under one new management structure and is operated by PCNPA.

Staffing

If the new centre is managed as an integrated element in the PCNPA management of the visitor centre, then a integrated staff team becomes possible. The form of integration of the new staff roles alongside current staff will need careful consultation and detailing prior to commencement of any recruitment to new posts, nevertheless, an appropriate and economic extended staff complement can be projected as follows:



Current staff

- Centre Manager
- Assistant
- Caretaker
- Seasonal staff

Additional staff

- Curator
- Assistant/administrator (20 hours)
- Education Organiser (fee based or on secondment from education authority)
- Extra seasonal and casual staff
- Café staff

The key new post will be the role of Curator, reporting to the Centre Manager (whose own role will be enhanced) and taking responsibility for the programming and realisation of the exhibition programme. This role (with a salary of c£22,000) will be best suited to a young curator with a particular interest in art and nature. We have seen a range of other such posts filled successfully. In order, however, to be able to deal properly with the Sutherland-related elements of the programme, it is likely that the post-holder would have to rely on support from the keeper of art and colleagues at NM&GW, and for specialist background knowledge on the Friends of the Sutherland Collection.

It seems to us that the St David's City Council, the steering group and the Friends of the Collection could all be brought to support the work of the staff team

through guidance, assistance with marketing through joint initiatives and potentially through voluntary involvement in guiding, research and education activities.

Sustainability, finance and operation

The difficulty, of course, is in reconciling free entry with the costs of running even a lean organisation. The revenue budgets set out over the coming eleven pages from page 33, show however, that this can be achieved. Broadly income on page 1 and expenditure on page 5 of the sheets (page numbers toward the top left hand corner) show two years prior to opening - the first, this year, showing current activity and the second, from April 2004, showing the additional resources necessary to recruit staff, prepare for opening and book programmes. These extra costs in the year prior to opening are likely to eligible capital costs on the basis that the involve preparations for launch of the capital project and have therefore been charged to the capital plan. The six years of income on pages 2,3,4 and expenditure on pages 6,7,8 include summary lines for staffing and for activity budgets which are themselves further analysed on pages 9 and 10. The annual outturn is summarised on page 11.

The key assumptions are discussed in the following table:

Heading	Assumption
Income	
PCNPA and NM&GW	The nature and extent of potential commitments from PCNPA and NM&GW will be further discussed and detailed during the next phase of development of the project. At this stage, NM&GW's contribution will be likely to form part of their overall partnership structure through which they will work with selected partner galleries across Wales. The precise details of this contribution, and of the funding of the partnership strategy, are currently under discussion. In the case of PCNPA, it is acknowledged that the resources of the Authority are subject to competing pressures. It may be that the Authority will wish to see any increase in subvention funded by additional incoming resources to the Park. It seems to us that there will be substantive arguments at a national and regional level in favour of realising and properly resourcing the project and that it is

	therefore possible to see ways in which the extra resources required can be found without detracting from the other work of the principal partners.
Hire of facilities	This is a modest increase over current levels of income given that the new facilities will include two new useable multi-purpose/meeting spaces at a larger size than that which exists currently. The target should be the responsibility of the Centre Manager.
Sponsorship and donations	We have limited this budget to a very modest amount, given the limitations on sponsorship available in the St Davids area. Nonetheless, we believe that there may be continuing opportunities for support for the work on Sutherland and for community and education oriented work. The target should be the responsibility of the Curator.
Programme	The detailed assumptions for activity and exhibitions are set out in page 10 of the spreadsheets. Entry is free, with small payments (net of VAT here) for education and participative activities. The key income assumption here is that £30,000 will be raised for investment in the exhibition programme. This will be by application to funders (ACW, local authority, Wales Arts International, WTB, Cywaith Cymru residencies schemes and others) - probably around six successful applications across four temporary exhibitions yielding an average of £3-4,000 each; three successful applications to trusts and foundations (a number support the visual arts and heritage and others support art/science projects) in respect of the Sutherland space renewals and temporary exhibitions, yielding c£2,000 each.
Visitor Services Commissions	We have assumed a small increase in commissions due to slightly enhanced overall levels of use, and dwell in, the visitor centre.
Shop Sales	The Visitor Centre has experienced good growth in shop sales, although the current space is not ideal. The new centre will enjoy better space, the

	<p>opportunity to merchandise in support of the temporary and permanent exhibitions and to groups of users such as school groups. The longer 'dwell' in the centre of visitors, particularly their use of the café, will encourage more to make shop purchases. There may also be improved opportunities to sell art and craft items related to, or shown in, the exhibitions in the main gallery. Overall, we have assumed an increase in turnover of around 35%. At this stage we have assumed a constant margin - though it may be possible to drive this up as turnover increases.</p>
Education Organiser Salary	<p>Discussions at various stage of the project have indicated that it might be possible to bring Pembrokeshire County Council into the revenue partnership. At some stages it has been discussed that this might be in the form of a secondment of a teacher to act as education organiser for the centre. We have assumed here, therefore, that the post is covered by the County or other partner. If the County become a cash partner instead, this line will need to be cleared. If no partnership support for this post is forthcoming, a half time salary at minimum will have to be allowed and covered by lower investment in programme and activity budgets until education income can be increased from the subsidised levels set out here to contribute more fully to the costs of the post.</p>
Café income	<p>Catering assumes that the centre has a café as specified and envisaged by the architects. At this stage we suggest that the café is operated in-house by the visitor centre. In order to calculate the net yield shown here we have assumed that one visitor in four of a total of 120,000 visitors per annum makes a purchase, averaging £2.50 (less VAT in the figures shown here) and that the surplus of income over costs (limited to staff, food/drink stock and consumables) runs at 20%. These are conservative</p>

	assumptions. It may be possible to drive up penetration (how many people buy things) and the profit margin (given that all premises costs are covered elsewhere in the budget). The average spend figure reflects a menu restricted to beverages and light food - baguettes, sandwiches, soup, cakes, teas, etc.
Expenditure	
Staffing	Staffing structures are discussed in the foregoing section. NI is allowed here at 11% on all costs and, in the case of casual and part time staff, there may be some saving in this respect. 2% contingency is allowed for holiday/maternity cover. Café staff are taken up in the café net income line, though will be useful in extending staff presence and supervision and should be capable of moving between shop/reception and café if required.
Premises costs	These are determined by current levels of cost increased in line with the larger building and, in the case of utilities costs, by the demands of lighting and interactive devices.
Supplies and services costs	Larger allowances are made for a number of items than is currently the case for the visitor centre. Costs of telephones, postage and travel and subsistence will be increased by the need of the gallery operation to be in very regular communication with a network of other galleries and providers.
Marketing costs	The marketing budget allowed here will be complemented by the considerable exposure of the centre and programme in the marketing carried out by the National Park Authority, marketing by internet and inclusion in County and Regional marketing initiatives. The budget here is reserved principally for flyers for exhibitions and events.
Irrecoverable VAT	Galleries often generate irrecoverable VAT, particularly in the case of permanent exhibitions. It may be that this issue will be resolved by the overall approach and registration of the Park Authority, but it may also be that the Customs &

Excise will want to deem some VAT on expenditure in respect of the permanent exhibition (in particular) as irrecoverable. Classic ways round this are:

- Charging for admittance (which we do not advise as discussed above - but which might be charged on occasions for particular shows and which would therefore remedy the irrecoverability)
- Charging for the sale of items from the exhibitions (which should be possible to incorporate into the programme)
- Allocation of costs predominantly to items where input tax is taken through charging (space hires, café, shop, hires of space, group and education visits).

In the case of Horizon, the issue is minimised by the relatively low VAT-bearing expenditure associated with the permanent exhibition. The allowance suggested here would deal with irrecoverability of VAT on 25% of all standard-rated expenditures.