

REPORT OF VISITOR SERVICES MANAGER (WEST PEMBROKESHIRE)

SUBJECT: ORIEL Y PARC – FUTURE PRIORITIES

Purpose of Report

To update Members on future priorities for Oriel y Parc as captured in the attached business plan.

Introduction/Background

In Summer 2019 the Director of Countryside, Community and Visitor Services commissioned 'Planning Solutions Consulting Limited' to draft business plans for the three centres across the National Park; Carew Castle, Castell Henllys and Oriel y Parc.

Business plans were drafted in partnership with the centre managers and included a staff and volunteer survey as well as a staff consultation meeting led by the consultant. The Service Director and Finance Manager were also consulted.

Summary

The business plan outlines the current tourism environment in Wales both economically and politically, it sets the scene for Oriel y Parc within the wider tourism sector of Wales and the UK.

The plan highlights the increasing pressures on government funded organisations to become more sustainable and emphasises the need for Oriel y Parc to remain contemporary in order to increase both visitor footfall and spend.

The document summarises Oriel y Parc's visitor figures and financial profile as well as the results from staff and volunteer consultations, compiling a brief SWOT analysis from the findings. This was then used to create the vision, aims and priorities for Oriel y Parc over the next three years.

The predominant conclusion from the findings is that the site would benefit from a package of investment that re-positions and re-brands Oriel y Parc as a National Park Discovery Centre with services and facilities to inspire people of all ages to explore the landscape, history, culture and heritage of the National Park.

In doing so, Oriel y Parc will be better aligned with 'park purposes' as well as attracting new, larger and more diverse audiences to the site and the wider National Park in-line with both PCNPA's Corporate Plan and the evolving Destination Management Plan (DMP) for Pembrokeshire.

In addition, the plan also outlines further priorities including the following areas:

- site presentation

- commercial developments
- visitor intelligence.

The business plan finishes with recommendations regarding monitoring and evaluation.

Conclusion

The Authority will utilise the plan to inform the operational direction of Oriel y Parc over the next three years and will be working with Members, staff, volunteers and key agencies (including *Amgueddfa Cymru* – National Museum Wales) to further enhance Oriel y Parc's position as one of Wales' most popular visitor centres.

Recommendation

Members are invited to note the plan and make any suggestions regarding the future priorities of Oriel y Parc.

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ORIEL Y PARC



**Pembrokeshire Coast National Park Authority
Visitor Services**

ORIEL Y PARC

**Business Plan
Winter 2019**



Parc Cenedlaethol
Arfordir Penfro
Pembrokeshire Coast
National Park

Pembrokeshire Coast National Park Authority

Visitor Services

Oriel y Parc

Business Plan

Winter 2019

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1. Introduction

The Business Plan sets the priorities and direction of travel for Oriel y Parc over the next three years. The Plan outlines the operational priorities to support the various aspects of the Visitor Centre particularly its contribution to the duties of the PCNPA whilst at the same time increasing audiences and growing income streams to make the site, programmes and activities more financially viable within the timeframe of the Business Plan.

The Business Plan outlines the vision and strategic focus for Oriel y Parc. It is a living document, which will be reviewed and up-dated in line with emerging priorities and opportunities. It is a shared statement of intent, providing the operational and actions framework for the Site Manager, core staff and volunteers responsible for operating the site.

The Business Plan also sets out how we will continue to evolve Oriel y Parc as a facility and asset that is forward looking and fit for the future. The Business Plan will provide the framework for the Annual Plan, linked to the financial and human resources required for the centre.

Similar Business Plans have been prepared for Carew Castle and Castell Henllys to ensure that a consistent approach is undertaken to conserve and develop the assets, maintain and extend the audiences who enjoy them and protect and enhance the income earned through them.

The Business Plans provide the operational framework for Visitor Services at the PCNPA to maintain the sustainability and interdependence of the three visitor services sites through:

- **Conservation:** preserving and promoting the unique environment and heritage of the National Park
- **Customer care:** constantly improving the visitor experience
- **Commercial development:** remaining competitive and maximising income-earning opportunities.



2. Strategic Context

The Business Plan aligns with the national and operational policy framework, which is outlined in the diagram on page 5. The National Park Management Plan, which is currently under review, guides the management of the National Park in order to achieve the twin statutory purposes of:

- To conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park;
- To promote opportunities for the understanding and enjoyment of the special qualities of the National Park.

National Park Authorities' primary responsibility is to deliver their statutory purposes and in doing so, be exemplars in achieving sustainable development, helping rural communities to thrive. Both these purposes contribute to the duty of the National Park Authority (NPA) to seek to foster the economic and social well-being of local communities within the national park area.

The National Park Management Plan sets the overall vision for the National Park:

The Pembrokeshire Coast National Park is an enviable year-round visitor destination and an inspiring and welcoming place to live, work and play, drawing on its strengths: welcoming people, great food, stunning landscapes, bountiful access to the coastline and water, wildlife-rich countryside, a rich and colourful history, and peace and quiet.¹

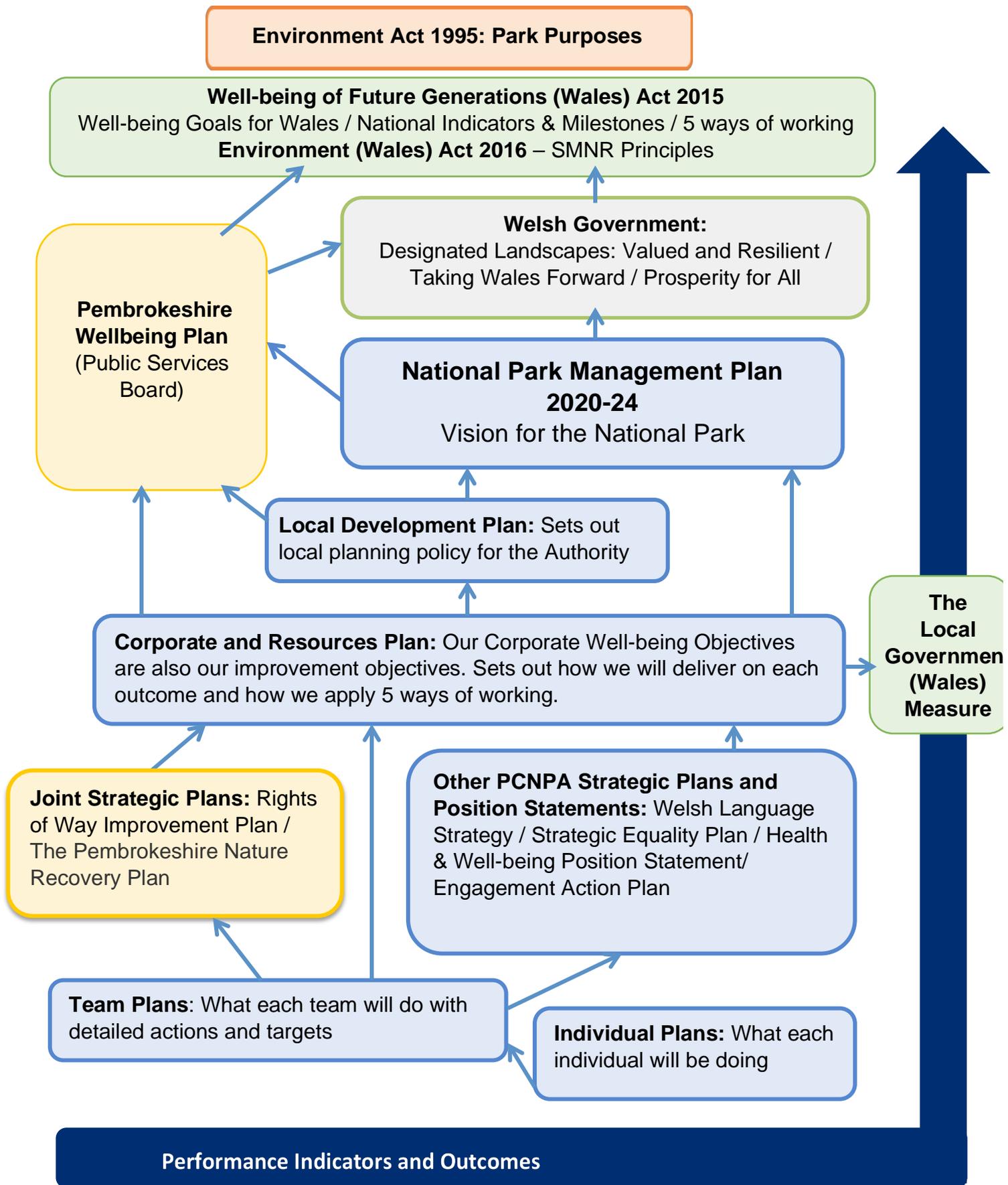
The PCNPA has seven Well-being Objectives, which contribute to the Welsh Government Well-being Goals². The Management Plan will pursue National Park purposes through partnership action across five complementary themes:

- A Natural Asset: A landscape for life and livelihoods
- Landscape for Everyone: Well-being, enjoyment and discovery
- A Resilient Park: Protecting and restoring biodiversity
- A Place of Culture: Celebrating heritage
- Global responsibility: Managing natural resources sustainably.

Oriel y Parc makes a positive contribution to delivery of the second statutory purpose, promoting opportunities for the understanding and enjoyment of the special qualities of the park by the public and its Well-Being Objectives.

¹ PCNPA Management Plan 2015-2019

² Well-Being of Future Generations (Wales) Act 2015



The visitor economy makes a substantial contribution to Pembrokeshire, generating significant visitor expenditure and supporting a substantial number of jobs. Pembrokeshire's outstanding natural environment, coupled with strong elements of cultural and historic heritage, is its main strength as a tourist destination. The Pembrokeshire Coast National Park provides a stunning coastal setting for escape, adventure and relaxation.

Supporting a thriving visitor economy and developing a sustainable visitor experience that is of high quality, authentic and enables visitors to appreciate the area's outstanding natural and cultural heritage is a key priority for the National Park Authority. A key objective of Visitor Services is to give people the opportunity to understand and enjoy its special qualities through supporting and providing high quality and unique experiences for visitors within a stunning landscape. The three centres, Castell Henllys, Carew Castle and Oriel y Parc, provide distinctive offers for people of all ages to explore the landscape, history, culture and heritage of Pembrokeshire. They tell an important part of the National Park story particularly the connection between people and place. The Centres play an important part in protecting and promoting cultural and historical activities across the Park.

The years ahead represent a period of potential change, challenge and opportunity. The National Park Authority faces growing and sometimes conflicting demands to deliver conservation, public access, local employment and affordable housing, at a time when resources are being constrained. With declining grant support, considerable efforts are being undertaken to increase income generation within the Pembrokeshire Coast National Park Authority.

The three visitor sites require financial support. An important driver of the Business Plans is to reduce the subsidy per visitor, whilst at the same time recognising the direct and indirect economic benefits generated by the visitor services, events and activities and the broader social and environmental benefits of the service and facilities.

3. Tourism Context

National Economic Strategy

Under the new Wales Economic Strategy, Welsh Government has committed to support the four 'foundation' sectors of the Wales economy – tourism, food, retail and care - acknowledging that for some parts of Wales (including Pembrokeshire) the foundation sectors are the local economy. The connections between the foundation sectors and quality of place have important economic impacts including the interrelationship between a strong retail offer and tourism. The plan commits WG to promoting Wales through:

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

National Tourism Strategy

The context for tourism in Wales is set by the national strategy 'Partnership for Growth' (P4G) developed by Visit Wales (VW) in consultation with industry and destination stakeholders and implemented from 2013. P4G set a growth target of 10% in real terms by 2020. By 2016 growth was moving well ahead of target and refocused Visit Wales' own investment priorities, including the following, in support of the 'This is Wales/ Gwlad Gwlad' brand,

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

VW is leading on integrated route-based experiences, the 'Wales Way', to give confidence to those unfamiliar with Wales (especially from overseas markets) and spread the economic benefits of tourism. The first of these will be the A487 corridor 'West Coast Way' which will begin (or end...) in Pembrokeshire. Also, to add focus, VW has been leading a 'Years of...' approach to marketing, 'soft' product development and communications with Adventure in 2016, Legends in 2017, the Sea in 2018 and Discovery in 2019.

Visit Wales has recently embarked on the development of a new medium-term action plan to succeed *Partnership for Growth*. The consultation process has identified a number of challenges and

barriers to growth which remain for the tourism sector in Wales, especially in comparison with key comparator destinations.

Visitors of the future – finding new markets to supplement existing loyal but relatively low-spending UK-based couples and families and driving business outside the traditional holiday periods to break the impacts of seasonality on sustainability, employment quality and reinvestment. The impacts of Brexit on UK and overseas markets remains a significant unknown factor.

International visitors – Wales currently attracts 1 million overseas visitors per year, who spend more and appreciate cultural distinctiveness, but is underperforming compared with the rest of Great Britain, despite the unique Welsh cultural offer. There are significant requirements in terms of training, skills, products and quality.

Meeting visitor expectations – satisfaction levels are high (9.2/10) but the quality, variety and sustainability of the visitor experience needs to meet the rising expectations of those not yet committed to Wales.

Focus – resources, public and private, are limited, so may need to ‘do fewer things better’. There is a danger that Wales is still seen as a ‘something for everyone’ destination, despite the successes of themed years (e.g. Year of the Sea, Year of Legends) and the ‘Wales Way’ approaches.

Community benefit – tourism cannot expect to receive unconditional support unless it can demonstrate more clearly the positive contribution it makes to community well-being, cohesion and culture.

Partnership – there are estimated to be 10,500 businesses directly engaged in tourism in Wales, alongside many public sector organisations and agencies with a significant influence. More progress is needed on effective joint working at community, destination and national level to optimise collective impact.

Digital – the ways visitors are accessing, booking, consuming, recording and assessing experiences and destinations are moving increasingly into the digital sphere. Wales as a destination is not yet making best use of the technologies available to learn more about visitors and manage destinations.

Quality – Wales has the raw materials for successful tourism – landscape, people and culture – but so have many other comparator destinations. Quality of welcome, service and experience are vital determinants and differentiators.

Communications and access – getting to and around Wales in quick, easy, sustainable and healthy ways should come as standard but how can tourism lead and influence the infrastructure decisions which allows this.

Sustainability – Wales is not yet suffering from over-tourism but visitors are now very conscious of the sustainable credentials of the destinations they choose.

Stakeholder consultations have only just finished so it is premature to speculate what the next medium-term tourism plan for Wales will look like. However, it can be safely assumed that tourism, insofar that it is led by Visit Wales, with support from other government departments, organisations and agencies, including local government at destination level, will need to acknowledge the opportunities and responsibilities inherent in the Well-being of Future Generations Act (2015). Indeed it is a sector that is in a position to make a significant positive contribution at community, destination and national level to each of the seven well-being goals.

It will be important for Oriel y Parc to align itself with the National Strategy and core brand values, particularly if there is a future opportunity to source Visit Wales financial support to develop the centre.

Pembrokeshire Destination Plan

The visitor economy is a key sector for the Park; £346 million was generated through visitor and tourism business spending within the Pembrokeshire Coast National Park boundary in 2017, supporting nearly 11,000 full-time equivalent jobs in the National Park and its economic influence area³.

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

The Pembrokeshire Destination Management Plan⁴ (DMP) is a business plan for building and managing the visitor economy for the county. The DMP is currently being refreshed and will present the information, learnings and priority actions to grow and develop the local visitor economy over the next five years. It is likely that a core objective will be to continue to strengthen the year-round appeal and accessibility of places to visit. Rather than the development of more, small attractions which will be competing with each other for a finite market, priority should be given to the provision of better all-weather facilities and strengthening the profile and appeal of existing attractions, especially encouraging longer out-of-season opening.

Castell Henllys and Carew Castle and Mill are important attractions within the county, bringing the history and heritage of the area alive for people living locally and further afield. Oriel y Parc plays a central role promoting the Pembrokeshire Coast National Park and the art and heritage of the area.

The National Park Authority is playing a central role in refreshing the DMP. Future development of the Centres will need to align and work within the DMP framework. It is critical that the centres continue to offer visitors a complete quality experience in terms of welcome, environment, heritage appeal, attractions, interpretation, events and infrastructure, which can benefit residents as well as visitors.

³ Tourism economic impact research undertaken for Pembrokeshire Coast National Park by Global Tourism Solutions (UK) Ltd.

⁴ Pembrokeshire Destination Management Plan 2013-2018

4. Oriel y Parc

The site

Oriel y Parc Visitor Centre and Gallery is located in St Davids. The main National Park Visitor Centre was built in 2008 to form a semi-subterranean gallery, education rooms and café at a cost of around £4m. The building is innovative in design and operation using state-of-the-art green technologies to provide a comfortable and sustainable building; Oriel y Parc has been designed to use basic natural resources of the sun, rain and native vegetation to cut down on the use of power and processed water.

The centre is located on the A487 at the top end of the city. The free attraction is open all year, with some closures over the Christmas period.

Summer (March-October) 9.30am-5pm

Winter (November-February) 9.30am-4pm



The centre has a large car park, which accommodates 300 spaces (pay and display) and coach spaces and is on the main bus route to Haverfordwest / Fishguard. St Davids does not have a train station.

The current visitor offer includes:

The Gallery: home to Amgueddfa Cymru – National Museum Wales in Pembrokeshire, which displays works of art from the national collection, with exhibitions drawing inspiration for Pembrokeshire's incredible landscapes. The gallery at Oriel y Parc is a partnership between the National Museum Wales and the PCNPA.

Visitor Centre and Shop: providing information and advice to visitors including offering a bed booking services. Oriel y Parc has a large retail area providing a range of branded and un-branded goods.

Discovery Room / Artist in Residence Studio: studio space to allow artists to take inspiration from the beauty of the National Park landscape and work with local groups and schools to create original pieces of art.

Café: approximately 45 internal covers operated under a franchise operates the café under a 5-year agreement (new concession commences in November 2019). There are also a number of additional covers within the external courtyard.

Oriel y Parc also provides room hire on a per hour, half-day or full day basis (Discovery and St Davids rooms).

Enclosed within the arc of the building is a formal courtyard, in the centre of which lies the St David's Day Stone. A path leads through an arch between the centre and the tower into the woodland garden, which provides access to the city centre and Cathedral. Within the grounds, there is also a small, quiet picnic area. The outside space includes public toilets.

The Centre provides a comprehensive school visits programme, particularly linked to learning about the National Park through the arts and the work of artists. School visits can be combined with National Park Ranger-led activities or with a visit to St Davids Cathedral or the Bishop's Palace.

The visitor experience

Sense of arrival and welcome: The main visitor route tends to be from the car park, across the road into the main courtyard. The architecture is designed to allow people to "find their way" naturally through the centre down to St David's city. The courtyard is an impressive open-space but does accommodate a large number of information boards about various services and facilities. Signage is low key as is the main entrance into the centre.

Key stories / narrative: Oriel y Parc is the 'physical face' of the National Park; its role is to deliver visitor information and to help visitors (and local people) discover the National Park. The Gallery is a unique collaboration between Amgueddfa Cymru and Pembrokeshire Coast National Park Authority, in which services for visitors are joined by displays from the national collections to celebrate the landscape. The Authority has renewed the partnership arrangements in relation to the Gallery to develop a 3-year programme of exhibitions that meets audience needs and the strategic aims of both organisations

Special qualities: Oriel y Parc provides a diverse product in an outstanding built and natural environment. The Gallery and its changing programme of exhibitions provides an important resource to discover the landscapes of Pembrokeshire. There is a particular focus on the artist Graham Sutherland as well as support to other artists through the Artists in Residence programme.

5. The market and visitor profile

Oriel y Parc yearly footfall is in the region of 130,000 and is reflective of the seasonal pattern and character of the wider St David's visitor market.

Table 1: Visitor Numbers (Calendar Year)

Calendar Year	2013	2014	2015	2016	2017	2018
Oriel y Parc	144,966	147,291	134,228	147,314	128,882	125,551
% increase/decrease	9.83%	1.6%	-8.87%	9.75%	-12.51%	-2.58%
OYP Gallery	31,725	29,149	25,116	43,718	23,808	20,864
% increase/decrease	-0.65%	-8.12%	-13.84%	74.06%	-45.54%	-12.37%

The display of John Constable's 'Salisbury Cathedral from the Meadows' was a major draw and led to the spike in visitor numbers in 2016. The weather has a big part to play in terms of visitation patterns to Oriel y Parc; hot summers encourage greater visits to the many beaches in Pembrokeshire.

Pembrokeshire has traditionally attracted loyal older visitors although greater wealth and more diverse adventure products has broadened the visitor base. The family market continues to be the key market segment for the centre.

The Visitor Centre has achieved an overall 4.5/5 rating on Trip Advisor, with positive comments on the standard of service particularly in terms of information provision.

The lack of information and intelligence on visitors, including market segmentation, is an issue that needs to be addressed. Good market research needs to be conducted to determine the demographics of the visitors, their needs, their favoured activities etc.

6. Financial profile

The table below summarises the subsidy required to manage and operate Oriely Parc and Gallery for 2010/11, 2015/16 and 2018/19.

Table 2: Oriely Parc Financial Profile

	2010/11	2015/16	2018/19
Operating Deficit	170,000	149,000	149,000
St David's Café	-9,000	-8,000	-21,000

The Actual YTD profile shows a slightly lower figure for 2018/19 due mainly to salary savings due in part to the late appointment of the new Site Manager.

Oriely Parc has reduced the level of subsidy and it is hoped that a new café operator will provide a more regular income stream for the centre.

During the financial year 2018/19, the main expenditure items (budgeted) include:

Table 3: Oriely Parc Budgeted Expenditure 2018/19 – core items (above £3k)

Salary – APT&C (including on-costs)	167,762
Salaries – seasonals (including on-costs)	18,873
Utilities	18,113
Rates	20,046
Merchandise Purchases	80,289
Exhibitions	3,215
Telephone / Fax	3,405

Unsurprisingly, the main costs are on staffing, which is summarised below.

Table 4: Oriely Parc Staff

Oriely Parc	
Full-time	5
Part-Time	2
Casuals	4
Temporary / seasonal	2

Oriely Parc and Gallery is a free attraction so does not generate an admission fee. The main income sources are summarised in the table below.

Table 5: Oriel y Parc Budgeted Income 2018/19 – core items (above £3k)

Merchandise Sales	123,069
Hire of facilities	4,147
Activities and events	8,198
Exhibitions income	9,000
Donations	2,102
Bed bookings	2,081

The shop performs well generating in excess of 50% of all merchandise sales across the three centres. The vast majority of visitors to the Centre park at the St Davids Car Park, which secures an income of over £70,000, which is not accounted within Visitor Services.

A fairer reflection of the cost of Oriel y Parc is demonstrated by looking at the subsidy per visitor, which takes into account income, cost and spend per visitor. This is summarised in Table 6.

Table 6: Oriel y Parc Subsidy per Visitor

Financial Year		2015/16	2016/17	2017/18	2018/19
Oriel y Parc					
	Visitor Numbers	136,704	141,048	127,205	129,004
	Net Income	134,054	139,389	145,910	158,775
	Net costs	150,475	156,657	196,002	149,213
	Spend per visitor	0.98062	0.98824	1.14705	1.23078
	Subsidy per visitor	1.10074	1.11066	1.54084	1.15665

The subsidy per visitor represents how much subsidy PCNPA provides in order to generate one attendance. Although high, it is comparable when benchmarked against other similar attractions, particularly arts-based attractions where the total subsidy per attendance for all artforms is in the region of £6.05⁵.

⁵ National Portfolio Organisations Annual Submission to Arts Council 2016

7. Staff and volunteers consultation and Strengths, Weaknesses, Opportunities and Threats

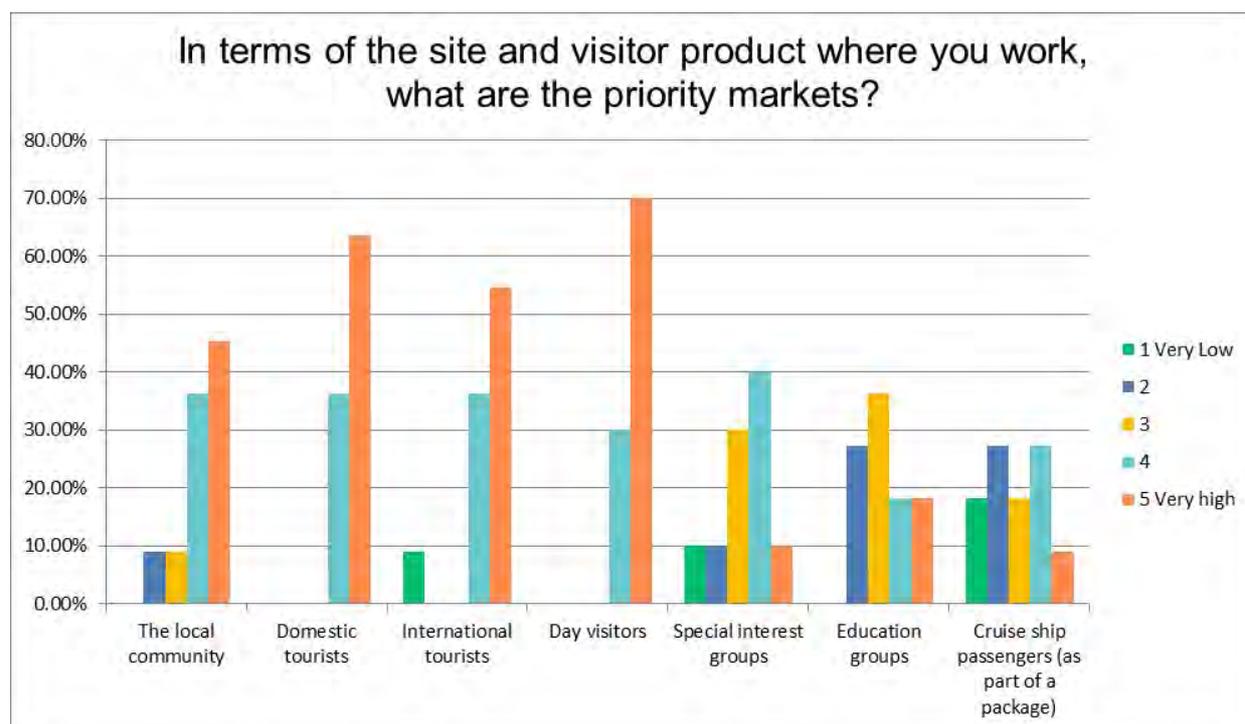
As part of preparing the Business Plans, a module of research was carried among staff and volunteers working at each of the centres.

- Carew Castle, 11 surveys completed
- Oriel y Parc, 11 surveys completed
- Castell Henllys, 6 surveys completed

The results for Oriel y Parc are summarised below:

Who are our priority markets?

The market segments which generated the highest priority are identified in the table below. Just under half of people who answered gave members of the local community a very high priority. This figure increases for day visitors to 70%, domestic tourists to 63.6% and international visitors to 54.6%.



The current offer

Staff and volunteers were asked to rank elements of the current visitor experience and the wider offer. The results are summarised below. Positive results are shown in green and areas which generated a poor or average response are highlighted in red and orange respectively.

	1 Very poor	2	3	4	5 Very good
Arrival / sense of welcome	0.00%	0.00%	9.09%	36.36%	54.55%
Signage	0.00%	36.36%	36.36%	27.27%	0.00%
Interpretation	0.00%	36.36%	18.18%	36.36%	9.09%
Car parking	9.09%	9.09%	27.27%	36.36%	18.18%
Retail offer	0.00%	0.00%	36.36%	45.45%	18.18%
Catering offer	0.00%	18.18%	45.45%	36.36%	0.00%
Events infrastructure	9.09%	9.09%	36.36%	36.36%	9.09%
Marketing	0.00%	18.18%	54.55%	27.27%	0.00%
PCNP brand awareness	9.09%	45.45%	36.36%	9.09%	0.00%

Future opportunities to [enhance the visitor experience](#) were identified by staff and volunteers:

- Card payment and ability to accept notes on car parking payments, including a cash point within the visitor centre
- Enhance interior and exterior signage
- Enhance provision of information and interpretation (including more information on the National Park). This also includes using 'expert local' knowledge which the staff hold
- Improved flow of visitors across the courtyard
- Enhanced marketing activities, including raising awareness of the partnership with NMW
- Develop and diversify the events, exhibitions and programmes.
- Improved maintenance of the grounds

There are some wider operational considerations including maintenance of the building, which is now 10 years old, investment in staff training, the capture of feedback from visitors and improving the system used in terms of events booking systems.

Opportunities to [increase visitor numbers](#) had a strong focus on improving the use of marketing including social media, to help raise awareness of Oriely Parc and developing the visitor experience. The use of external signage (e.g. in the city) to raise awareness of the centre and events should be considered as part of the promotional strategy along with working in partnership with other attractions e.g. the Cathedral, boat trip companies and cruise liner companies. The introduction of both high profile and locally focussed exhibitions will help to raise awareness of the centre and events could be improved to engage with new audiences. It is felt that there are also opportunities to enhance the catering and retail offers (catering was mentioned a number of times).

Opportunities to [increase income generated](#) at Oriel y Parc focussed on increasing the number of appropriate events; the Lighthouse Walk and Brilliant Bats were mentioned. The development of the differentiated retail product including sale of branded clothing will help to ensure the offer is distinct within the marketplace. The catering offer could also be improved to boost conversion and spend levels. A further option is to consider the introduction of a potential admission fee to the Gallery and make more use of the Discovery Room and hire of spaces e.g. pop up shops during holiday period to generate a hire fee. There may also be the opportunity to extend opening hours into the evening (although staff resourcing may be an issue).

It should be recognised that there are [challenges and constraints](#) which the centre faces. Concern was raised about limited staff resources with a reported issue of low morale and staff retention. To some degree there may be a lack of wider understanding across PCNPA of the site and its aims. It was also felt that staff could be more empowered to make decisions that they believe will enhance the visitor centre. This will hopefully be enhanced by the recent appointment of a new a manager at Oriel y Parc.

There is also limited data held on visitors which impacts on marketing plans and developing a future visitor experience plan. Consultees also felt that they have limited time available to think about designing and promoting the visitor offer

The design of the visitor centre also places restrictions on the visitor offer. Other barriers include the IT available and perceived lack of cross-team support from HQ

Summary SWOT

<p><u>Strengths</u></p> <ul style="list-style-type: none"> • A fantastic building with good car parking provision • Gateway to St Davids (location) • Diverse range of visitor services • The Gallery provides an important link to the unique cultural and artistic assets of the National Park • Large retail space • Café and toilet facilities • Energy, commitment and knowledge of staff • High quality of information service • Support of NMW and Friends of OyP 	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> • Reliant on a significant subsidy to operate • Staff retention • Communication with HQ • Lack of clarity regarding the core visitor product offer at OyP • Limited information and intelligence about visitors (profile, origin, segment) • Seasonality of demand • Poor signage, especially from the town
<p><u>Opportunities</u></p> <ul style="list-style-type: none"> • Ability to utilise new National Park brand • New website • Forecast growth in domestic and inbound markets • Growing market interest in experiences, environment and wellbeing • New café operator (from November) • Opportunity to use space in the centre differently 	<p><u>Threats</u></p> <ul style="list-style-type: none"> • Reduction in funding • Concentration of visitor numbers/pressures at certain times of the year • Competition from other attractions and destinations • Reduction in services provided by NMW over time

8. Vision, Aims and Operational Priorities

As well as being an important attraction and venue for St Davids, Oriel y Parc is a key resource for the National Park. The iconic building accommodating the gallery, café, retail space and flexible learning and creative spaces, provide an important gateway to the city and coastal peninsula. The gallery, designed and operated in partnership with the National Museum Wales in Pembrokeshire, showcases the creativity and landscapes of Pembrokeshire and beyond.

However, there is a general feeling that more needs to be done to present Oriel y Parc as the discovery hub for the National Park. There is a need to re-position and re-brand the site as the National Park Discovery Centre with services and facilities that excite and inspire people of all ages – including the family market – to explore the landscape, history, culture and heritage of the Pembrokeshire Coast National Park.

Vision

The overall vision is to operate Oriel y Parc as one of the leading attractions in Wales attracting new, larger and more diverse audiences to the National Park. Oriel y Parc will be the physical and visible National Park Visitor Centre enhancing peoples' experience of the National Park and supporting the county's visitor economy. The Centre will encourage visitors to discover more about the National Park particularly the area's culture, art and natural heritage.

Core Aims

- a. To inspire people to discover, value and conserve the Pembrokeshire Coast National Park: its landscapes, culture and heritage
- b. To make the collections of Amgueddfa Cymru – National Museum Wales available to view in Pembrokeshire
- c. To provide an appropriate setting in Pembrokeshire for the displays of material from the Graham Sutherland and other collections
- d. To link the wider Pembrokeshire landscape, culture and heritage with a unique learning experience and make this accessible to diverse audiences
- e. To support local communities and the local economy including arts, education, local business and tourism communities in the St Davids Peninsula
- f. To provide a warm welcome and offer an exceptional information service to both visitors and residents alike.

Operational Objectives

- Increase visitor numbers by 5% by 2022
- Increase length of stay
- Increase visitor spend by 5%
- Strengthen PCNP as a unique coastal destination
- Help sustainability of the Visitor Centre by reducing subsidy to £1.00 per visitor by 20220
- Enhance the visitor experience

9. Work Programme

(* Timeframe: **short** = up to 12 months; **medium** = 1 - 3 years; **long** = 3 years +)

Conservation: preserving and promoting the unique environment and heritage of the National Park		
Action	Description	Timeframe
Re-fresh and re-position Oriely Parc as the visitor centre and hub for the PCNP	Develop an interpretation action plan to better present the PCNP within the centre and 'set the scene' for visitors to discover the National Park	Short
	Assess the opportunity of developing a permanent discovery exhibition on the landscape, culture, ecology and heritage of the National Park	Short
	Implement interpretation action plan	Medium / Long

Customer Care: improving the visitor experience		
Action	Description	Timeframe
Site presentation	Ensure that site presentation and general 'housekeeping' is improved to deliver a quality and sustained presentation of the site to visitors	On-going
	Consolidate the plethora of information boards in the courtyard to better present the outside space	Short
Arrival and orientation	Review and develop proposals to up-grade signage to Oriol y Parc from major transport routes (including the city centre)	Medium
	Develop a Public Realm and Wayfinding strategy that would create place distinctiveness, highlighting key walkways with narrative and increase the sense of connectivity between key gateways	Short
	Review the 'digital experience' that would utilise personal smart phones and tablets	Medium
	Assess options for improving connection between the car park and entrance to inspire and bring a sense of excitement to visitors to the Centre	Short
	Improve the visual invitation and welcome to encourage entry into the Centre through improved entrance and signage	Short
Enhanced picnic area	Assess options to introduce low impact children's play area within an enhanced landscaped outdoor picnic area	Medium
Collaboration with NMW	Assess options for introducing a 'pay-to-enter' exhibition at the gallery	Short

Commercial development: remaining competitive and maximising income-earning opportunities		
Action	Description	Timeframe
Marketing Plan	Develop a local marketing plan for Oriel y Parc building on the new PCNP 'brand' and developing DMP	Short
	Continue to develop joint marketing and collaboration with partners in the St Davids Peninsula Tourism Group.	On-going
Quality catering concession	Ensure provision of a quality catering experience to meet the basic criteria for core facilities of a successful attraction in today's competitive marketplace when new concession is introduced in November	Short
Additional concessions	Assess the market opportunity to rent out available space to introduce new commercial concessions in to Oriel y Parc, e.g. cycling concession	Short
Private Hire	Develop an agreed policy / strategy for the hire of rooms including revising the pricing strategy for hire	Short
	Assess options for developing an events programme to utilise the courtyard, car park and outdoor space that will appeal to a wide audience and reinforces the traditional and contemporary themes relevant to the PCNP	Medium

Visitor intelligence and communication		
Action	Description	Timeframe
Visitor research	Conduct in-depth visitor surveys every 3 years (linked to Visit Wales visitor survey) to measure how the centre is perceived by visitors and to identify strengths and weaknesses	On-going
	Investigate a mechanism for ongoing collection of visitor feedback	Short
	Analyse customer feedback to develop strategic actions that address potential weaknesses	On-going
Communications	Arrange regular sessions (3 per year) with operational staff from the other two visitor sites to exchange ideas and investigate future collaboration	Short
Monitoring and Evaluation Plan	Develop a Monitoring and Evaluation Plan to assess performance in a consistent way	Short

10. Monitoring and Evaluation

Progress against the Business Plan will be monitored continually by the Site Manager and staff responsible for particular areas of work.

In addition, a Monitoring and Evaluation Plan will be designed, which will common across each of the three sites, to ensure that appropriate methods are used to measure the success of the site against Business Plan objectives using evaluation techniques. The plan will align with current performance measures used by the PCNPA, and will adopt the following principles:

- builds on current intelligence
- have a clear customer focus
- provide measurable evidence of success
- be flexible, responsive and cost effective

The approach to the evaluation will be a continuous programme of self- evaluation based on Participatory Action Research. Building on current performance management and communications platforms, management systems will be established to ensure that appropriate procedures are in place to carry out regular evaluations focussing on the effectiveness of the sites. The involvement of all staff will be crucial both in terms of understanding the evaluation process and defining roles and responsibilities.

The Monitoring and Evaluation Plan will set out a tiered approach, which will measure success in three ways:

- Monitoring contribution to specific headline performance targets (Performance Indicators)
- Evaluating impact and success of achieving strategic objectives and specific thematic outcomes
- Evaluating organisational and management outcomes and targets

Headline Performance Indicators

Although numbers will not, on their own, tell the whole story about the performance and success of the site, they do provide an important context and foundation for the evaluation. A (draft) set of 'headline' performance indicators has been generated (table below) to provide the basis of a baseline against which to assess change. These will need to relate to the operational priorities set out in section 8. The collection of baseline data information is an important element of the Evaluation Plan that will enable partners to measure the impact the Acton Plan is having, comparing the 'before' with the 'after'. The collection and analysis of baseline data relies upon the availability of adequate data, and on the extent to which information can be organised and managed to provide a convincing story about year-on-year changes.

Headline Performance Indicator						
Headline Indicator	Baseline	Yr1	Yr2	Yr3	Yr4	Method
Total number of visitors						Internal reporting on a quarterly basis
Total number of visitors from outside 60 minute drive-time						Internal reporting via ticketing system and visitor survey.
Total number of visitors in formal education (school) groups						Internal reporting on a quarterly basis
Average customer satisfaction rating of excellent						Internal collection via visitor survey / TripAdvisor rating
Visitor spend: café / retail						Internal reporting on a quarterly basis
Gross Turnover (total income)						Internal reporting on a quarterly basis (financial management tool)

The information is relatively easy to access and is available at least on an annual basis. The portfolio of measures will be agreed by Site Managers and reviewed on an annual basis to ensure that they continue to provide a clear picture of the principal trends and developments.

Evaluating impact and success of achieving specific thematic outcomes

The second tier of the Evaluation Plan will focus on both a quantitative and qualitative assessment of the impact and success of the site in meeting PCNPA strategic aims on conservation, participation, learning and socio-economic impact.

Visitor Surveys

It is recommended that PCNPA looks to partner / align visitor survey research at the three sites with the Visit Wales visitor survey to measure how the site is perceived by visitors and to identify strengths and weaknesses. This will enable data to be collected on visitors, including information on visitor characteristics, e.g.

- Age group
- Gender
- Ethnic background
- Socio-economic group
- Disability

Additional questions can be included in the core questionnaire to capture people's experience (satisfaction, safety, accessibility etc.) as well as opinions on a range of issues including the heritage experience through to issues regarding the standard of maintenance and upkeep.

In addition to the structured Visit Wales survey, more use should be made of self-completed questionnaires, which could be offered to all visitors to the sites. Consideration should be given to the use of incentives to encourage greater participation. The focus of the questions will be to gauge perceptions, opinions and ideas about the visitor experience.

A focus of the evaluation plan will be to assess the success of the site as a learning resource particularly to ensure that learning activities and resources appeal to a range of learning needs and reflect the curricula. The Education Officer will be responsible for designing and implementing a coherent programme of evaluation activities both targeted towards teachers, pupils and students. This will include:

- Pre-visit survey (self-completion questionnaire)
- Post visitor survey focusing on the relevance and appeal of the Learning Programme
- Follow up outreach visit to discuss learning experience