



Petersham Group Ltd.

Leisure Business Consultancy

August 2015

Petersham Group

Petersham Group is a specialist leisure consultancy working across the Experience Economy. Established in 2003, the business is run by its two founding directors - Jonathan Rounce and Keith Thomas - who jointly have over 65-years experience in the international leisure industry.

That extensive, 'hands-on' experience embraces both the development and the operation of museums, visitor attractions, family entertainment centres, historic & heritage properties, hotels and restaurants.

Our work is truly international. Over the last 5-years we have undertaken projects in Portugal, China, Kuwait, Estonia, Finland, Germany, Greece, Kenya, Malaysia, Mauritius, Vietnam, Egypt, Spain, Sweden and the USA, and extensively across the UK – a broad and dynamic base from which to identify emerging trends and to identify the benchmarks of success (and failure).

As specialist consultants to the leisure industry we work for local and national government bodies, commercial enterprises, developers and operators of museums and visitor attractions, architects, designers and a range of other entities across the private, public and not-for-profit sectors



Keith Thomas & Jonathan Rounce running a workshop in Lisbon in May 2015

What do we do?

What do we do? As advisors to the leisure industry and the wider Experience Economy our services are wide ranging but, when narrowed down to our most frequently called upon services, the majority of our assignments fall into one of the following categories:

- **Project management/attraction development;**
- **Operational consultancy;**
- **Options appraisals;**
- **Business planning & financial modeling;**
- **Funding advice & assistance;**
- **Master planning advice**

Working smart– our core focus is on advising on the funding, development and management of visitor destinations and attractions, helping clients and their advisers to translate ideas into viable leisure business propositions that meet their own aims and objectives , which interest, excite and inspire visitors and which are economically viable, efficient and cost effective to operate.

Working collaboratively – We frequently work alongside, or in teams, sometimes with architects & designers, sometimes with historians or researchers, sometimes with existing management teams. We may bring together and lead a team as project managers or we may sit alongside the client and their team, helping them to navigate their way through what is often a complex and unfamiliar process.

Our experience shows that it is essential to plan and define

what is needed first – setting out the basis of the master plan, the type of development or attraction sought, the fundamental aims and objectives of the project and of how it will be delivered and operated.

In parallel with this, carrying out Market Analysis to identify who will visit and in what numbers, and an Economic Feasibility Study should result in a robust business plan that is designed to secure funding for the project.

We also work with existing organisations, destinations and attractions, seeking ways in which they can operate more effectively and deliver memorable experiences to their visitors.

Our associations – we are also involved in a number of industry and professional bodies, either individually or as corporate members. In this way we belong to:



Staff Profile

Keith Thomas

BSc. Hons (Lond.)

Areas of Expertise:

- Development of projects from concept, through planning and design, to launch and into successful operation,
- Integration of leisure and entertainment components into complex master plans,
- The organisational and contractual structuring of leisure development projects.



Thumbnail Career:

2003 - Date;

Petersham Group; International leisure business consultancy
Chief Executive

1998 -2003;

Grant Leisure Group; International visitor attractions consultancy & attractions operator
Director

1992 –1998;

Vardon Attractions Ltd. (now Merlin Entertainments plc)
Development Director in charge of all aspects of new project location, build and opening

1987-1992;

Sea Life Centres Ltd.
General Manager of Sea Life Centre aquarium projects in UK, Holland

Previously;

Graduate in Marine Biology from Royal Holloway College, University of London

Current Experience:

- Galala Sokhna Resort, Egypt: Master planning the leisure & entertainment components of a new resort
- Phu Quoc, Vietnam: Feasibility study for a ‘Madame Tussauds-style’ waxworks attraction for leading leisure and real estate developer/operator, Vingroup. Master planning for the 100 Ha. ‘leisure quarter’.
- Northumbria Thrills, UK: business planning for a ‘Center Parcs-style’ resort in the north of England featuring a range of experience sports and high quality eco-accommodation

Recent Experience:

- Cardiff Bioquarium: feasibility study and planning for an international-standard aquarium to be built in Cardiff, Wales
- World of Discoveries, Portugal: feasibility study and concept development for a new attraction located in Porto (opened 2014)
- Melaka Alive! Malaysia: Operational Planning for a historical theme park project planned for the UNESCO World Heritage city centre of Melaka
- Uppakra Archaeological Science Centre, Sweden: Feasibility study, concept development workshops and business planning
- Marja-Vantaa, Finland: master planning of leisure provision as part of the development of a new town being planned for the outskirts of Helsinki

Other Relevant Experience:

- ‘Madeira Wine Experience’: Concept development and feasibility study for a wine-based brand centre to be located in Funchal, Madeira
- ‘Sea Life Centre, Porto’: Site location and negotiation, grant funding application support and general operational advice to Merlin Entertainments (Opened 2009)
- Madeira Story Centre, Madeira: Overall project management, business planning, operational management for this successful visitor attraction (opened 2005)

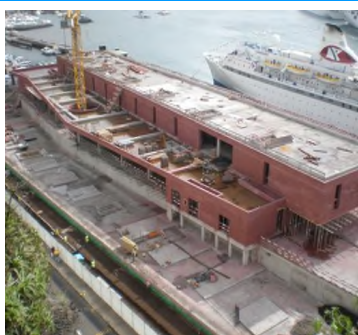
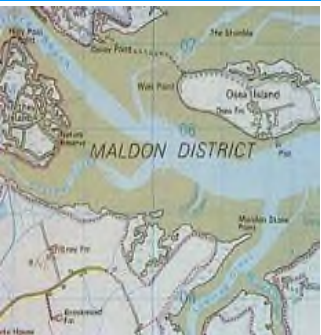
Staff Profile

Jonathan Rounce

FCA FIH

Areas of Expertise:

- Leisure trends
- Business & operational planning
- Integration of leisure into mixed-use schemes
- Financial structuring & funding



Thumbnail Career:

2001 - Date;

Petersham Group; International leisure business consultancy
Chairman

1994 – 2001;

Grant Leisure Group; International visitor attractions consultancy
MD & Finance Director

1992 – 1994;

Roux Brothers; Restaurant Group
Finance Director

1988 – 1992;

Arlington Securities Plc
MD with responsibility for marina, golf course, catering & other leisure development projects

1978 - 1988;

Coopers & Lybrand (now PWC)
Establishing & running their tourism & leisure consultancy practice

Previously;

Professional training as a hotelier and caterer and then as a Chartered Accountant

Current Experience:

- Blackpool 'Central Leisure Quarter' - developing a new leisure vision for this 7.15 hectare site to generate an additional 1m visitors a year to Britain's largest coastal resort
- Osea Island, UK - business planning to support the re-financing of this 134-hectare private events venue & holiday island 2-hours drive out of central London
- Kuwait Museums - Business planning for a major new complex embracing a Science Museum, Natural History Museum, Science Museum & Islamic Cultural Centre

Recent Experience:

- Las Vegas, USA: Preparation of a project validation report for a new London-themed thrill park to be developed on the Las Vegas 'Strip' and subsequently undertook a valuation of the business
- Mauritius - Reviewing & critiquing a series of leisure master plans that had been prepared for one of the island's major land holders, but which the land holder disputed
- Bournemouth, UK - Workshop facilitation to develop a 'Master Vision' for this coastal resort's town centre, using leisure development to boost the town's tourism credentials and wider economic prosperity

Other Relevant Experience:

- HM Tower of London - leisure development master planning for one of London's most iconic visitor attractions
- Houses of Parliament, UK - operational planning for the opening of parliament to the public on guided tours

Staff Profile

David Edwards

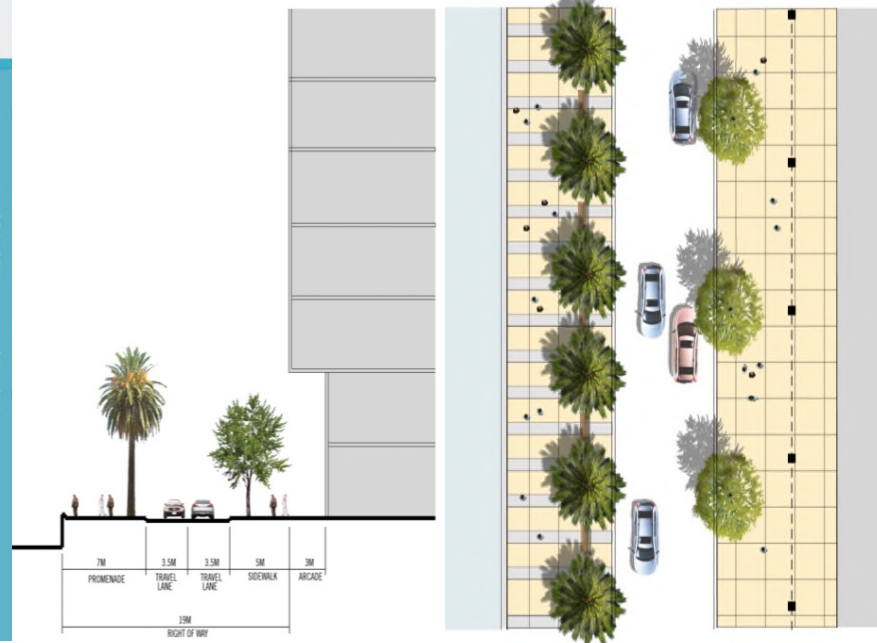
RIBA, ARB, MAA

Areas of Expertise:

- Master planning and strategy
- Urban planning and design
- Environmental design and sustainability
- Regeneration and public realm

Relevant Development Experience:

- International Media Zone Master Plan, UAE
- Master Plan for Central Jinan, China
- Greenwich Peninsula Master Plan, London, UK
- Qingdao Eco City Master Plan, China
- Science Town Master Plan, King Abdullah University of Science and Technology, KSA
- Stonythorpe Sustainable Village Master Plan, UK
- Thuwal Waterfront Master Plan, KAUST, KSA
- Strategic Vision for Glasgow Clyde Gateway, UK
- Strategic Vision for the Aire Valley Eco-Town, UK
- Strategic Vision for a Thames Gateway National Park, UK
- Strategic Vision for the Talbot Gateway, Blackpool, UK
- Shuanggang New Town Master Plan, China
- Strategic Vision for Nottingham Eastside, UK
- Strategic Vision for Wakefield, UK



Examples of our work

Vinpearl Resort & Waxworks Attraction, Phu Quoc, Vietnam

Vingroup JSC (Vingroup), the leading real estate and tourism business group in Vietnam plan the development of a parcel of over 3,000 Hectares of land located at the northern end of Phu Quoc Island, off the south coasts of Vietnam.

In November 2014 they completed the first phase of development at the site which will be known as the Vinpearl Phu Quoc Resort. This comprises a 5* Resort Hotel with 750 rooms, 150 Ocean View Villas, a luxury 'Vincharm' Spa; the Vinpearl Amusement Park, Water Park and Underwater World Aquarium, and the 27-hole Vinpearl Golf Club Phu Quoc. Business and meeting facilities also combine to make this development attractive to the MICE sector.

Planning has now commenced for Phase 2, which will establish Vinpearl Phu Quoc as a major resort. This will include seven main components: the largest golf course development in the world (a total of 14 new courses), a second 5-star resort and hotel, beach front villas, a large entertainment complex, convention centers, a safari park and a hot springs spa area.

With our input, Vingroup is now focusing on developing ideas for the entertainment complex which will include a 'World Showcase of Culture and Cuisine and a Waxworks Attraction of a size and standard similar to Madame Tussauds, together with other attractions appropriate to the location and the market.

Petersham Group completed a **feasibility study for the**

Waxworks Attraction and has made appropriate recommendations regarding its design, development and operation .



Galala Resort, Al-Sokhna, Egypt

Egyptian development company, Tatweer Misr will develop the Galala resort with the aim of it becoming the premier destination on the Sokhna coast. Utilising to the full the stunning mountain and coastal topography, they will create a new resort offering international standard hotel accommodation, luxury residences and an unparalleled range of sporting and leisure facilities, a mix that will be unique to Egypt.

From the vibrant bustle of the sea front and harbour, with its distinctive boardwalks reaching out into the Gulf of Suez to the solitude of the mountain-top luxury spa retreat, a series of distinctive neighbourhoods will be developed across the 2 million sqm site, each defined by their distinctive architecture, sympathetic to their particular location, and by the leisure and recreation offer located in each of these neighbourhoods.

Galala resort will be designed and built to international class and quality standards, an aspirational destination designed to appeal to the middle and upper income groups of Egypt and in due course, to international tourists. **Petersham Group's** role in the project is to **identify and locate in the master plan a unique range of viable market-leading leisure, sport and entertainment experiences** which will be success drivers for the resort, creating a distinctive identity and character for Galala. The first phase of 500,000 sqm, will be delivered within 3 years and will comprise the 'Old Town' of townhouses, villas, commercial centre and public amphitheatre, 4* hotel and the 'Corals', a boardwalk complex offering a wide range of water sports,

cafes and restaurants and a beach club.



London Thrill Park, Las Vegas, USA

Having secured a lease option on a 4+acre site on the Strip in Las Vegas the developers of a new London-themed thrill park commissioned Petersham Group in 2013 to **undertake a revision of their Business Plan and underlying financial model.**

This was achieved with a site visit and intensive assessment work, both in Las Vegas and the UK, enabling us to make a detailed appraisal of all aspects of the proposed development.

This also provided an opportunity to gain a detailed overview of the Las Vegas tourist market and the changing profile of the City's visitors and their behavioural patterns and expectations.

The project's concept and timing could not be better, as Las Vegas is seeing a continuing migration away from the gaming core that, for so long, has been the City's economic bedrock. With the gradually reducing age profile of the City's 40m annual visitors, their growing appetite for non casino-based entertainment and the site's central location the validation report produced by Petersham Group was able to endorse the project proposal and offer a range of guidance not only strengthening the projected revenue streams but also on enhancing the operational proposals to provide a better than anticipated return to prospective investors.

Subject to gaining the necessary permits, the project is scheduled to open in early 2017.



Cardiff BioQuarium

The Cardiff BioQuarium, a national-scale aquarium for Wales, is planned to be built in and over the historic Bute Dry Dock, located in Porth Teigr, Cardiff Bay. With a planned size of between 5-6,000m² floor area and an outline development budget of £20 million, it will be an attraction of international status, anticipated to draw up to 400,000 visitors per year.

The BioQuarium will be a new generation aquarium attraction, exhibiting a huge range of marine and fresh water fish and invertebrates, together with the mammals and birds that live in the environments which will be re-created, including the Antarctic (where the story of the Scott Expedition which left Cardiff in 1910 will be featured) and a Tropical Rain Forest with treetop canopy walkways.

Petersham Group, with their extensive experience of developing and managing wildlife attractions, particularly aquaria, were commissioned by project leaders, Tolliday Group International FZ-LLC of Dubai, to work alongside the project designers and architects, Kay Elliott Architects, to carry out a full feasibility study of the economics of the project based on a detailed study of the potential market for the attraction.

With the benefit of this feasibility study Petersham Group are now working with Tolliday Group to support fund raising for the project, which is planned to be completed in 2018.



Porto Sea Life Centre, Portugal

Merlin Entertainments, currently the world's second largest leisure company (behind only Disney), engaged Petersham Group initially to use their knowledge of the Portuguese leisure market and of Merlin's Sea Life Centre aquarium brand and to work with them to identify the right **location and site** for their first Sea Life project in Portugal.

Petersham CEO, Keith Thomas, was previously their Development Director, in charge of locating, supervising building and opening all new Sea Life Centre Aquarium and other attraction projects for the company and continues to keep a close working relationship with Merlin management..

Petersham, together with local associates, Eurofun Lda, identified the city of Porto as having the right combination of market size and conditions, a supportive political administration and importantly, eligibility for grant funding under the QREN programme (a combination of EU Structural funding and funding from the Portuguese government). The Petersham and Eurofun team helped Merlin to **secure a lease** which was mutually beneficial to the city and to Merlin, to **gain the necessary planning consents and building permits**, to obtain over 30% in **grant funding** and to see the project successfully built and launched to great acclaim, opening in June 2009.

Despite the difficult general economy in Portugal, the leisure and tourism sector remains relatively buoyant and the attraction continues to trade well and to meet Merlin's expectations.



Northumbria Thrills (UK)

Northumbria Thrills, to be located in Northumbria, UK, is designed by owner and developer, Active Leisure Resorts Ltd. to become Europe's leading lifestyle resort. It responds to a market demand for active and engaging out of home experiences and the promotion of a healthy lifestyle, while offering a range of leisure and entertainment that will involve the whole family group.

Northumbria Thrills will comprise a holiday resort village of 400 luxury Eco-lodges, camping pods, studio apartments and an unrivalled range of leisure and sporting activities, including an artificial ski slope and ski centre, indoor tropical swimming pool complex and spa, and a range of outdoor and experience sports and activities ranging from canyoning, mountain biking and equestrian sports through to zip wires, sailing and fishing on the 50-acre lake. In addition there will be a selection of shops including those selling specialist sports equipment and clothing, cafes and restaurants.

In contrast to many other holiday village developments the facilities will also be marketed at day visitors as well as staying guests. Significantly widening the appeal and increasing the size of the potential market. With this in mind, included within the master plans are a 'Go Ape' style high ropes adventure course and a 'Bewilderwood' style family woodland attraction.

Petersham Group have worked with the Active Leisure Resorts team to **advise on the development and funding of the project**, and will write the **business plan for the project**



Sheikh Abdullah Al Salem Cultural District, Kuwait

The Sheikh Abdullah Al Salem Cultural District is a 13 hectare site in the Al-Sha'ab area on the Western shore. It will house four world-class Museums, a Fine Arts Centre, a theatre and two Information Centres, with the facilities being linked by a central covered 'street' allowing visitors and residents to pass through the site from the city to the seashore of the Arabian Gulf. The buildings, with a total floor area of 40,000m², are simple, yet stunning, and use a contemporary reference to traditional architectural planning.

Petersham Group, working in collaboration with renowned museum and attraction design specialists, Haley Sharpe Designs, has provided a programme of **Operational and Institutional Planning Consultancy** to the project. This has provided the project team with the necessary information and expertise to plan for the future management of this major museum project, and to make key informed decisions regarding operational matters during the development phase until the Client's museum management team is in place.

Our tasks have included reviewing the potential market and demand for the project and developing a strategy for its operation within the context of the current architectural and exhibit design.

We will continue to work with the project team to ensure that the Centre is delivered ready for 'operational excellence'.

With a view to the appointment of a management company

for the Museums, we have prepared detailed RFP's on the Client's behalf for the selection and appointment of a suitably experienced company to manage and operate the site. Our work will be used to evaluate tender bids and establish performance measures for the successful tendering company.



Blackpool's 'Central Leisure Quarter' (UK)

Petersham Group have been retained by Montagu Evans to work with them for Blackpool Council and a number of other key agencies to re-visit the planned 'Central Leisure Quarter', a site of 7.15 hectares fronting onto Blackpool's Promenade. The town already attracts some 10m adult visitors a year (15m in total) and wants to establish a new attraction cluster on the CLQ site to add an additional 1m visitors a year and encourage longer stays and greater spending in the town.

Following a series of face to face and telephone interviews with key stakeholders the focus is now turning to the identification of leisure development concepts that would suit the CLQ, whilst complementing the already extensive range and number of existing attractions in Blackpool.

Extensive reference is also being made to new and emerging leisure development schemes elsewhere in the UK and internationally and will shortly move on to discussions with potential developers and attraction operators.

In seeking to establish the CLQ as a major new driver for the town consideration is being given to the full spectrum of facilities that will need to be developed to support the anchor attraction(s), including retail and food and beverage offers, parking and leisure & entertainment facilities.



World of Discoveries, Porto, Portugal

Leading Portuguese tour operator, Douroazul Lda. bought around **4,000m²** of old port wine warehouses in the centre of historic Porto. One part has been adapted to become their central headquarters and Tourist Information Centre, whilst in the other half, a brand new visitor attraction has been built, opening in **May 2014**, telling the story of the Portuguese discoveries of Africa, Brazil, South East Asia and eventually the first circumnavigation of the globe.

Douroazul commissioned a team comprising **Petersham Group and Haley Sharpe Design** to plan the attraction, carry out a **feasibility study** and **design the concept** for the project. Working closely with Douroazul President, Mario Ferreira, a wholly unique idea was developed.

The World of Discoveries attraction commences with a walk through area, themed as a series of representations of 15th Century Lisbon, where guests assemble their kit for the voyage ahead, investigate routes on reproductions of the maps of the time and take on a role play identity.

The attraction then utilises the pillared structure of the wine cellars, and includes a 10 minute long dark water ride taking guests in specially designed 'galleons' through a series of innovative scenes, each based on a geographical location key to the story of the Discoveries. A range of audio, lighting, projections, wax models, 'peppers ghosts' and other effects are used to tell the stories. Disembarking, guests exit via a large shop stocked full of specially commissioned merchandise, also accessible to passing trade, before returning to the Porto river front. There is a restaurant featuring cuisines from all of the different areas

of the world discovered by the Portuguese. This project demonstrates how Petersham Group works closely with design teams and clients to develop new and viable attraction concepts.



World of Discoveries, Porto, Portugal



El Secreto de Los Mayas, PortAventura, Spain

In early 2013, the development team at PortAventura sought the design, fabrication and installation of a compelling new attraction into a 220m² building in the 'Mexico' area of the park – and to have it open in time for Easter!

Our team had the experience and the product to match this aspiration, and we worked with world-class maze designer, Adrian Fisher who came up with the concept of "El Secreto de los Mayas", a self-contained, walk-through themed attraction with a mirror maze at the heart.

All Adrian Fisher designs have a strong storyline and this was no exception, the visitors seeking the 'Lost Secret of the Mayas' in an archaeological dig before becoming lost in a seemingly endless labyrinth.

Keith Thomas of Petersham Group took **planning & Project Management** responsibilities and after development of a design brief, UK-based exhibition company, GTMS were engaged to build and install the attraction, with NetherLED of Maastricht, Netherlands brought in to design and install the technical system needed to complete the project.

GTMS pre-fabricated the new attraction, including over 90 triangular mirror maze cells which fit together like a carefully-designed jigsaw puzzle to lose and confuse the visitor, creating delight and playing with their senses as the beautifully-designed Mayan-style graphics change colour as RGB LEDs morph colour in sequence.

The whole mirror maze attraction was built in under 6 weeks from approved design, tested, packed and shipped to arrive in PortAventura on 15th March. An intensive on-site programme of

works saw the maze installed, commissioned and signed off by the client on the 25th March, just 10 days later.



Aquatopia, Antwerp, Belgium

Petersham Group has significant experience in the development and operation of aquarium projects world wide, and are regularly engaged by clients interested in developing such projects and in exploiting them profitably. Aquatopia is a ground breaking public aquarium attraction located in 3,200 m² of floor space over 3 floors of the Park Plaza Hotel in central Antwerp.

Keith Thomas project managed the design and development of the original project in 2001-2 and in 2005-6 we were asked to provide further operational management assistance by Park Plaza.

Our responsibilities were wide ranging and included the review of all commercial, marketing and operational aspects of the project. We used this review as the basis for guiding the management in setting out strategies for managing the further development and operation of the project whilst taking into account the legislative and zoological implications.

Other responsibilities included developing the marketing strategy, advising on the retail merchandise range, human resource planning, a food and beverage strategy and advising on the reduction of the cost base.

With a total project development budget of €12 million including periodic re-investment, visitor numbers in excess of 250,000 per annum have been achieved since opening in 2003.



BugWorld Experience, Liverpool

In early 2008, Petersham Group met Des Rogers, owner and CEO of Dublin-based Rogers Group Investments Ltd (RGI), to discuss his plans to develop the UK's first stand alone, interactive family attraction based on the world of insects and bugs.

RGI's vision was to develop a project that would allow the concept to be proven at a location in the Albert Dock, Liverpool. Petersham Group worked with the project throughout the whole design and development process, working with RGI to ensure that the attraction under development was operationally fit for purpose and that it delivered a high-quality, inspirational visitor experience that would open the eyes of the visitor to the fascinating world of bugs, without which all other life on earth would not be able to survive.

We were tasked with putting in place all the necessary operating procedures and equipment required to operate BugWorld, recruiting and training the team that would manage the attraction and also managing the agencies responsible for the pre and post-opening marketing campaign.

Immediately prior to the opening Petersham Group ensured that management control, ticketing and EPOS systems were put in place, worked with the specialist curatorial team to ensure that the permits and licences necessary to open were duly secured and that the attraction was properly commissioned prior to handover by the installation team to the management team. We

subsequently provided executive management to the attraction in the first months following opening before assisting with the recruitment of a General Manager to run the business on behalf of RGI.



Lisbon 'Barreiro Strategic Vision and Master Plan'

The Municipality of Barreiro, part of the greater Lisbon region in Portugal is located south of the River Tagus estuary and was in the past a significant transportation hub, particularly being the main northern terminus for trains running to Lisbon from the south. Now, although benefitting from excellent fast-ferry links to historic downtown Lisbon, those rail services run direct over new bridges into Lisbon and a large part of the waterfront and town centre lie underused.

A project development group, comprising the Regional Tourist Board, the Municipality of Barreiro and Portuguese Railways engaged Petersham Group to undertake an exercise, initially to develop a Strategic Vision for Barreiro centered around the Experience Economy by means of stakeholder workshops.

The intention is that this will be followed up by an appraisal of the different options available and a benchmarking exercise, considering comparable developments elsewhere in Europe, before the creation of a master plan for the development of the vision which will locate the different components in the optimum position, taking into account the commercial and funding realities.

Petersham Group has proposed a route map and milestones and will go on to guide the process in association with the project group.



Madeira Story Centre, Funchal, Madeira

Following an initial **Scoping Study**, Petersham Group was contracted by Madeira-based Blandy Group SGPS as **project directors and coordinators for the development and subsequent operation** of their 'Madeira Story Centre' project.

Located in central Funchal, the attraction tells the story of the **history and culture** of this beautiful island in an interactive, entertaining and informative way. It uses a wide range of media, from physical and IT-based interactives through to costumed guides, 'smell boxes', models and real artefacts.

A private investment with a capital budget of €7million, supported by €3million of grant funding, the project occupies a pair of listed buildings, formerly warehouses, in the old town area of Funchal. The Story Centre opened in May 2005 and has established itself as **one of the leading tourist destinations of Madeira**.

Initially contracted to assess the project's prospects through the preparation of a **feasibility study and business plan**, we were retained to '**see the project through development to launch**'.

Our responsibilities included **selecting, briefing and managing** the specialist exhibition and retail designers Haley Sharpe Design and ensuring that the designs that were developed matched both client and market requirements. Subsequently we undertook the recruitment and training of the operational management team, development of the opening marketing strategy,

implementation of operating and management control systems (including ticketing and EPOS for the shop and café) and assembling a retail merchandise range.

Petersham Group managed the opening of the attraction and subsequently delivered a programme of long-term management support to the local team.



Madeira Story Centre, Funchal, Madeira



Melaka Alive! Malaysia

Following a **scoping study** carried out in 2012, Petersham Group were retained as **development and operational consultants** to advise the Malaysian company, Pekan Legasi Sdn Bhd on the development of a new 'Heritage Park', called Melaka Alive! , located in the southern Malaysian city of Melaka, 2-hours drive to the south of Kuala Lumpur and a 3-4 hour drive up from Singapore.

Melaka Alive! is planned to be located in the centre of the historic old town, recently designated a UNESCO World Heritage site. The project comprises the upgrading and re-positioning of 5 of the museums previously owned and operated by the city, together with the creation of a brand new attraction to be staged on the deck of a specially constructed land-based Malay ship.

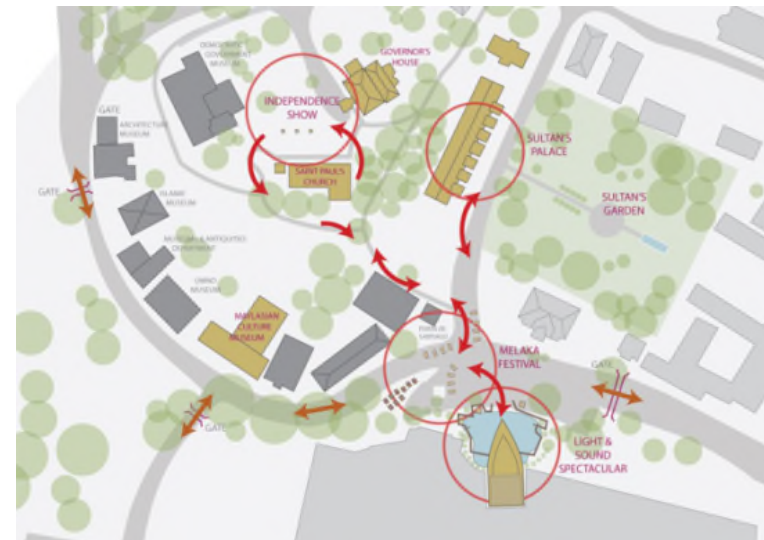
A 35-minute multi-media show, telling the story of the country of Malaysia from founding through to independence involves high-resolution specialist projection onto water screens forming the sails of the 'ship'. A range of audio-visual, pyrotechnic and special effects, together with live actors, all add to the show's excitement and appeal. Together these will form a compelling and attractive destination for tourists and for the residents of Malaysia.

The show represents the first phase in the multi phase development of a major heritage park in which the various maritime and other museums will be linked together by heritage trails, programmes of events and common marketing.

Through a series of creative *charettes*, we have worked with architects, designers and the client team to create a new master plan and development programme designed to ensure that in addition to the core museums and the show, there are sufficient other visitor services and facilities, including restaurants and cafés, ticketing, shops and kiosks, toilets and car parking.

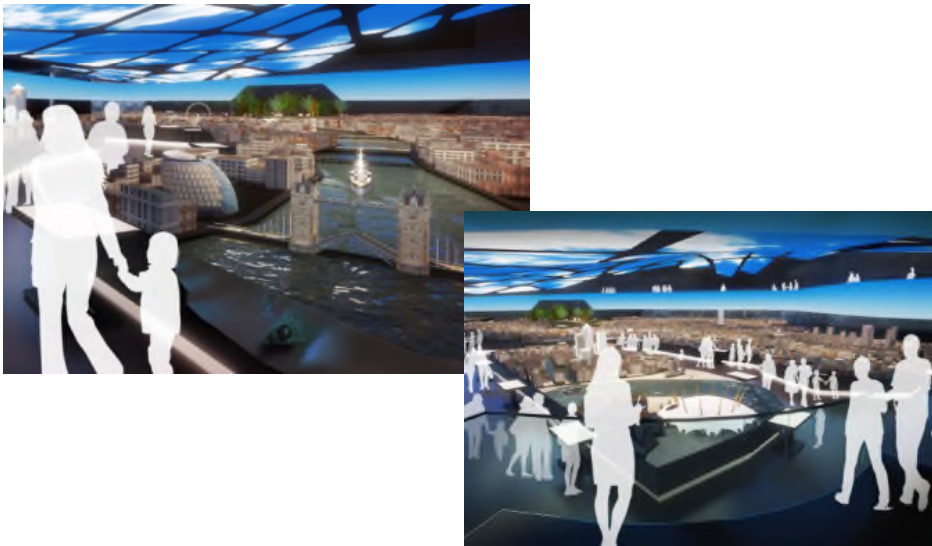
We also developed an operating strategy for phase 1 of the project.

This project is a good example of our experience of working within a sensitive and heavily 'listed' or similarly protected site.



Little London – the greatest model city on earth

In the autumn of 2011 Petersham Group were retained as commercial & development consultants by a team embarking on the creation of a major new visitor attraction in the heart of London. The heart of the attraction is a 2,600m² living model (scale 1:175) of central or 'visitors London – an area of some 25km² - with a series of separate zones focusing on 'Royal London', 'Sporting London', Maritime London etc. Hence the name, 'Little London - the greatest model city on earth'.



Having started by **identifying and evaluating potential sites** that could accommodate the project Petersham Group's focus moved on to the preparation of a comprehensive and site specific **business plan** and underlying **financial model** to support the project's on-

going design development and fund-raising, starting with a thorough **evaluation of the wider London visitor attractions market**.

The business plan, in addition to projecting hourly, daily, weekly, monthly and annual visitor throughputs and associated design day planning parameters, identified and quantified all direct and indirect revenue sources, capital costs and revenues operating costs.

In addition we advised on manpower structures and the contracting out of certain services, including catering, cleaning and facilities management.

The preferred site has now been secured and fund-raising is at an advanced stage.

Located adjacent to Tower Bridge and facing HM Tower of London (two of London's most iconic and visited attractions) and nestling on the southern embankment of the River Thames, Little London will be the first significant addition to the London tourist attraction scene since the launch of the Millennium Wheel/London Eye in March 2000.

Splashlands, Welwyn Garden City, UK

Set in 126 acres of picturesque Hertfordshire parkland, the Stanborough Activity Centre is rapidly being developed to become an outstanding regional facility offering a wide range of outdoor activities. In addition to sailing, windsurfing, kayaking, angling, disability cycling and many other activities currently provided, 2013 will see the opening of a new high ropes course. Subsequently, they plan for this to be followed by 'Splashlands' an exciting children's play park incorporating water features, a cafeteria and an education zone.

Design and build contractor, Saturn Projects were appointed to develop 3 alternative design concepts for Splashlands and **Petersham Group** joined with them to carry out a **market analysis exercise to assess the potential market** for Splashlands, taking into account factors that might affect attendance (including analysis of competitors), going on to create a series of 'what if' scenarios for each alternative, each showing the provisional impact of greater or lesser investment on the project and on sustainable ticket price.

We also advised on the likely **requirement for retail and catering** services and for other user facilities at the site.



Hannah's Mirror Maze, Pigeon Forge, USA

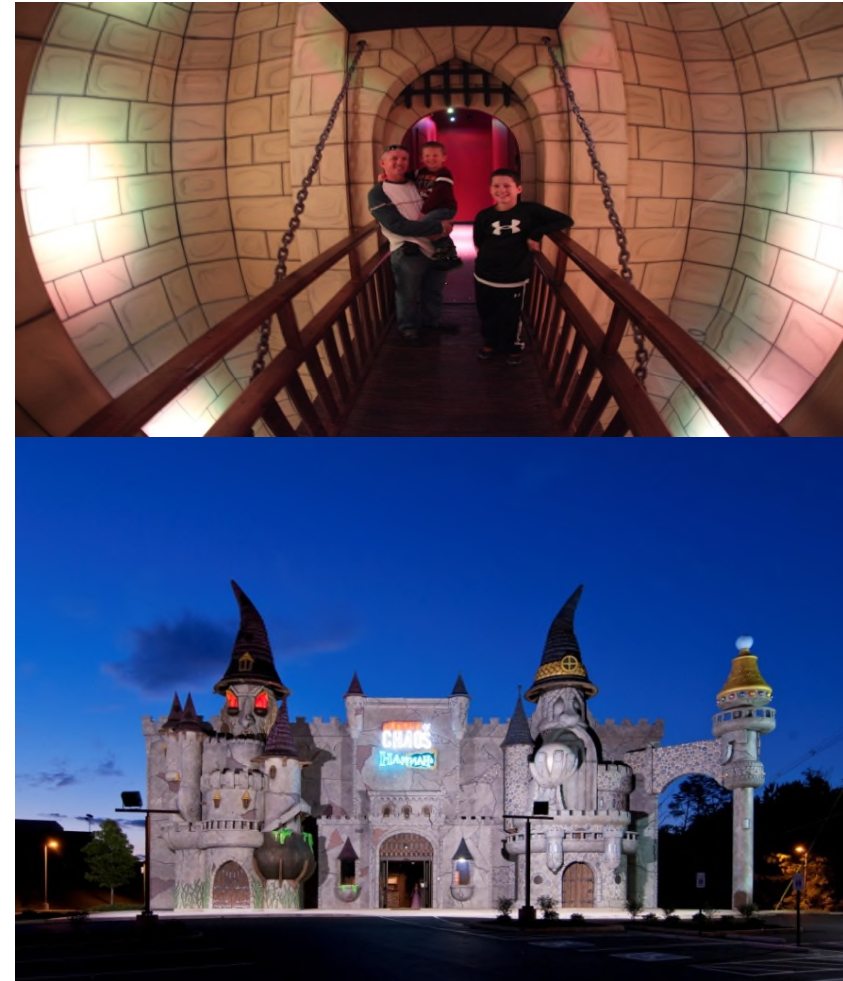
In 2012, Petersham Group completed a project in collaboration with the world's leading designer of mazes and maze-based attractions, Adrian Fisher Design Ltd, to plan and then project manage the installation of a ground breaking new attraction based on mirror mazes and other illusions, Hannah's Mirror Maze.

The attraction, is owned and operated by Kuvera Partners, owners of the **Hollywood Wax Museum** brand (a Hollywood Wax Museum has been developed alongside the mirror maze), and is located in Pigeon Forge, Tennessee, USA.

Covering 500 m², the Mirror Maze is a high capacity, custom-designed immersive 'Adventure' which tells the story of the Princess Hannah, kidnapped by a witch for being vain and hidden in a maze of mirrors for 7-years. Visitors are challenged to find their way through the maze and to set Hannah free in exchange for 'all the riches of the Kingdom'. It includes setting the story in the context of a series of magically deceptive chambers, vertiginous drops and out-of-this-world illusions. Guests are immersed in a compelling adventure, where every part of their imagination is stimulated and challenged

The mirror maze and the other components of the attraction were pre-fabricated in the UK and then shipped to the USA where they were erected on site in just over 2 weeks.

The attraction has been a great success and we subsequently developed another similar project, with the same mix of Wax Museum, Hannah's Mirror Maze Adventure and other attractions in **Myrtle Beach, South Carolina**, which opened in June 2014.



Uppåkra Arkeologiska Center, Southern Sweden

The planned Uppåkra Arkeologiska Center (UAC), located between Lund and Staffanstorp in southern Sweden, will be designed to interpret one of the most important Iron Age sites in Northern Europe, as well as creating a state of the art showcase for Archaeological Science. It is expected to become one of the leading destination visitor attractions in Sweden when it opens in 2017.

Petersham Group were initially contracted by the University of Lund, a key stakeholder in the project, to assist them to **formulate their vision** for the project.

As a result of the success of that process, we were then asked by the project manager of the Stiftelsen UAC to **run a series of workshops** bringing together all of the stakeholders in the project. The aim of those workshops was to develop a **mission statement**, agree the **aims and objectives** of the project and to develop the basis of a **design brief** that took into full account the needs of all users and visitors to the site. These included the visiting public, schools and university students, archaeologists excavating the site, curatorial staff conserving the finds and of course, the operational management and staff required to run the project.

With a number of possible development options available to the project team, we were then retained to carry out an objective **Options Appraisal** in order to guide the UAC team in making future choices regarding the design and execution of the project.

The feedback received, from both the University and

subsequently from the UAC team, demonstrated the value of the workshop approach to both harmonising attitudes amongst multiple stakeholders and to narrowing down the development options.



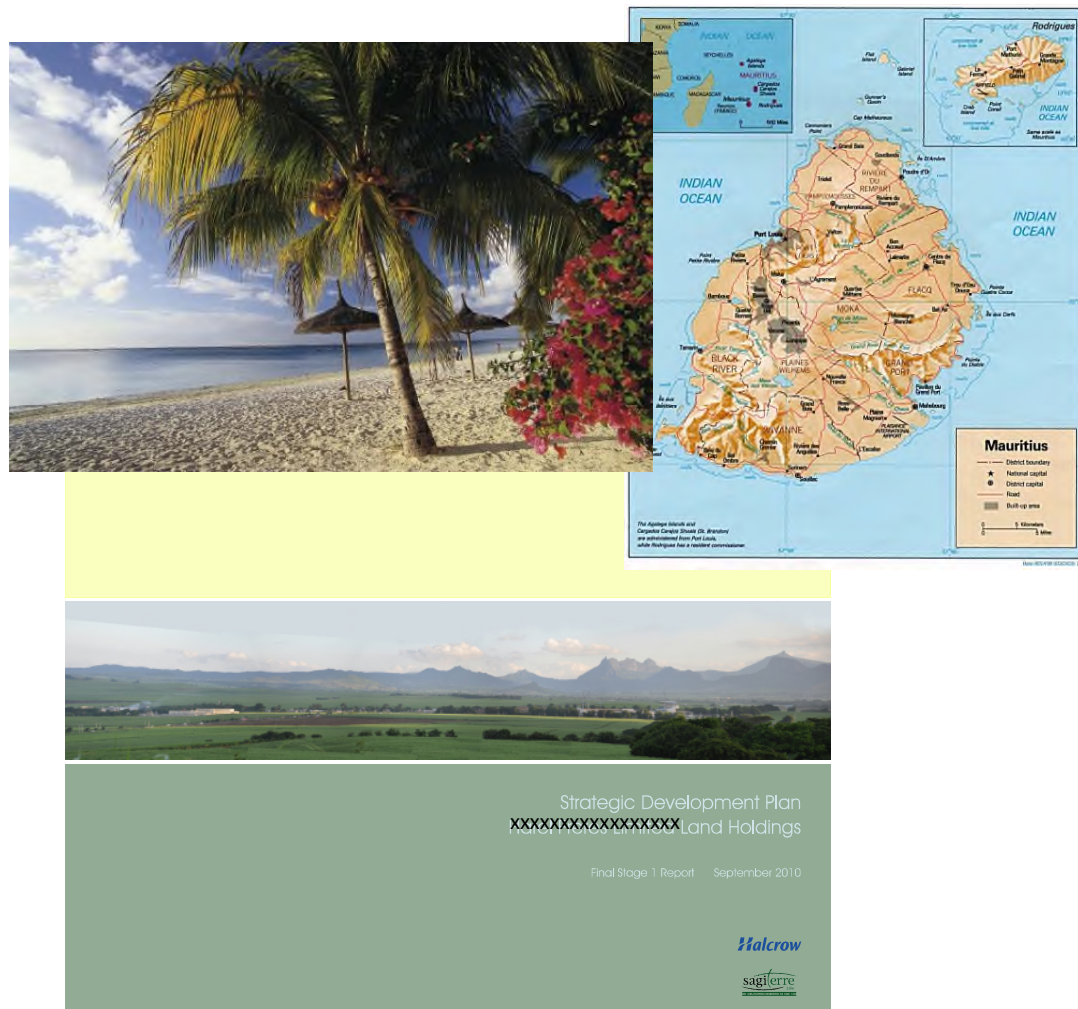
Master planning, Mauritius

In 2011 we were invited to participate in a ‘Challenge Panel’ of three experts brought together to challenge, or critique, a master plan that had been drawn up for a major industrial conglomerate on the Indian Ocean island of Mauritius. The master plan addressed the future development of the company’s extensive land holding of some 6,667 hectares.

The land owners were not convinced by the master plan and wanted it to be independently tested and challenged. The Challenge Panel tasked with this role was drawn from South Africa, the Middle East and UK, and comprised a residential expert, a commercial expert and a leisure expert, with Petersham Group covering leisure.

The leisure components within the master plan were very wide ranging and included hotels of various sizes, standards and type, restaurants, night clubs, bars, specialty retail, a very wide range of sports facilities and many other elements to serve both the resident and tourist markets.

We were invited to join this panel because of our **expertise in the integration of leisure components within large scale mixed-use developments**, our international focus on the leisure market and our extensive understanding of leisure trends.



Houses of Parliament, London

As possibly the most iconic building in Britain, the call from Black Rod and the Serjeant at Arms to determine how the Houses of Parliament could be opened up to the general public was a challenge that was too good to resist!



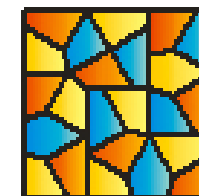
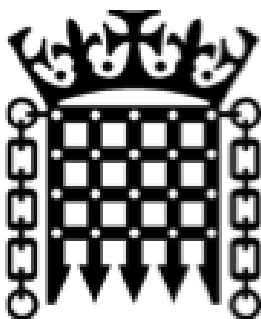
Not only was it necessary to establish how the public could be appropriately guided through the Palace of Westminster, as the Parliament buildings are more correctly known, but how such a system could be accommodated by the two Houses. How were we to balance the influx of thousands of tourists within a very busy and security focused complex, whilst also ensuring that the wishes of all Members were respected and the rights of access and movement of all Members and Officers were preserved?

Even more difficult was just how to 'sell' the proposed plans to the relevant administrative committees of the two

Houses, whose approval was a pre-requisite. Nevertheless it was achieved, slowly but surely, and after two successful years of piloting a tours programme, it is now an established part of the Parliamentary programme with over 1 million visitors a year. We also advised on the establishment of a Central Ticket Office to control the issue of tickets and on the allocation of guides for all tours within the Palace of Westminster.



Some of our other clients



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Keith Thomas, Petersham Group 2012



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