



February 2018



Petersham Group

Petersham Group is a specialist leisure consultancy working across the Experience Economy. Established in 2001, 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

"A goal without a plan is just a wish." Antoine de Saint-Exupery



Keith Thomas & Jonathan Rounce leading 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:

- **Strategic development & Master Planning advice**
- **Feasibility Studies**
- **Business planning & financial modeling**
- **Project management/attraction development**
- **Operational consultancy & Executive Management**
- **Options appraisals**
- **Funding advice & assistance**

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.

Plan ahead - Our experience shows that it is essential to plan and define what is needed first – defining the basis of the master plan, the type of development or attraction sought, and setting out 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 to establish viability, leading to a robust & credible business plan that will support the funding of 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:



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.
- Leisure Trends



Thumbnail Career:

2003 - Date;

Petersham Group;

International leisure business consultancy

Chief Executive

1998 -2003;

Grant Leisure Group; International visitor attractions consultancy & attractions operator

Projects Director

1992 –1998;

Vardon Attractions Ltd. (now Merlin Entertainments plc)

Development Director in charge of all aspects of new project location, development & opening of Sea Life Centres, Dungeons & other attractions

1985-1992;

Sea Life Centres Ltd.

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

Previously;

1983 Graduate in Marine Biology from Royal Holloway College, University of London, followed by Marketing Manager Reed Executive plc

Current Projects:

- Royal Irish Regiment Museum. Currently undertaking a full Market and Feasibility Study for the Royal Irish Regiment of the British Army, to be located in Belfast. It will showcase & commemorate the service of the Irish soldier in the British Army (ongoing)
- Bognor Regis, UK: Expert Leisure input to a multi-disciplinary team commissioned by Arun District Council to establish the redevelopment potential of 2 key town centre sites & develop a concept masterplan. A pre-cursor to seeking appropriate development partners. (ongoing)
- Malmö South, Sweden: Collaboration with Kay Elliott Architects, working with the City of Malmö, creating a development strategy, concept masterplan & investor teaser for a new destination, anchored by leisure attractions, located south of the city (ongoing).

Recent Experience:

- Il Galala Sokhna Resort, Egypt: Masterplanning the leisure & entertainment components of a new resort on the Sinai coast with BCI Studios (2015-current)
- World of Discoveries, Portugal: feasibility study and concept development for a new attraction located in Porto (opened in 2014)
- Melaka Alive! Malaysia: Masterplanning & Operational Planning for a historical theme park project in the UNESCO World Heritage city centre of Melaka (opened 2015)
- Phu Quoc, Vietnam: Feasibility study for a 'Madame Tussauds-style' waxworks attraction for leading leisure & real estate developer/ operator, Vingroup. (2015)

Other Experience:

- 'Sea Life Centre, Porto': Site evaluation, grant funding support & general operational advice to Merlin Entertainments (Opened 2009)
- Madeira Story Centre, Madeira: Project management & business planning, management supervision of new visitor attraction (Opened 2005)

Profile

Jonathan N Rounce

FCA FIH



Areas of Expertise:

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



Thumbnail Career:

2001 – Date

Petersham Group,
International leisure business consultancy
Executive Chairman

1994 - 2001

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

1992 - 1994

Roux Brothers
Food importing business
Finance Director

1988 - 1992

Arlington Securities Plc,
Property development
MD of leisure arm,
Marina, golf course, catering & other leisure development projects

1978 - 1988

Coopers & Lybrand (now PWC)
Established & ran the London-based tourism & leisure consultancy practice

Previously

Professional training as an hotelier and caterer & then as a Chartered Accountant, followed by 3-years with Hallway Hotels Overseas Ltd

Current Projects:

- London Fire Brigade Museum – business planning for the new LFB Museum to be sited within the former LFB HQ building on the Albert Embankment as part of a major PPI regeneration scheme being undertaken by U+I Group Plc for the London Fire and Emergency Planning Authority (on-going)
- Kelmscott Manor – business planning for the planned enhancement of the former country home of William Morris, of the English Arts and Crafts Movement, as part of a major Round 2 grant application to the HLF (on-going)
- Bognor Regis – Expert Leisure input to a multi-disciplinary team commissioned by Arun District Council to establish the redevelopment potential of two key town centre sites & develop a concept masterplan as a pre-cursor to seeking appropriate development partners (on-going).

Recent Experience:

- Silverstone (UK) - business planning for a major new £20m visitor experience, including accessible archive and heritage tours across the wider Silverstone site in Northamptonshire. The plan secured a £9.1m HLF grant and substantial funding from 5 local authorities and two LEPs (Ongoing)
- Blackpool ‘Central Leisure Quarter’ – development of a new leisure vision for this 7.15 hectare site to generate an additional 1m visitors a year to Britain’s largest coastal resort and to attract new investors and operators. (Ongoing)
- Las Vegas, USA - Preparation of a project validation report for a new London-themed thrill park to be developed on the Las Vegas ‘Strip’. Subsequently undertook a valuation of the business (2015)

Other Experience:

- Service as a non-executive director of Albion Venture Capital Trust, stepping down in 2014
- Currently serving as a trustee of both the Florence Nightingale Museum and Children & The Arts, and Chair of the latter’s Finance and Audit Committee

Profile

David Edwards

RIBA, ARB, MAA



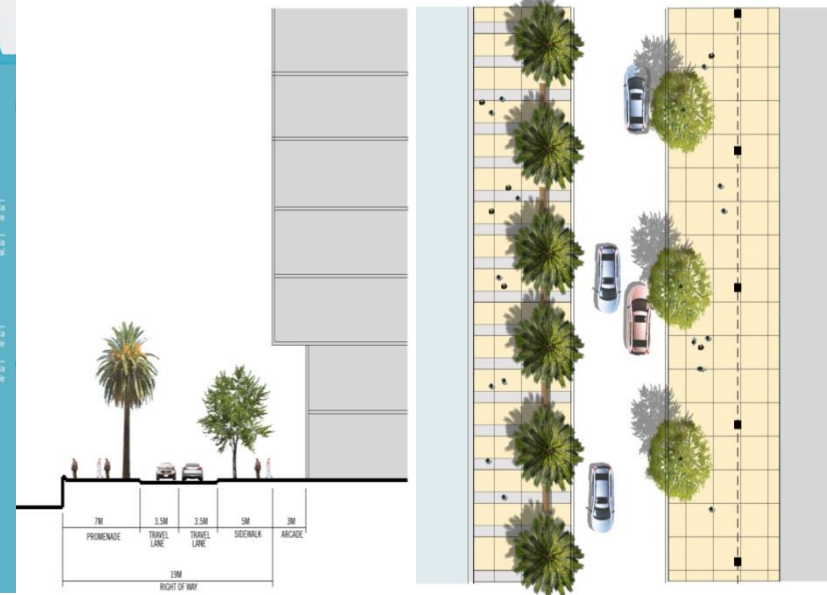
Areas of Expertise:

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

A Chartered Member of the Royal Institute of British Architects (RIBA) and the Danish Architecture Association (MAA), David is registered with the Architects Registration Board and is a member of the UK's Urban Design Group

Relevant Experience:

- Greenwich Peninsula Master Plan, London, UK
- International Media Zone Master Plan, UAE
- Master Plan for Central Jinan, China
- Qingdao Eco City Master Plan, China
- Science Town Master Plan, King Abdullah University of Science and Technology, KSA
- Stoneythorpe 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



Profile

Annie Lucas

BA (Hons), MA

Areas of Expertise:

- Research
- Project management
- Marketing & Audience Development
- Interpretation of historic venues
- Theatre / Performance venues
- IT (MS Office, Adobe Creative Suite)



Thumbnail Career:

2015- Date

Petersham Group, International leisure business consultancy

Consultant

2014- Date

St Agnes Chamber of Commerce

Project Manager (Part time)

2013

Tunbridge Wells Museum & Art Gallery

Marketing and Audience Development
Consultant

2008-2013

Rochester Cathedral

Interpretation Manager

2007-2008

English National Ballet School

PA to the Director

Previously

2002 – 2008

Multiple performance venues

Following graduation in BA Hons Design for performance (St. Martin's School of Art) & MA in Costume Design, was Costume Designer for touring companies including Royal Opera House, National Ballet of Ireland, English National Ballet School, The Scoop, and Sadlers Wells main stage

Current Experience:

- St Agnes Chamber of Commerce - Innovating events and projects which will actively engage the community with St Agnes thereby driving the economy there and promoting local business. Planning, Programming and Delivery of Annual 'Outsider' festival. A 3 day festival of the Outdoors with arts, heritage, sport and culinary aspects.
- Kelmscott Manor – business planning for the planned enhancement of the former country home of William Morris, of the English Arts and Crafts Movement, as part of a major Round 2 grant application to the HLF (on-going)

Other Experience:

- Tunbridge Wells Museum & Art Gallery: Appointed to report on current position and recommend for future audience development work to target audiences in line with Borough Council's objectives, and to inform the writing of a new audience development plan (last revised 2006)
- Rochester Cathedral: Hidden Treasures; Fresh Expressions Interpretation Manager - developing creative content for exhibition, audience development and outreach elements of Round 2 Heritage Lottery Fund bid (£3.5 million) for project entitled Hidden Treasures Fresh Expressions designed to reveal hidden treasure of Cathedral collection and widen participation and access to the country's second oldest Cathedral. The grant was successfully won in Feb 2013
- Rochester Cathedral: Creative Director of HLF funded project (£1million) - Ancient Stones; Untold Stories. Key responsibilities included: Managing organisation wide re-branding of Cathedral in association with ASUS project. Marketing & PR (authoring a 3 year marketing and audience development strategy, creative copywriting, press releases, advertising, media contact) maintaining and updating relevant pages of website, volunteer management (350 in total, 80 direct reports) and evaluation.

Examples of our work

Il Gala Resort, Al-Sokhna (Egypt)

Egyptian development company, Tatweer Misr is developing the Il Galala resort with the aim of it becoming the premier destination on the Sokhna coast, facing the Gulf of Suez. Utilising to the full the stunning mountain and coastal topography, a new resort is being created over a 10 year period offering international standard hotel accommodation, over 2,000 luxury residences and an unparalleled range of sporting, entertainment and leisure facilities, a mix that will be unique to Egypt.

From the vibrant bustle of the sea front and new 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 also 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 rapidly growing middle and upper income groups of Egypt and in due course, to international tourists.

The first phase of 500,000 m², 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.

A project of this scale and ambition has required a multi-disciplinary team to work with the client team to create

and realise a unique vision. Tatweer Misr have brought together sector-leading expertise from throughout Europe, the Middle East and from Egypt. Working closely with Italian master planning architects, 5+1AA and retail architects, BCI Design Ltd. from the UK, 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 Il Galala.



Regis Centre, Bognor Regis (UK)

A dramatic new regeneration project is planned in the historic English seaside town of Bognor Regis. Having identified two town-centre sites in need of redevelopment Arun District Council commissioned a review of the sites and feasibility studies for their comprehensive redevelopment.

The aim is to use these sites as a major catalyst to showcase Bognor Regis as a forward thinking coastal town that optimises the natural beauty of the sea and the South Downs (a National Park). Petersham Group are working in a team including Urban Delivery, Arup and Kay Elliott Architects to inject compelling but sustainable leisure concepts and uses into the evolving plans for the two, very different, sites.

The outcome is creation on the Regis Centre of a new concept, a year-round destination **'Gardens by the Sea'** anchored by a 3,000m² Winter Gardens Biome and a new Theatre and cultural centre. Together with a hotel, retail and restaurants giving views of the sea & a roof garden/performance space above the new theatre. This scheme and the 'Linear Park' concept at nearby Hothamton includes high quality residential accommodation & exterior landscaping.

This is a typical role for us, working alongside master-planners, architects, placemakers and designers to propose sustainable leisure uses that can be integrated into mixed-use schemes, helping to build footfall, grow dwell times and stimulate increased economic activity.



Silverstone Heritage Experience, Silverstone (UK)

In 2013 the British Racing Drivers' Club was successful in its Round I funding application to the HLF to help develop a 6,181m2 motor racing heritage attraction, Silverstone Heritage Experience at the famous F1 circuit. Project value is estimated at £18.2 million. Petersham Group were brought in at short notice by Silverstone Circuits Limited to prepare a *Key Assumptions & Indicative Financial Outcomes* document as part of a Round II Heritage Lottery Fund (HLF) bid.



This was followed up by more detailed business planning inputs and the preparation of a comprehensive financial model to support the full Stage II bid, which resulted in a £9.1 million award from the UK's Heritage Lottery Fund. The project vision is to bring the extensive heritage of Silverstone and British motor racing to life through the creation of an exciting visitor experience, accessible archive

housing the BRDC collection and a series of heritage tours stopping off at iconic sites around the circuit.

The Silverstone Heritage Experience will house a series of interactive exhibitions and displays within the only remaining World War II hangar on the site.



The hangar will be extensively refurbished, re-clad and extended to create a fantastic, authentic backdrop where visitors will follow a route through the exhibition that traces the outline of the circuit. It will not just be a museum about cars, but an exciting visitor journey that uses the latest technology to tell compelling stories of the people that have been part of the site's history and those who have played an important role in the history of British motor racing. The new facility will also feature a welcome area, shop, café, education rooms and circuit viewing gallery. In addition to the main indoor Experience there will be bus-based guided and non-guided walking tour options so that visitors can also see key parts of the Silverstone racetrack and associated facilities.

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 has been used to evaluate tender bids and establish performance measures for the successful tendering company.

Malmö South (Sweden)

The South-western province of Sweden, Skåne attracts over 3 million tourists annually and has around 1.3 million residents. Both the tourist and resident market are growing year on year. Together with the Danish Island of Zealand, Skåne forms part of the Oresund economic region, with around 4 million residents, principal cities are Malmö (Sweden) and Copenhagen (Denmark).

The Regional Authority, Region Skåne has identified that there is a strong and affluent potential market for tourism and leisure in the region but that there are too few international quality visitor attractions in Skåne, particularly those which would attract families with children. This is in contrast to neighbouring parts of Denmark, particularly Copenhagen. They have concluded that this is affecting its ability to compete in the visitor economy.

Region Skåne commissioned Petersham Group, together with UK architects / master planners Kay Elliott Architects, to analyse the Skåne region in order to identify the best location to develop a leisure destination of regional appeal. The preferred site identified was one located to the south of the city of Malmö, owned by the city and measuring 115,000m². Having selected this site as the best option, we were tasked to assess likely market demand for visitor attractions in Skåne generally and Malmö specifically before going on to develop and evaluate different options for developing the site as a year-round leisure destination appealing to residents and to visitors alike.

The main output of this exercise has been to create a development brief, summarised in a brochure created for potential developers and operators of attractions at the site.



Porto Sea Life Centre, Porto (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.



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 .



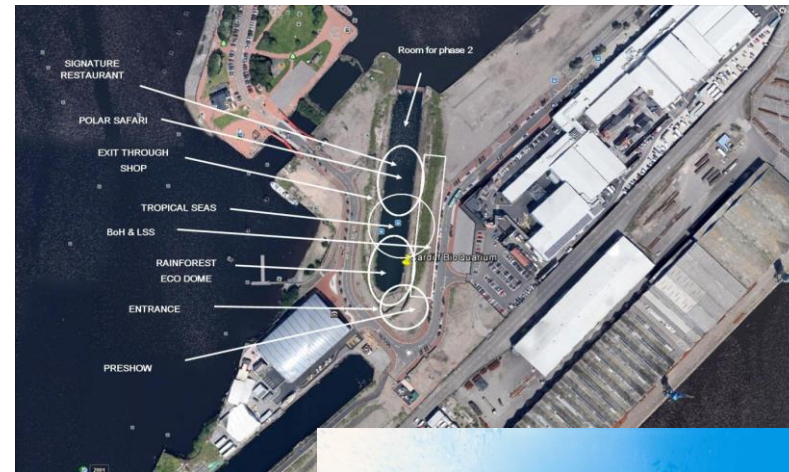
BioQuarium, Cardiff (Wales)

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 and also, supporting their development of the Palm Mall Aquarium, currently under construction in Oman and due to open in 2018.



Melaka Alive!, Melaka (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 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 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, which opened in 2015.

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



World of Discoveries, Porto (Portugal)

Leading Portuguese tourism services company, Douroazul Lda. acquired 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)



Discovery Island Theme Park, Lisbon (Portugal)

Following the success of the World of Discoveries project in Porto, leisure and tourism services company, Douroazul again appointed Petersham Group and Haley Sharpe Design to take on a much larger project, 'Discovery Island', to be located on an island in the River Tagus just north of the Portuguese capital, Lisbon.

The team developed a **master plan**, and carried out **market analysis** and an **initial feasibility study** to create a brand new destination on an island 8 kms by 3 kms. in size. The project would connect the island to the mainland by bridge, as well as creating a fast ferry service linking it to the heart of the Lisbon water front. The main project anchor will be the 'Discovery island' theme park, planned to be some 65,000 m2 in size and together with a waterpark with indoor and outdoor areas and theme park hotel, will be planned to welcome up to 2 million visitor per annum. Car parking for up to 5,000 vehicles, plus buses will be built. In addition, a retail outlet village, waterside restaurants, outdoor experience sports area, festival events area and camping and caravan site are planned.

Also on the island, a championship standard Golf Course, and 5* Spa Hotel and Country Club are planned, together with some 20 'Quinta' style residences, each with its own private boat access and mooring facilities, private road access and a direct route into the country club. The island is home to many species of wading birds, including Flamingos, and a Wetlands Interpretation Centre, together with boardwalks to observe the birds in their natural habitats will be built together with a programme of habitat

improvements, as an integral part of the development, creating a new nature reserve and an important educational facility.



Discovery Island Theme Park, Lisbon (Portugal)



Aquatopia, Antwerp (Belgium)

Petersham Group has significant experience in the development and operation of aquarium projects world wide, and are regularly approached by clients interested in both developing such projects and in exploiting them profitably.

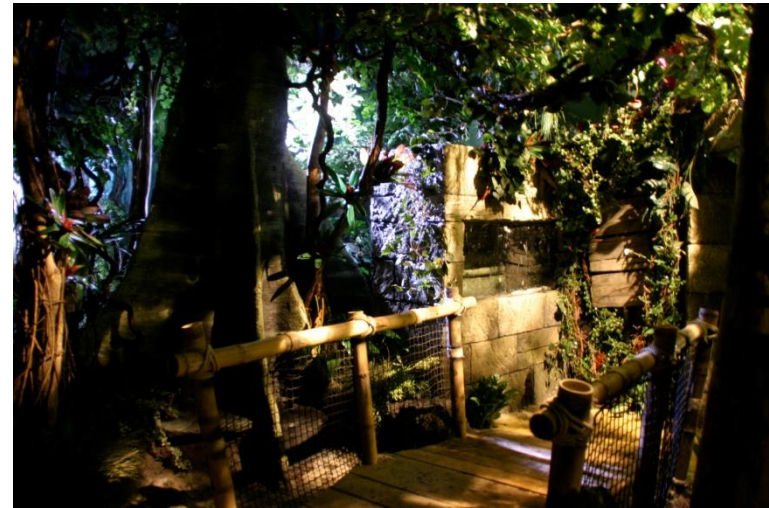
Having project managed the initial design of the project, we provided executive management assistance to Aquatopia, a ground breaking public aquarium attraction located in 3,200 m² of floor space over 3 floors of the Park Plaza Hotel in central Antwerp.

Initial responsibilities included developing a design brief, project management of design development, procurement of key packages, including aquarium tanks, life support systems and theming, and development of operating strategies and budgets.

Subsequent responsibilities 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 zoological implications.

We went on to further develop the marketing strategy, advise on the retail merchandise range, human resource planning, a food and beverage strategy and 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.



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.

Petersham Group subsequently carried out an independent valuation of the company on behalf of the owners.

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 iconic attraction or attraction cluster on the CLQ site to draw 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 turned to the identification of leisure development concepts that would suit the CLQ, whilst complementing the already diverse range and significant number of existing attractions in Blackpool.



Extensive reference was also made to new and emerging leisure development schemes elsewhere in the UK and internationally. Following a workshop session in which site master-planning options were reviewed and assessed as series of soft market testing discussions were held with potential developers, operators and interested parties.

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 other leisure & entertainment facilities.



Madeira Story Centre (Madeira)

Located in central Funchal, the 'Madeira Story Centre' 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.

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

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 and the Story Centre celebrated its 10th Anniversary in 2015.



Madeira Story Centre (Madeira)



Manor of Groves Hotel & Country Club (UK)

Petersham Group is often retained by specialist planning consultants, or by developers and/or operators direct, to prepare an independent business case to support contentious or difficult planning applications. The provision of such independent but informed evidence within a planning application can significantly strengthen an application's prospects of success.

In this case the 80-room Manor of Groves Hotel, Golf & Country Club wanted to add an additional 63-bedrooms to support its extensive banqueting, wedding, function and leisure business, but being situated in the green belt had been unsuccessful in a initial attempt and planning permission had been refused.

A revised application was proposed adopting a smaller extension, of 42-bedrooms, and Petersham Group was retained to prepare a Business Case demonstrating the economic and business need to add the extra bedrooms. The business case was duly compiled and the application re-submitted and was successful, due in no small part to the Business Case made for the extension.

This is not untypical of assistance that Petersham Group is asked to provide to assist businesses in the submission of planning applications in difficult situations.



Northumbria Thrills (UK)

Northumbria Thrills, to be located in Northumbria, UK, is designed by owner and developer, Active Leisure Resorts Ltd. with the intention of it becoming one of 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**



Houses of Parliament, London (UK)

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 clients



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