



## Credentials Presentation December 2018



## Petersham Group

**Petersham Group: a specialist leisure consultancy working across the Experience Economy.**

Established in 2003 and run by its two founding directors - Jonathan Rounce and Keith Thomas - who jointly have nearly 70-years experience in the international leisure industry, both as consultants and as developers and operators of visitor attractions.

Our team's 'hands-on' experience embraces the development and management of museums, visitor attractions, family entertainment centres, historic & heritage properties, hotels and restaurants.

This gives us a broad and dynamic base from which to identify emerging trends & to identify the benchmarks of success (& of failure).



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

## Petersham Group

We have completed over 80 consulting projects worldwide.

Our work is truly international, recent projects have been located in Portugal, China, Kuwait, Estonia, Finland, Germany, Kenya, Malaysia, Mauritius, Vietnam, Egypt, Sweden and the USA, and the UK

Clients include:

Local and national government

Entrepreneurs

Investors & banks

Developers and operators of museums

& visitor attractions

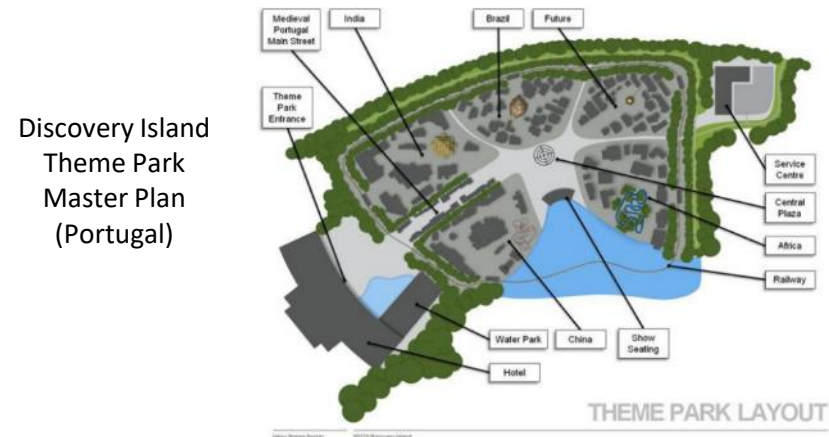
Architects & designers

A range of other entities across the private, public and not-for-profit sectors

As such we are often asked to speak on aspects of the Experience Economy to conferences and seminars



Treesurfers  
High Ropes  
Course (UK)



Madeira Story  
Centre  
(Madeira)



## Our work

### What do we do?

the majority of our assignments fall into one of the following categories:

- Project management of attraction & leisure development;
- Options appraisals;
- Feasibility Studies
- Business planning & financial modeling;
- Master planning advice
- Funding advice & assistance (including validation of business propositions);
- Operational consultancy;
- 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**



London Thrill  
Park, Las Vegas



Houses of  
Parliament,  
London



Vinpearl Resort  
Phu Quoc,  
Vietnam



Sheikh Abdullah Al Salem  
Cultural District, Kuwait



Aquatopia,  
Antwerp

# 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, contractual structuring and management of leisure projects.
- Leisure Trends
- Sustainable tourism



### 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. Delivered 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 (2016 - ongoing)
- London UK. Development of a detailed business plan and operating strategy for a new visitor attraction planned for The O2 at North Greenwich, showcasing an internationally renowned premier sports league (2018 – 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)
- London, UK: Project to evaluate the potential to locate a new visitor attraction at the top of one of the city of London's iconic buildings (2017-18)
- Bognor, UK: Expert Leisure input to a multi-disciplinary team commissioned by Arun District Council to examine the redevelopment potential of 2 key town centre sites & develop a concept masterplan as a pre-cursor to seeking development partners. (2017- ongoing)
- 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, initial management new attraction (Opened 2005)
- Lecturer in Sustainable Tourism Management, Business School, University of Exeter (Ongoing)



# 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, following the successful 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

## Silverstone Heritage Centre (UK)

The £18.2m Silverstone Heritage Experience project is scheduled to open in 2019, comprising a 6,000m<sup>2</sup> new build project at the F1 circuit. Prince Harry visited the site in March 2018 to initiate the start of construction.

Petersham Group worked closely with the client, the British Racing Drivers Club & with attraction designers, Mather & Co. on the project, preparing a 'Key Assumptions & Indicative Financial Outcomes' document as part of a Round II UK Heritage Lottery Fund (HLF) bid & subsequently, carrying out a Business Planning exercise which led to a £9.1 million grant award from HLF.





## Sheikh Abdullah Al Salem Cultural District (Kuwait)

The Sheikh Abdullah Al Salem Cultural District is located on a 13 hectare site. It houses 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.

Petersham Group, provided a programme of Operational and Institutional Planning Consultancy to the project helping the project team to plan the future management of this project & to make key decisions regarding operational matters during the development phase.

Tasks have included reviewing the potential market demand for the project & developing an operating strategy to work within the context of the current architectural and exhibit design.





## Little London (UK)

In 2011, Petersham Group were retained as commercial & development consultants by a team planning the creation of a major new visitor attraction in the heart of London, based around a 2,600m<sup>2</sup> living model (scale 1:175) of central or 'visitors London 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'.

Initially retained to identify and evaluate potential sites for the project, our focus moved on to preparing a comprehensive business plan and underlying financial model to support the project's design development and fund-raising, starting with a thorough evaluation of the wider London visitor attraction market.

An ideal site was identified (at One, Tower Bridge) and the business plan was independently and exhaustively examined by prospective investors, receiving comprehensive endorsement as robust, realistic and deliverable. Despite being selected as the preferred option by the site developers, the project did not progress further due to a number of irreconcilable differences between the founders.



## Il Monte Galala Resort, Al-Sokhna (Egypt)

Egyptian developer, Tatweer Misr is constructing the Il Monte Galala resort with the aim of it becoming the premier coastal resort destination on the Gulf of Suez.

Utilising stunning mountain and coastal topography, a new resort is being created 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.

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, taking advantage of the coastal location, which will be success drivers for the resort, creating a distinctive identity and character for Il Monte Galala.





## Kelmscott Manor (UK)

The property, which was the summer home of designer, William Morris from 1871 until his death in 1896, has been developed progressively as a visitor destination in the beautiful Oxfordshire countryside but requires major capital investment.

Funding to implement the vision for the development was sought and achieved from Arts Council England, The Architectural Heritage Fund, and the Heritage Lottery Fund together with a number of supportive charities and foundations.

To support the grant applications the Society assembled a consultant team to work alongside their in-house project board with Petersham Group undertaking all the business planning and associated modelling work.

As a result, a £4.3m, Round 2 grant from the Heritage Lottery Fund, was secured in October 2018





## Gardens by the Sea, Bognor Regis (UK)

A dramatic new regeneration project is planned for the historic south coast resort of Bognor Regis. The concept is the creation of a year-round coastal destination, 'Gardens by the Sea', anchored by a 3,000m<sup>2</sup> Winter Gardens and a new Theatre and cultural centre.

Petersham Group has worked with a team including Urban Delivery, Arup and Kay Elliott Architects to inject compelling but sustainable leisure concepts into a scheme which includes a hotel, retail and restaurants with views of the sea & a roof garden/performance space above the new theatre.





## Vinpearl Resort & Waxworks Attraction, Phu Quoc (Vietnam)

**Vingroup JSC** (Vingroup), ranked amongst the leading real estate and tourism business groups in Vietnam, are developing over 3,000 Hectares of land located at the northern end of Phu Quoc Island, off the south coast of Vietnam.

In November 2014 they completed the first phase of development, known as the Vinpearl Phu Quoc Resort. Planning has now commenced for Phase 2, which will establish Vinpearl Phu Quoc as a major resort.

With our input, Vingroup is now focusing on developing ideas for an entertainment complex which will include a 'World Showcase of Culture and Cuisine' and a range of attractions including a Waxworks Attraction of a size and standard similar to Madame Tussauds. Petersham Group completed a **feasibility study for the Waxworks Attraction** and has made a range of recommendations regarding its design, development and operation.



## Houses of Parliament, London (UK)

As one of the most iconic buildings in Britain, the call to help determine how the Houses of Parliament could be opened up to the general public was a challenge that was too good to resist!

Tasks include establishing how the public could be guided through the Palace of Westminster, balancing the influx of thousands of tourists within a very busy and security focused complex & ensuring that the operation of Parliament and the rights of access and movement of all Members and Officers were preserved.

We also advised on establishment of a Central Ticket Office & on the allocation of guides for all tours within the Palace of Westminster.

The tour is now an established part of the Parliamentary programme with over 1 million visitors a year.





## Malmö South (Sweden)

The South-western province of Sweden, Skåne attracts over 3 million tourists annually and has around 1.3 million residents: both are growing year on year.

Region Skåne commissioned Petersham Group to analyse the Skåne region & to identify the best location to develop a leisure destination with regional appeal to this market and neighbouring Denmark.

We assessed likely market demand for visitor attractions in Skåne generally and Malmö specifically, 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.

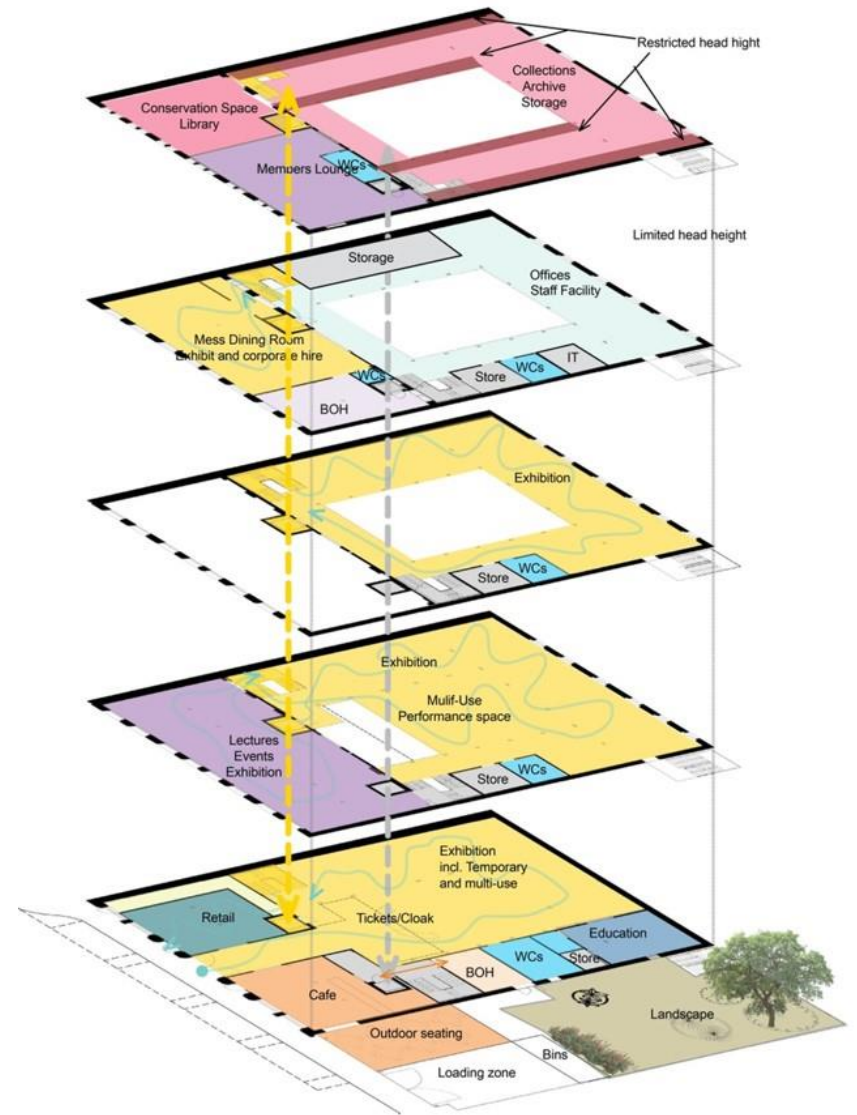
The main output of this exercise has been to create a development brief, supported by market analysis, summarised in a brochure created for potential investors and operators of attractions at the site.



# Royal Irish Regimental Museum (Belfast)

A project which has required great sensitivity, to investigate and assess options to consolidate the 4 regimental museums of the Irish Regiments of the British Army in Northern Ireland into one museum on two sites, telling the story of the Irish Soldier in the service of the British Army

Petersham Group completed an Options Appraisal to recommend the best location and format for the museum going on to deliver a full feasibility study and design brief for the project, demonstrating how a sustainable outcome could be achieved. Acquisition of a site in central Belfast is currently being negotiated.





## London Fire Brigade Museum (UK)

In 2017, Petersham Group researched and delivered a detailed business plan for the new London Fire Brigade Museum which is to be sited within the former London Fire Brigade HQ building on London's Albert Embankment, alongside the River Thames.

The development of the new museum is part of a major PPI regeneration scheme of the property owned by the London Fire and Emergency Planning Authority that is being undertaken by U+I Group Plc.

The new museum is due to open in 3 years time and will feature views into the neighbouring working fire station.

In the meantime, the museum is currently running as a pop-up in a space that used to be a fire engine garage, The Workshop located on Lambeth High Street.



## Madeira Story Centre (Madeira)

An €8 million development, 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.

Initially we were contracted to assess the project's prospects through the preparation of a feasibility study and business plan.

Petersham Group were then contracted by owners, Blandy Group SGPS as project directors and coordinators for the development and subsequent operation of their project.

The Centre opened in 2005 and continues to offer a great visitor experience.





## Sea Life Centre Aquarium (Porto)

Merlin Entertainments the world's second largest leisure company, engaged Petersham Group to work with them to identify the right location and site for their first Sea Life aquarium project in Portugal.

Using our local contacts, our knowledge of the Portuguese leisure market and CEO, Keith Thomas' long experience of the public aquarium sector, a suitable site was identified in Porto

We went on to help Merlin to secure a lease, gain the necessary consents and building permits and obtain over 30% in grant funding assistance for the project.

The project was built and launched to great acclaim, opening in June 2009.



## Osea Island

A privately owned island in the Thames estuary with world-renown recording studios.

Known as a perfect location for events, weddings, holiday lettings and festivals, all year round.

Petersham Group produced a development plan to evolve and support the refinancing of the business as a unique events and wedding venue and as an exclusive holiday destination



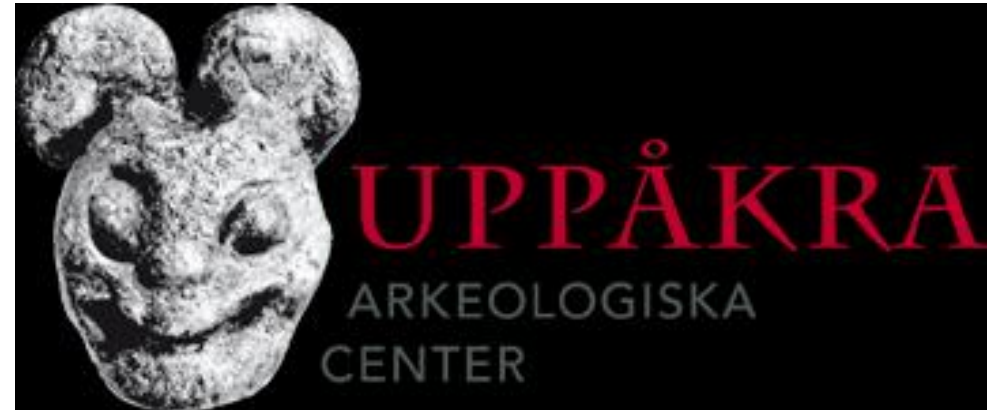


## Uppåkra Arkeologiska Center (Sweden)

Initially contracted by the University of Lund to help develop their vision for the project, Petersham Group then worked with the project leader to run a series of workshops bringing together all of the stakeholders in the project.

Outputs included development of a mission statement, overseeing the agreement of the aims and objectives of the project and development of terms of reference for a design brief that took into full account the needs of all users and visitors to the site.

We went on to carry out an Options Appraisal to guide the project team in making future choices regarding the design and execution of the project.



## Melaka Alive!, Melaka (Malaysia)

Located in the centre of the historic old town of Melaka in Malaysia, a designated UNESCO World Heritage site, Melaka Alive! is a new 'Heritage Park', developed and operated on behalf of the Malaysian government by Pekan Legasi Sdn Bhd .

The project comprises the creation of a brand new water-based multi-media show, using fountains, water screens, projection and live actors, telling the story of the country of Malaysia from founding through to independence staged on the deck of a specially constructed Malay ship, together with the upgrading and re-positioning of 5 of the museums previously owned and operated by the city.

Following a scoping study carried out in 2012, Petersham Group were retained as development and operational consultants to advise on developing this concept, on the master planning and on the operation of Melaka Alive!.





## Some of our clients



## Contact us

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