

APPENDIX 2

“Visitor Attraction Consultants” Report

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Proposed development of Horkesley Park, Essex.

Visitor Attraction Consultants (VAC) has been engaged to briefly provide an overview of a paper entitled 'Horkesley Park Heritage & Conservation Centre' authored by Andy Sykes, dated December 2008. VAC benefits from over 15 years in the direct management, operation, marketing and development of UK heritage-based visitor attractions, and thus can bring a practical perspective to bear on these proposals.

The project at Horkesley Park, Essex, is a new-build visitor attraction in 117 acres. It comprises a diverse set of loosely related historical and environmentally-based experiences and displays on subjects such as horse breeding, a warren to watch animals in their nests, displays relating to a undefined past (what, if anything, *is* known of the Deserted Medieval Village, the subject of a virtual reality display?), local customs, crafts and stories, some newly established gardens, and the hope to display pictures by Constable (yet to be acquired).

New-build attractions generally

Building visitor attractions from scratch is difficult at the best of times, even in places where there are already visitors. A starting point always is to provide a unique and clear-cut concept of mass appeal – an attraction based on a subject matter that needs to be explained in any depth will always struggle.

Examples of recent major success are Cornwall's 'Eden Project', Hull's 'In deep', or Rotherham's 'Magna'. The uniting characteristics of these projects are that they are all easy to understand and each reflect the well-known characteristics of the area in which they are located.

Created Visitor Attractions of the past that did not follow this format include Doncaster's 'Earth Centre' and Sheffield's 'Centre for Popular Music'. Both went disastrously wrong and closed as visitor attractions within a short time despite high profiles, enormous marketing budgets and highly professional operations.

The core concept.

Horkesley Park has it seems no natural environmental or heritage assets of any worth. It seems to have no extant reputation as a destination, no brand awareness or pedigree and is completely created.

Spending on all-important 'interpretation' is a minor element of spend in the proposals, set at £500,000 (6.1, page 155). Over half the proposed investment (£15m

of the £24m) is to be spent on the main building, and the majority of the rest on ancillary buildings, roads, paths, car parks or plant. Only some £3m (12.5%) is being spent on visitor-facing elements – or ‘things to see and do’. These elements include gardens, the warren etc. (page 156, Table 21 ‘Costs’).

In our experience, people don’t pay to visit modern buildings, they pay to experience the things within them or features outside them, like gardens. Thus in our view, the spending balance is wrong with most investment diverted into modern buildings rather than customer experiences.

We suggest that the proposals needs a stronger, more compelling theme with a linking narrative to unite the many different displays. This would give it stronger PR-potential and marketability. It needs a Unique Selling Point (USP), and we would be concerned at this stage that those elements one might consider currently as ‘star attractors’ (such as a display of Constable paintings) are doubtful in their delivery (nothing is said on how the paintings will be secured for display).

Visitor potential

Creating successful Visitor Attractions within locations that people want to visit is difficult enough. This difficulty is compounded in an area not known as a visitor destination, and page 16 (and *passim*) acknowledges that Essex is not yet well established in that regard. To create a tourist economy for an area requires a critical mass of distinctive ‘Superstar attractions’, set within countryside widely known to be distinctively attractive and different with a defined and well-known reputation. Also required is the associated infrastructure including good transport links, a range of accommodation types (not just hotels), a range of eateries etc. The proposals at Horkeley Park are unlikely to be considered to have the appeal of a ‘Superstar Attraction’ (Page 66) and in our view are unlikely to do much (if anything) to assist Essex become a destination.

Visitor numbers

We feel that there are a number of factors that should be modified to give this project any hope of success.

1. A more reasonable headline adult price is charged. We suggest this be set at £5.00 (inc VAT) for a simplified all-inclusive ticket to all parts of the attraction. This is based on the appeal of the proposal and its reputation. Length of stay is not a factor in determining price – short stay attractions like the Jorvik Viking Centre in York can command £8.50 for a maximum of 20 minutes (42.5p per minute), whilst places like Shugborough (Staffs) with a 3 hour minimum visit cannot sustain a headline price of more than £12.00 (6.5p per minute), and iconic, well-known sites like Castle Howard (North Yorkshire - 2 hour minimum visit) can command an adult price of £11.00 (9p per minute).
2. A greatly refined and simpler core appeal is devised/defined with a linking narrative.
3. A much greater proportion of the budget is spent on ‘interpretation’.
4. A sufficiently inspired marketing and PR campaign with a large enough start-up budget is ear-marked.

If this is done then:

We would suggest that between 100,000 and 150,000 visitors might be achieved after 3 years (word of mouth recommendation takes time to build). If the above are not done we feel 40-50,000 visitors is a more realistic expectation based on appeal/price/marketability.

This view is based on our direct experience of running the historic site of Shugborough (Staffordshire). The site:

- is well established, but little known.
- benefits from Royal associations (it is Lord Lichfield's ancestral home).
- has considerable heritage assets (an internationally important set of garden monuments).
- offers a complete range of historic buildings, interpreted using costumed guides.
- is within 1.5 hours drive time of 20m people.
- is situated only 7 miles from the busy M6 with 'Brown Signs'.
- is located within the Cannock Chase AONB and in attractive countryside, BUT is not in an area with a developed tourism industry and thus,
- the area is not considered a visitor destination.

Visitor numbers are only just over 100,000 (events such as concerts are not included in this figure).

In contrast Castle Howard (North Yorkshire) was also run by the author and:

- has a better known pedigree (home of 'Brideshead Revisited' for example).
- houses internationally acclaimed art treasures.
- is itself of the highest architectural merit.
- Is in a tourist area (near York, The North York Moors and Scarborough and the East Coast).
- benefits from 'Brown Signs'.

Yet this great house can only command 200,000 visitors (excluding special events).

Horkesley Park (and its area) has apparently:

- no established pedigree or reputation.
- no natural or heritage assets.
- no reputation as a destination amongst tourists.
- some similarities to Shugborough (but is poorer in terms of assets).
- None of the advantages of Castle Howard in terms of pedigree and reputation.

With work (and a lower entry price) thus we feel it might attract a similar number of visitors as Shugborough, but, even with a lower entry price, will be unlikely to enjoy the visitor numbers of Castle Howard.

Incomes from all sources

Based on our experience and taking into account promotional discounting (2 for 1 offers, 'kids go free' etc.), an adult headline price of £5.00 (inclusive of VAT) might result in an average admissions spend per head (sph) income of between £2.50 and £3.00. A sph is achieved by dividing all visitors (including repeat visitors, such as Season Pass holders), by the income derived.

With an inspired and distinctively different retail range, we might expect to see a merchandise spend per head of between £1.50 and £2.00, depending on the location of shops viz a viz main visitor flows. This, and all other sph levels are based on our knowledge of retail sph levels at a range of heritage-based attractions of differing status.

Catering spend per head may be calculated as approximately between £1.00 and £2.00 depending on the quality of the food offered (its very doubtful this project could sustain the range of eating places proposed, particularly at the numbers of visitors we think could be achieved).

Other discretionary spending such as plant centre and farm shop sales, carriage rides might yield between £2 and £3 at most, depending again on the quality and presentation of merchandise provided and the location of facilities.

It is unlikely in our experience that all visitors will shop at all facilities (or even most facilities). A relatively small proportion of visitors to Castle Howard went on to shop in the associated Plant Centre, which drew the majority of its income from local people who didn't visit the attraction.

Total maximum average sph levels thus we calculate as:

Admissions	£3.00,
Retail	£2.00,
Catering	£2.00,
Other (Plants, Farm shop etc.	£3.00,
Total	£10.00.

With 100,000 visitors this equates to an income of £1,000,000 pa. The VAT element (included above) would reduce this figure.

By Year 3, with the above measures in place, one might expect an additional 10,000 people might be tempted by a Season Pass, at say £15.00 average price (adult headline thus £20). This might create an additional 30,000 visits pa, but little more secondary spend (such returnees rarely spend much).

Our opinion

We conclude this is not a viable project, and should be reconfigured (or abandoned). The Business Plan as presented to us is unrealistic and we are surprised that a lender is willing to invest on such a scale.

It may be that this project would stand a greater chance of success if it abandoned the idea of being a visitor attraction with a paid-for element, but instead positioned itself purely as a retail development – in effect a 'Shopping Village' with no admission charge. This was the approach taken at Trentham Gardens (Stoke on Trent), where a historic garden was opened with a small charge, achieving modest visitor numbers. The front end (and the part accessed by the majority of visitors) is the huge garden centre and the critical mass of up-market shops that has undoubtedly made the project financially viable and gives the site value.

Richard Kemp, for Visitor Attraction Consultants – 16th April 2009.

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