CONSULTAL
www.consultal.pt

ATTRACTING VISITORS to VISITOR ATTRACTIONS

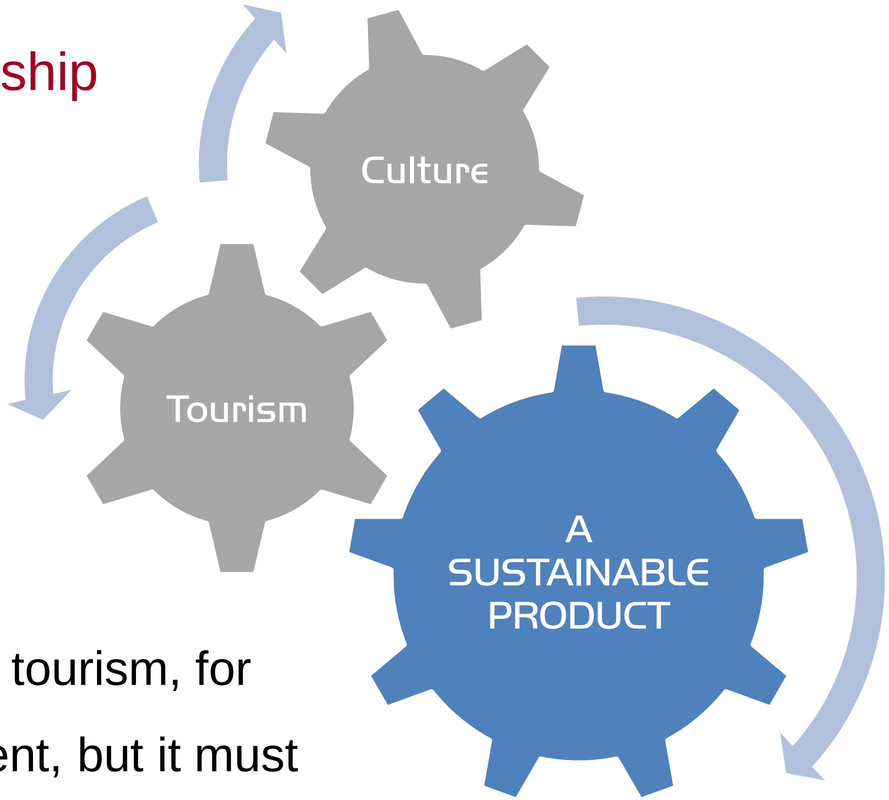
Summer Lab

August 2012

Simon Punter

Tourism & Culture

the symbiotic relationship



"culture can be justified for tourism, for industry, and for employment, but it must also be seen as an essential element in preserving and enhancing national pride and spirit."

World Bank President

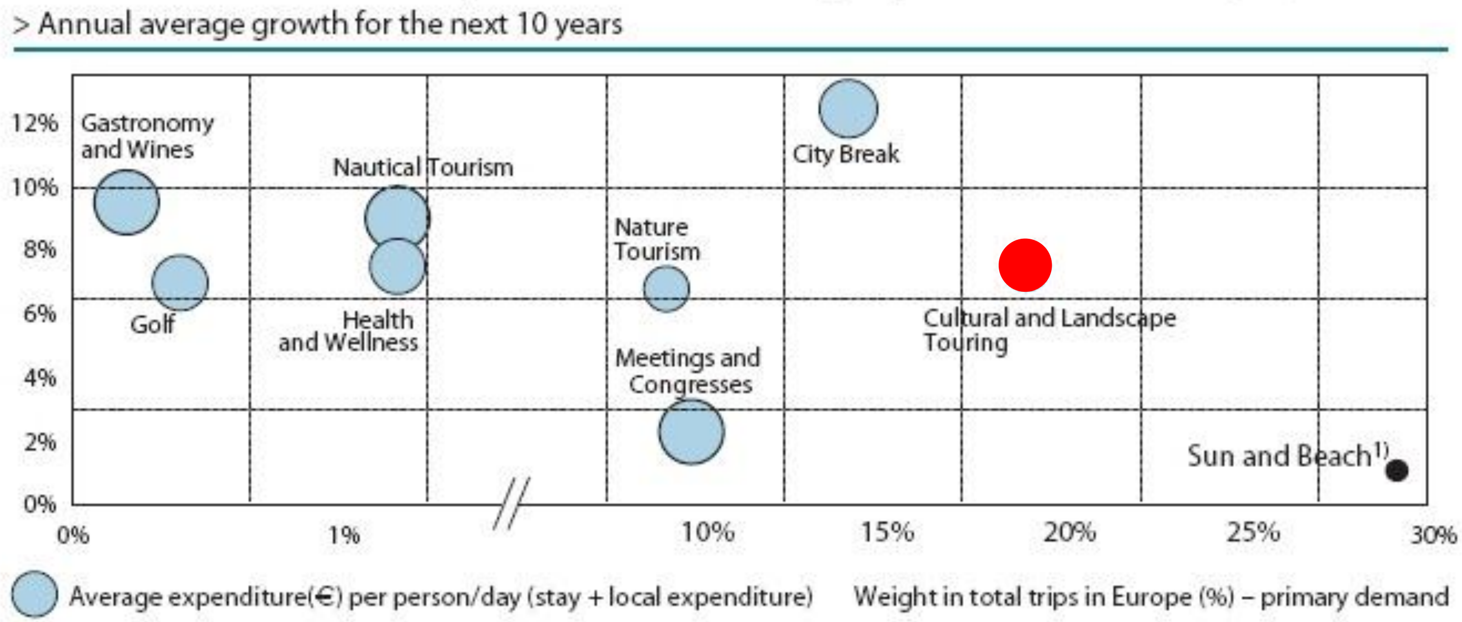
James Wolfensohn 1999,

CONSULTAL
www.consultal.pt

Tourism & Culture

the symbiotic relationship

Tourism evolution in the European market (strategic products for Portugal; 2004)



1) Average expenditure levels not available

Note: For Residential Tourism and Integrated Resorts there is no information on the weight in total trips in Europe, however we know that around 3 million Europeans own tourism accommodation property abroad and that this market has forecast growth of 8 – 12%/year

Source: Portugal National Tourism Authority

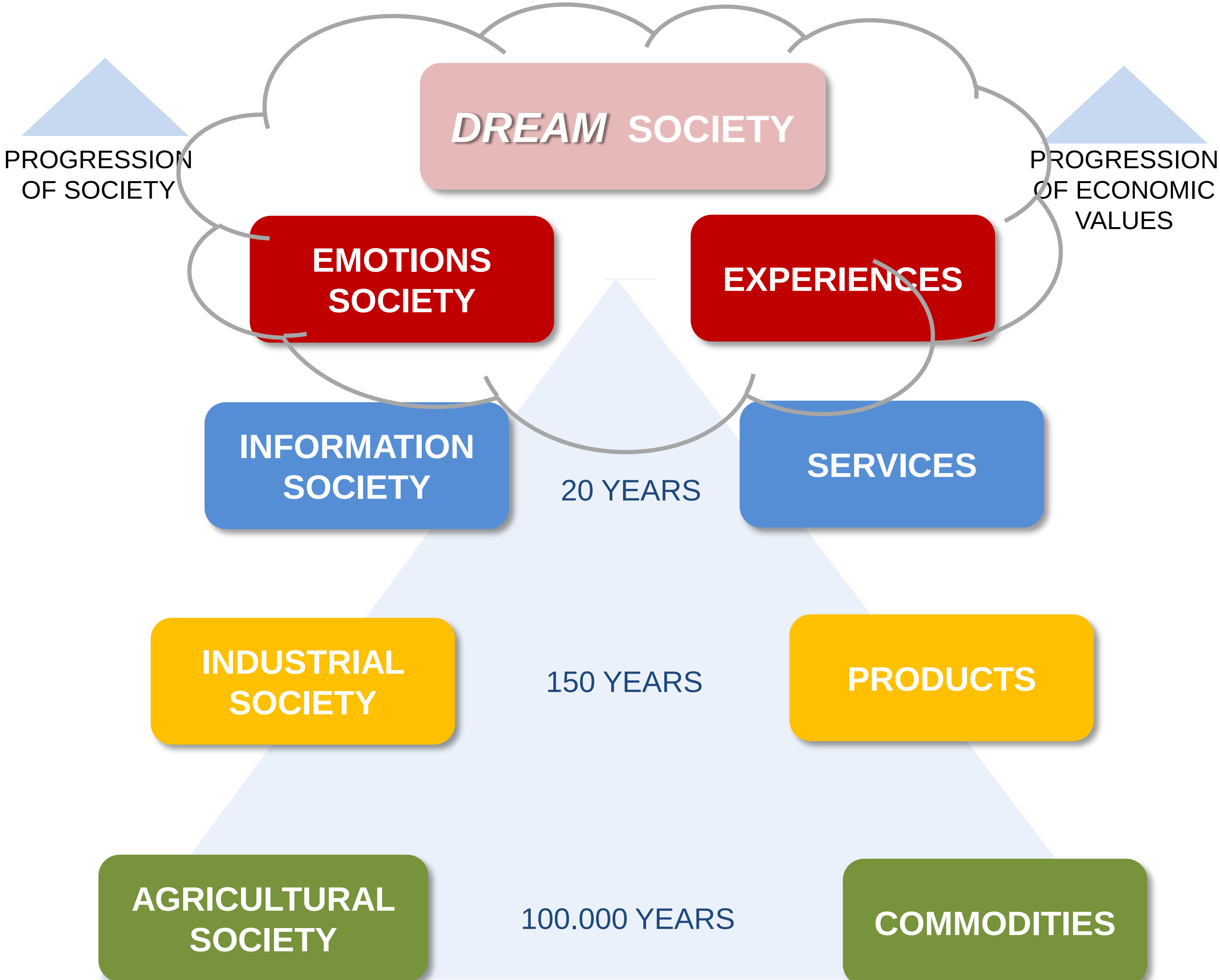
Summer Lab

August 2012

Simon Punter

GROUP

CONSULTAL
www.consultal.pt



Summer Lab
August 2012
Simon Punter

GROUP ILM

visit Britain

Introducing

Our Promise To Visitors

The National Code of Practice for Visitor Attractions

For the purpose of the charter a visitor attraction is defined as:

"A permanently established excursion destination, a primary purpose of which is to allow public access for **entertainment, interest or education**"

Summer Lab

August 2012

Simon Punter

GROUP ILM

VISITOR EXPERIENCES

ENGLISH HERITAGE

Visitor Attraction?

WHAT WE DO

⟪ Up to About Us

English Heritage exists to make sure the best of the past is kept to enrich our lives today and in the future. Click on the boxes to discover the range of work we do.

UNDERSTANDING

By understanding historic places we value them.

Find out more

ENJOYING

By enjoying historic places we want to understand more about them.

Find out more

VALUING

By valuing historic places we care for them.

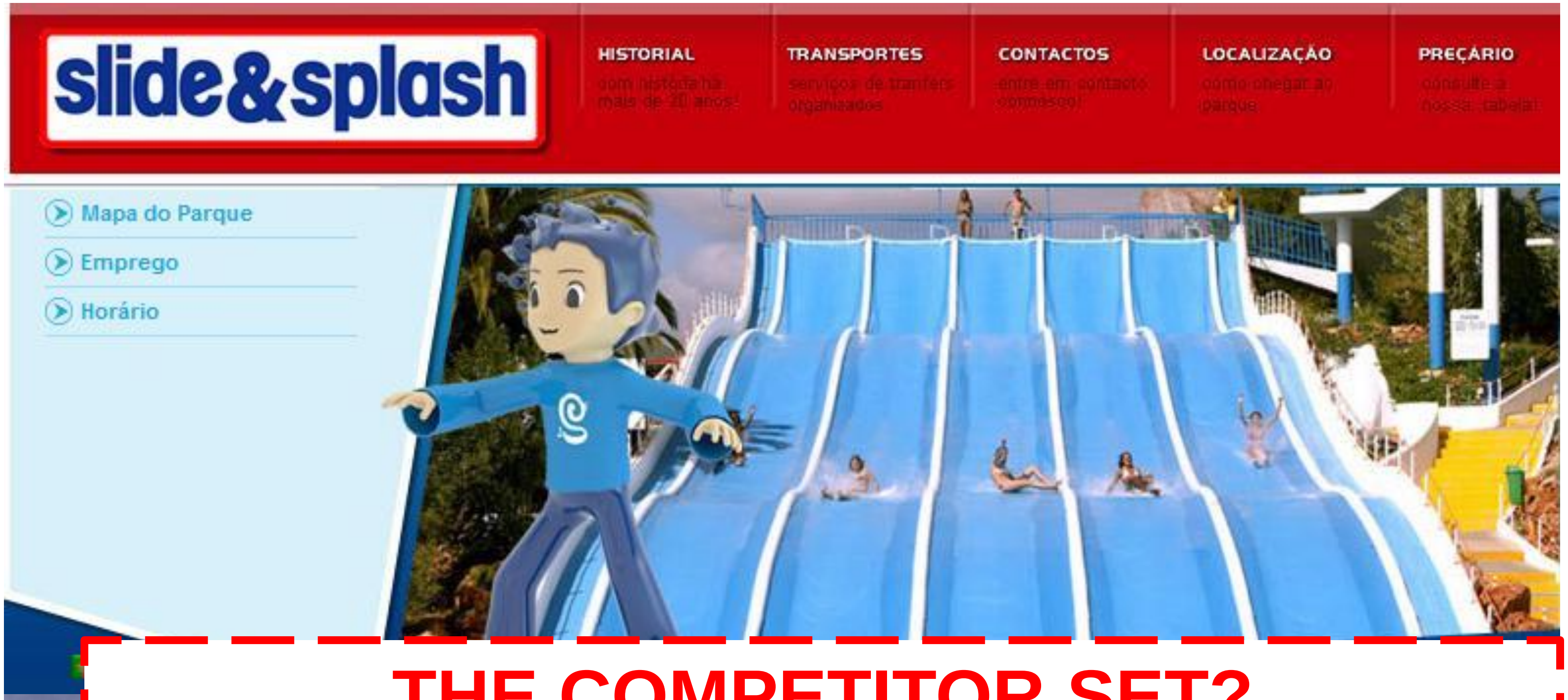
Find out more

CARING

By caring for historic places we create an enjoyable environment.

Find out more

CONSULTAL
www.consultal.pt



THE COMPETITOR SET?

Summer Lab

August 2012

Simon Punter

GROUP ILM

3.1 England visit trends 2008-2009 by attraction category

Table 3.1 England visit trends 2008-2009 – by attraction category (%)

Category	Attractions sample	Increase	No change	Decrease	% Change 09/08
Country parks	(45)	62%	27%	11%	+2
Farms	(58)	67%	16%	17%	+6
Gardens	(106)	80%	6%	14%	+10
Historic houses/castles	(342)	77%	5%	19%	+12
Other historic properties	(111)	66%	8%	26%	+1
Leisure/Theme parks	(35)	74%	6%	20%	+1
Museums/Art Galleries	(600)	57%	%	34%	+3
Steam/heritage railways	(29)	76%	3%	21%	+7
Visitor/heritage centres	(75)	63%	13%	24%	+5
Wildlife attractions/zoos	(88)	57%	15%	28%	+2
Workplaces	(52)	40%	31%	29%	+2
Places of worship	(103)	64%	19%	17%	+6
Other	(162)	64%	15%	21%	+9
England	**(1,806)**	**64%**	**11%**	**25%**	**+5**

CONSULTAL
www.consultal.pt

FOOTFALL

Summer Lab

August 2012

Simon Punter

OPPORTUNITY - VISITOR ATTRACTIONS

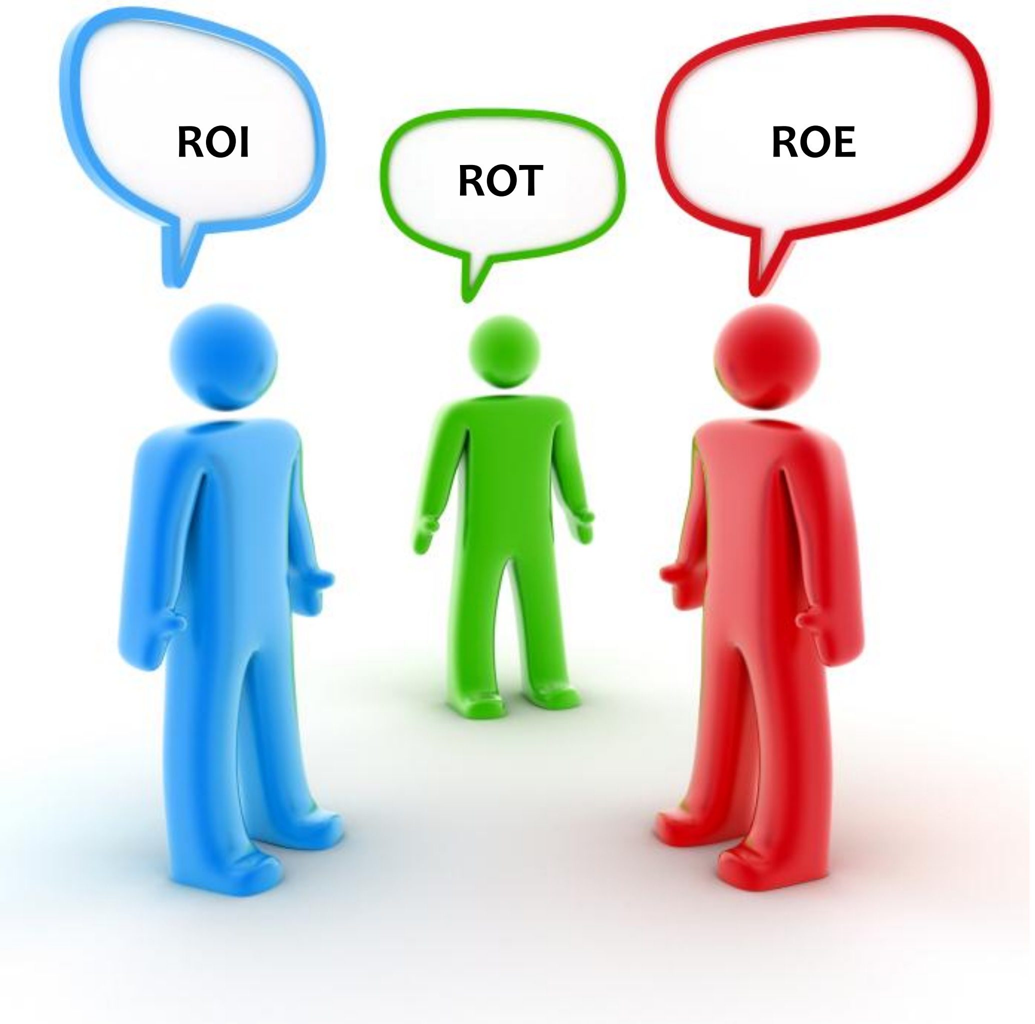
Why is the timing now right in Portugal?

1) The Experience Economy
2) New economic reality
3) New commercial drivers
4) Priorities in society
5) Show socio-economic impact
6) Contexts for an anchor
7) Courage to try?
8) Political Drivers

CONSULTAL
www.consultal.pt

OPPORTUNITY - VISITOR ATTRACTIONS

1) The Experience Economy



"Heritage Tourism is the UK's 5th. largest industry"

VB Sandie Dawe 2011

"….its [heritage sector] important economic contribution has not been sufficiently understood"

HLF Jenny Abramsky 2010

Summer Lab
August 2012
Simon Punter

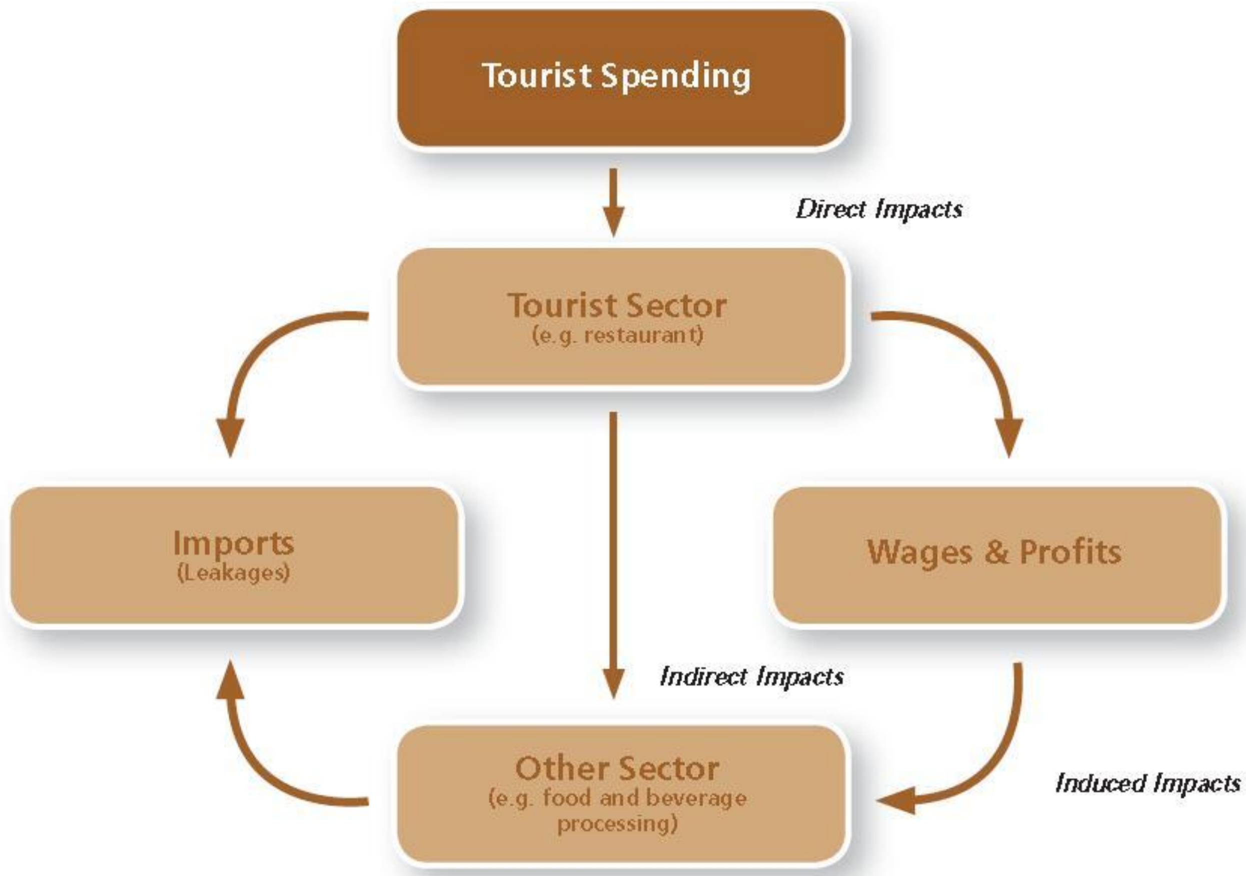
GROUP ILM

OPPORTUNITY - VISITOR ATTRACTIONS

2) New Economic Awareness

OPPORTUNITY - VISITOR ATTRACTIONS

2) New Economic Awareness



2 Figure 1-1: The multiplier effect (Lindberg et al., 2001)

MULTIPLIER EFFECT

22nd. August 2012

The Telegraph

Eiffel Tower worth £344 billion to French economy - or six Towers of London

The Eiffel Tower has been declared the most valuable monument in Europe - worth 435 billion euros (£343 billion) to the French economy, a new study claims.

The 1,050ft tall Eiffel Tower - built in 1889 - is also Europe's most visited monument, attracting almost eight million tourists a year Photo: Alamy

OPPORTUNITY - VISITOR ATTRACTIONS

2) New Economic Awareness

ENGLISH HERITAGE

Multiplier Effect:

- Every £1 invested in the historic environment directly contributes on average £1.60 to the local economy over a ten year period.
- For every £1 invested in heritage attractions an extra £1.70is generated in the wider economy.
- On average half of the jobs created by historic visitor attractions are not on the site, but in the wider economy.

(Heritage Counts 2010)

CONSULTAL
www.consultal.pt

OPPORTUNITY - VISITOR ATTRACTIONS

6) Contexts for an Anchor

CEH

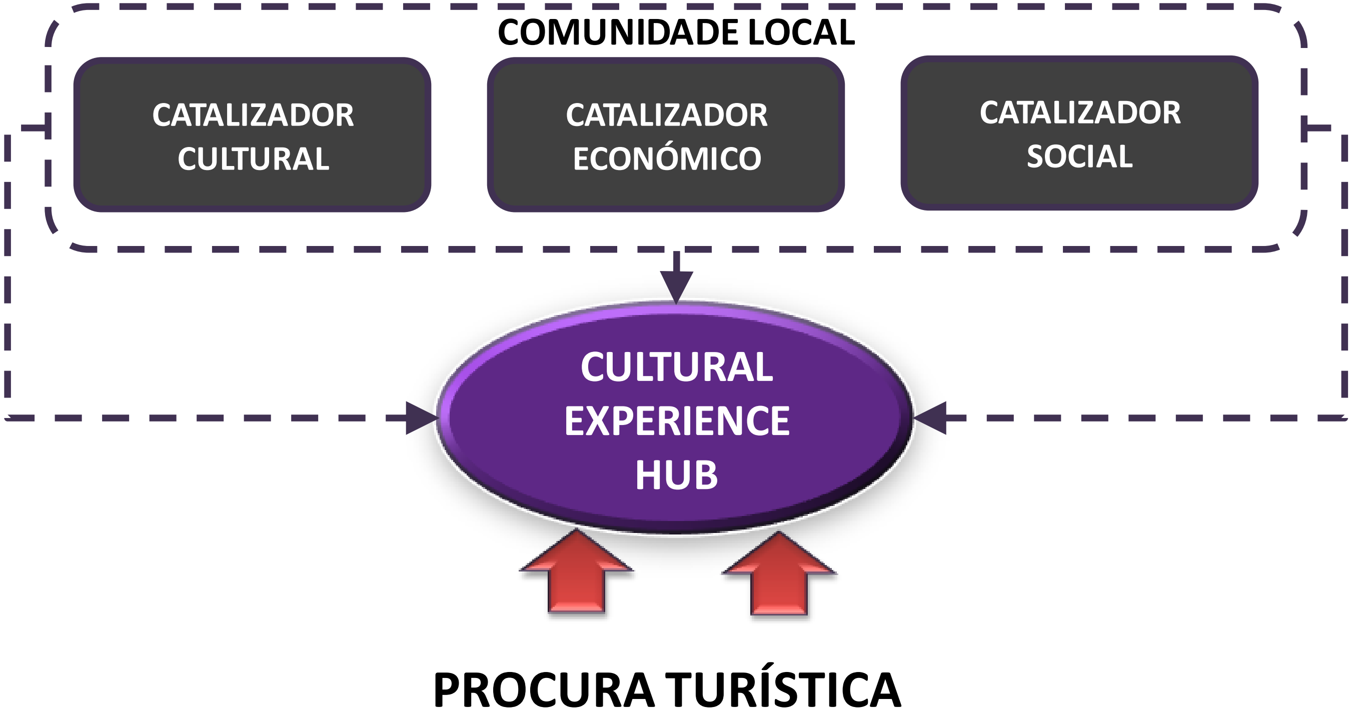
Summer Lab
August 2012
Simon Punter

GROUP ILM

OPPORTUNITY - VISITOR ATTRACTIONS

2) New Economic Awareness

THE CATALYTIC ROLE OF
THE CULTURAL EXPERIENCE HUB



OPPORTUNITY - VISITOR ATTRACTIONS

3) New Commercial Drivers

Necessity, who is the mother of invention.

Plato

The Republic

(427 BC - 347 BC)

OPPORTUNITY - VISITOR ATTRACTIONS

4) Priorities in Society

I must study politics and war that my sons may have liberty to study mathematics and philosophy. My sons ought to study mathematics and philosophy, geography, natural history, naval architecture, navigation, commerce, and agriculture, in order to give their children a right to study painting, poetry, music, architecture, statuary, tapestry, and porcelain.

John Adams

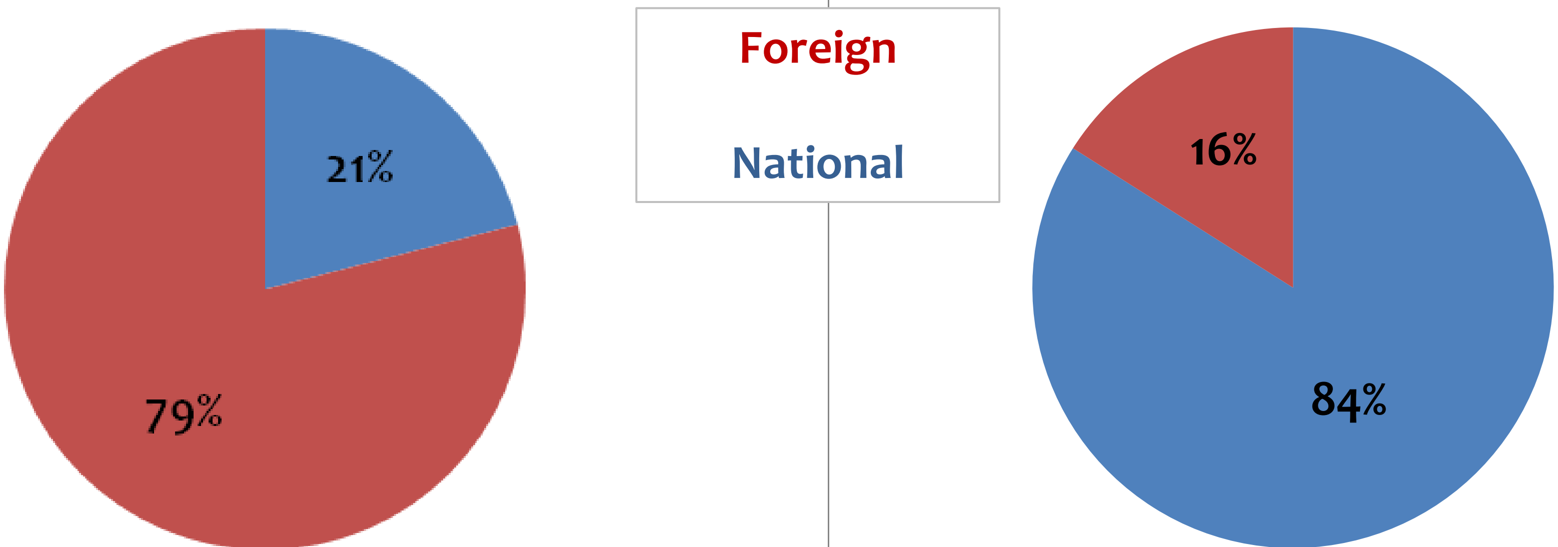
US diplomat & politician (1735 - 1826)

SEMINÁRIO PROMOVER TURISMO

CAPITALIZAR CULTURA

LISBOA, TORRE DO TOMBO 03|12|10

Visitors to Monuments (including World Heritage sites)



PORTUGAL

IGESPAR Monuments

source IGESPAR

UK

Top Ten Heritage Sites

source ENGLISH Heritage

The Cultural & Creative Sector in Portugal – 2010

CONTRIBUTO DOS SUBSECTORES PARA A CRIAÇÃO DE RIQUEZA (VAB)

Subsector	VAB		Emprego	
	milhões €	%	trabalhadores	%
Artes Performativas	144	3,9	6.002	4,7
Artes Visuais e Criação Literária	101	2,7	6.160	4,8
Património Cultural	32	0,9	1.227	1,0
Actividades Nucleares	**277**	**7,5**	**13.389**	**10,5**
Cinema e Vídeo	165	4,5	6.020	4,7
Edição	1.264	34,2	39.793	31,3
Música	7	0,2	219	0,2
Rádio e Televisão	488	13,2	9.914	7,8
Bens de equipamento*	376	10,2	20.071	15,8
Distribuição/Comércio*	388	10,5	16.717	13,2
Turismo Cultural*	221	6,0	7.934	6,2
Indústrias Culturais	**2.908**	**78,8**	**100.667**	**79,2**
Arquitectura	25	0,7	742	0,6
Design	7	0,2	242	0,2
Publicidade	18	0,5	387	0,3
Serviços de Software	25	0,7	2.169	1,7
Componentes Criativas em outras Actividades	429	11,6	9.482	7,5
Indústrias Criativas	**505**	**13,7**	**13.023**	**10,2**
Total SCC	**3.691**	**100**	**127.079**	**100**

* Actividades transversais de suporte ao Sector, autonomizadas p/ efeitos de cálculo

OPPORTUNITY - VISITOR ATTRACTIONS

7) Courage to try?

EXPERIENCES

A ship in a harbour is safe, but that is not what ships are for.

John A. Shedd. 1928

OPPORTUNITY - VISITOR ATTRACTIONS

7) Political Drivers

Economic Impacts

- ✓ Positive impact on poverty reduction
- ✓ Positive impact on national employment levels
- ✓ Positive impacts on total outputs and revenue levels from cultural and service industries
- ✓ Positive impacts on foreign exchanger earnings

Non Economic impacts:

- ✓ Beneficial impact on educational levels and identity cultivation
- ✓ Beneficial impacts on social cohesion, inclusion and social capital development
- ✓ Beneficial impact on continuously enlarging the nation's cultural patrimony
- ✓ Beneficial impacts on safeguarding and substantially conveying the heritage to future generations

Both set of impacts are tremendously important……."

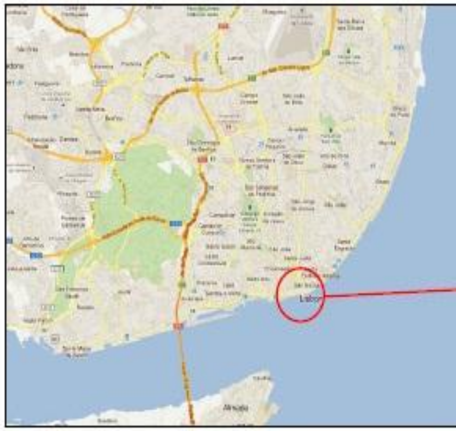
Cultural Heritage and Development – The World Bank

A Case Study

- ✓ A strategic (PENT) “cultural touring” product.
- ✓ Responds to international tourism trends as well as the increasingly important role of culture in providing authentic and memorable experiences.
- ✓ **Tells “stories” based on validated historical data, in an engaging and entertaining way.**
- ✓ A platform for integrating many complementary services such as touristic information, food and beverage, merchandising, educational services, research facilities etc.
- ✓ Oriented for tourism and for the residential and school markets.
- ✓ **With tourism as its initial dynamic, it is a renewable catalyst within the community bringing about potentially important socio-economic multiplying effects and sustainable cultural awareness for future markets.**
- ✓ **The Story Centre is a *visitor attraction.***

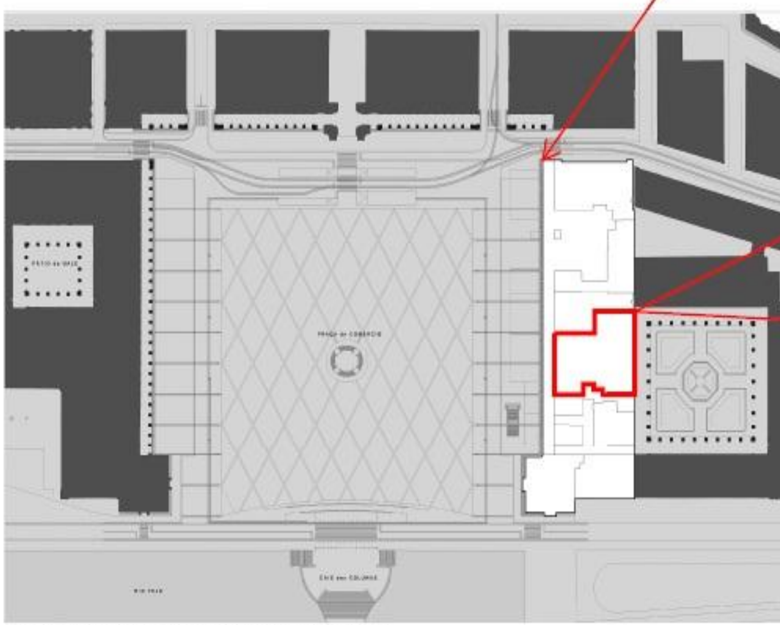
LISBON StoryCentre

CONSULTAL
www.consultal.pt

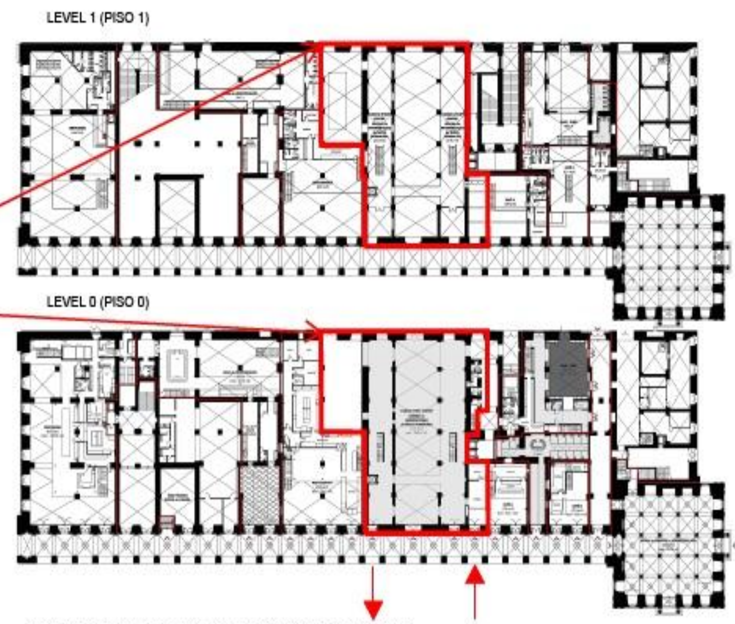


1 SITE LOCATION
KEY PLAN - LISBON Scale N.T.S.

2 SITE LOCATION
KEY PLAN - CITY Scale N.T.S.



1 GENERAL ARRANGEMENT PLAN - SITE LOCATION - LOCATION, SITE ACCESS
KEY PLAN - "SQUARE" Scale N.T.S.



2 GENERAL ARRANGEMENT PLAN - SITE LOCATION - LOCATION, SITE ACCESS
LOCATION PLAN Scale 1:500

Summer Lab

August 2012

Simon Punter

GROUP ILM

"Profit & loss" simulation

Terreiro do Paço
Lisbon Story Centre
Profit & Loss Statement

	Ano 1		Ano 2		Ano 3		Ano 4		Ano 5		Ano 10	
	Euro	%	Euro	%	Euro	%	Euro	%	Euro	%	Euro	%
Nº de Admissões	300.000		270.000		250.000		250.000		250.000		260.000	
Preço Médio Bilhete	5,90 €		6,00 €		6,12 €		6,24 €		6,36 €		7,04 €	
Receitas												
Admissões	1.770.000 €	68,2%	1.620.000 €	64,9%	1.530.000 €	61,7%	1.560.000 €	62,2%	1.590.000 €	62,6%	1.830.000 €	65,4%
Retalho / Loja	600.000 €	23,1%	540.000 €	21,6%	500.000 €	20,2%	500.000 €	19,9%	500.000 €	19,7%	520.000 €	18,6%
Outras receitas / Grupos privados	225.000 €	8,7%	338.000 €	13,5%	450.000 €	18,1%	450.000 €	17,9%	450.000 €	17,7%	450.000 €	16,1%
Total Receitas	2.595.000 €	100,0%	2.498.000 €	100,0%	2.480.000 €	100,0%	2.510.000 €	100,0%	2.540.000 €	100,0%	2.800.000 €	100,0%
Custos Operacionais												
Custo dos Bens - CMVMC	416.250 €	16,0%	462.700 €	18,5%	517.500 €	20,9%	517.500 €	20,6%	517.500 €	20,4%	526.500 €	18,8%
Fornecedores de Serviços	50.000 €	1,9%	50.000 €	2,0%	50.000 €	2,0%	50.000 €	2,0%	50.000 €	2,0%	50.000 €	1,8%
Consumiveis	70.000 €	2,7%	70.000 €	2,8%	70.000 €	2,8%	60.000 €	2,4%	60.000 €	2,4%	60.000 €	2,1%
Total de Custos Operacionais	536.250 €	20,7%	582.700 €	23,3%	637.500 €	25,7%	627.500 €	25,0%	627.500 €	24,7%	636.500 €	22,7%
Custos Não Distribuíveis												
Salários	595.000 €	22,9%	589.050 €	[illegible]	[illegible]	[illegible]	600.831 €	23,9%	610.000 €	24,0%	660.000 €	23,6%
Administrativo e Geral	110.000 €	4,2%	110.000 €	4,4%	110.000 €	[illegible]	110.000 €	4,4%	110.000 €	4,3%	110.000 €	3,9%
Marketing	260.000 €	10,0%	200.000 €	8,0%	150.000 €	6,0%	150.000 €	6,0%	150.000 €	5,9%	170.000 €	6,1%
Energia	51.900 €	2,0%	49.960 €	2,0%	49.600 €	2,0%	50.200 €	2,0%	50.800 €	2,0%	56.000 €	2,0%
Manutenção	17.143 €	0,7%	31.429 €	1,3%	62.857 €	2,5%	62.857 €	2,5%	62.857 €	2,5%	62.857 €	2,2%
Total Custos Não Distribuíveis	1.034.043 €	39,8%	980.439 €	39,2%	961.507 €	38,8%	973.888 €	38,8%	983.657 €	38,7%	1.058.857 €	37,8%
Gross Operating Profit	1.024.707 €	39,5%	934.861 €	37,4%	880.993 €	35,5%	908.612 €	36,2%	928.843 €	36,6%	1.104.643 €	39,5%
Custos Fixos												
Seguros	30.000 €	1,2%	30.000 €	1,2%	30.000 €	1,2%	30.000 €	1,2%	30.000 €	1,2%	30.000 €	1,1%
Reserva para Re-investimento	42.857 €	1,7%	78.571 €	3,1%	157.143 €	6,3%	157.143 €	6,3%	157.143 €	6,2%	157.143 €	5,6%
Gestão Profissionalizada - Visitor Attraction	159.827 €	6,2%	149.729 €	6,0%	144.879 €	5,8%	147.989 €	5,9%	150.507 €	5,9%	172.371 €	6,2%
Fixo	*77.850 €*		*74.940 €*		*74.400 €*		*75.300 €*		*76.200 €*		*84.000 €*	
Variável	*81.977 €*		*74.789 €*		*70.479 €*		*72.689 €*		*74.307 €*		*88.371 €*	
Total Custos Fixos	232.684 €	9,0%	258.300 €	10,3%	332.022 €	13,4%	335.132 €	13,4%	337.650 €	13,3%	359.514 €	12,8%
EBITDA	792.023 €	30,5%	676.561 €	27,1%	[illegible]	22,1%	573.480 €	22,8%	591.193 €	23,3%	745.129 €	26,6%

Sorry!

Summer Lab
August 2012
Simon Punter

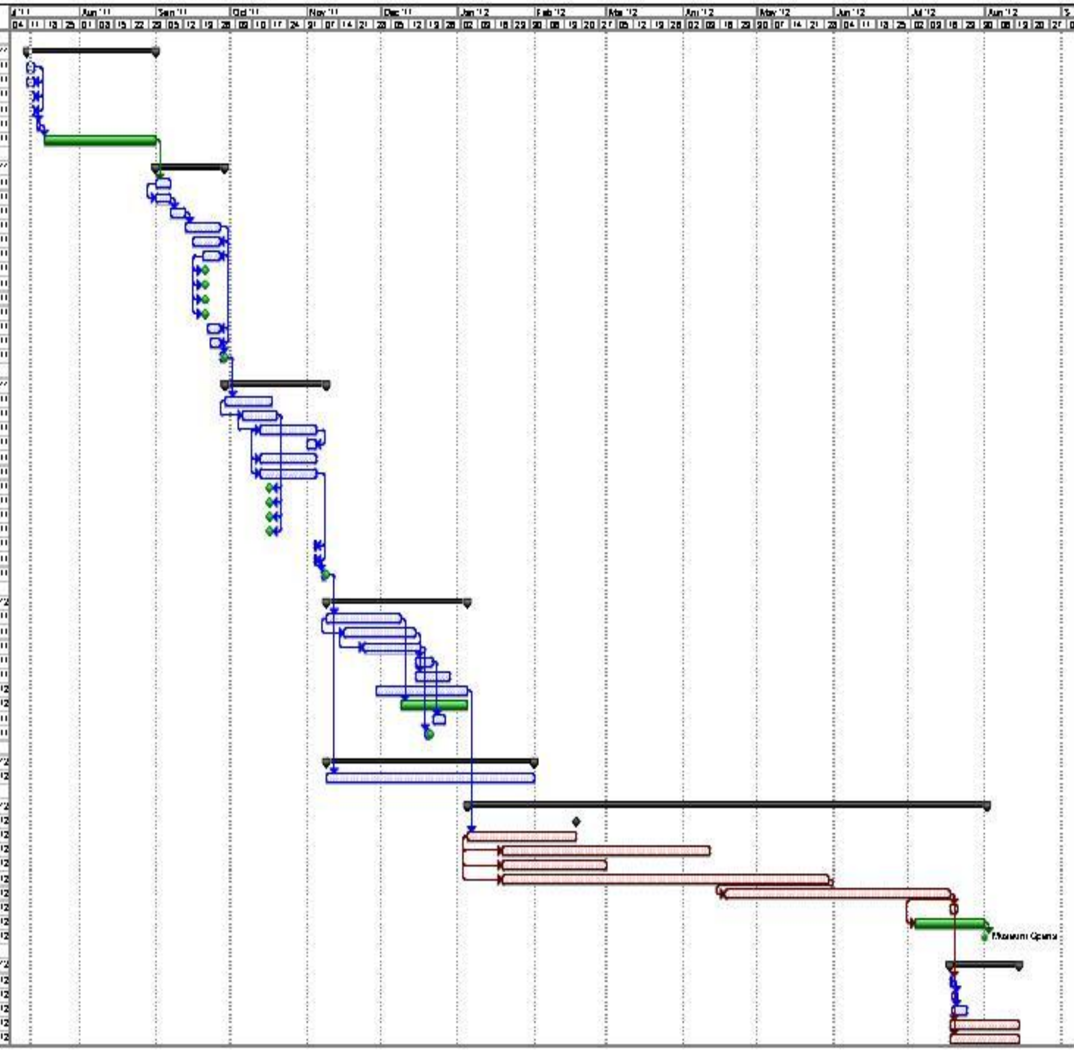
GROUP ILM

Lisbon Story Centre (Terreiro do Paço)

Outline Programme

11 July 2011

ID		Task Name	Duration	Start	Finish
1					
2		Feasibility, Brief Development and Evaluation	38 days	Mon 11/07/11	Wed 31/08/11
3		Preliminary Feasibility	3 days	Mon 11/07/11	Wed 13/07/11
4		Outline Plans, layouts and routing diagrams	3 days	Mon 11/07/11	Wed 13/07/11
5		Budget Cost Plan	2 days	Tue 12/07/11	Wed 13/07/11
6		Outline Programme	2 days	Tue 12/07/11	Wed 13/07/11
7		Presentation to Client	1 day	Fri 15/07/11	Fri 15/07/11
8		Client discussion re. finance and preparation	33 days	Mon 18/07/11	Wed 31/08/11
9					
10		Phase 1 - Master Planning & Concept Development	20 days	Thu 01/09/11	Wed 28/09/11
11		Detailed Interpretive Plan	4 days	Thu 01/09/11	Tue 06/09/11
12		Detailed Design Brief	4 days	Thu 01/09/11	Tue 06/09/11
13		Conceptual design response	4 days	Wed 07/09/11	Mon 12/09/11
14		Schematic General Arrangement plan(s)	10 days	Tue 13/09/11	Mon 26/09/11
15		Concept sketches, mood boards and visuals	7 days	Fri 16/09/11	Mon 26/09/11
16		Graphic styling	5 days	Tue 20/09/11	Mon 26/09/11
17		Determine image research	1 day	Wed 21/09/11	Wed 21/09/11
18		Initial Object Reference sheets	1 day	Wed 21/09/11	Wed 21/09/11
19		Initial Exhibit Media Reference sheets	1 day	Wed 21/09/11	Wed 21/09/11
20		Initial Image Reference sheets	1 day	Wed 21/09/11	Wed 21/09/11
21		Budget allocation	3 days	Thu 22/09/11	Mon 26/09/11
22		Outline programme	2 days	Fri 23/09/11	Mon 26/09/11
23		Presentation and Client sign off	2 days	Tue 27/09/11	Wed 28/09/11
24					
25		Phase 2 - Design Development	28 days	Thu 29/09/11	Tue 08/11/11
26		Design development drawings, sketches, visuals, etc.	13 days	Thu 29/09/11	Mon 17/10/11
27		Detailed General Arrangement plan(s)	10 days	Thu 06/10/11	Wed 19/10/11
28		Outline exhibit specifications and schedules	17 days	Thu 13/10/11	Fri 04/11/11
29		Initial graphics schedule	4 days	Tue 01/11/11	Fri 04/11/11
30		AV & IT Storyboards	17 days	Thu 13/10/11	Fri 04/11/11
31		Prototypes	17 days	Thu 13/10/11	Fri 04/11/11
32		Completed Object Reference sheets	1 day	Mon 17/10/11	Mon 17/10/11
33		Completed Exhibit Media Reference sheets	1 day	Mon 17/10/11	Mon 17/10/11
34		Completed Image Reference sheets	1 day	Mon 17/10/11	Mon 17/10/11
35		Finalised text and lo-res images	1 day	Mon 17/10/11	Mon 17/10/11
36		Budget review and update	1 day	Fri 04/11/11	Fri 04/11/11
37		Update Outline implementation programme	1 day	Fri 04/11/11	Fri 04/11/11
38		Presentation and Client sign off	2 days	Mon 07/11/11	Tue 08/11/11
39					
40		Phase 3 - Detailed Design Intent, Specification & Procurement	41 days	Wed 09/11/11	Wed 04/01/12
41		Detailed design intent drawings	22 days	Wed 09/11/11	Thu 08/12/11
42		Detailed exhibit specifications and schedules	21 days	Wed 16/11/11	Wed 14/12/11
43		Display case layouts	17 days	Thu 24/11/11	Fri 16/12/11
44		Detailed graphics schedule	5 days	Thu 15/12/11	Wed 21/12/11
45		Detailed graphics styling and production guidelines.	10 days	Thu 15/12/11	Wed 28/12/11
46		Specialist Sub-contract document packages	27 days	Tue 29/11/11	Wed 04/01/12
47		Hi-res images inc. Copyright	19 days	Fri 09/12/11	Wed 04/01/12
48		Phased manufacture and installation programme / schedule	3 days	Thu 22/12/11	Mon 26/12/11
49		Presentation and Client sign off	2 days	Mon 19/12/11	Tue 20/12/11
50					
51		Phase 4 - MSD D&B Sub-Contractor Negotiations	60 days	Wed 09/11/11	Tue 31/01/12
52		MSD D&B Sub-Contractor Negotiations	60 days	Wed 09/11/11	Tue 31/01/12
53					
54		Phase 5 - Contract, Manufacture & Installation Coordination - Commissioning	150 days	Thu 05/01/12	Wed 01/08/12
55		Handover of finished building - secure & conditioned	1 day	Fri 17/02/12	Fri 17/02/12
56		Construction/shop drawings	32 days	Thu 05/01/12	Fri 17/02/12
57		Production Artwork	60 days	Thu 19/01/12	Wed 11/04/12
58		Samples and prototypes	30 days	Thu 19/01/12	Wed 29/02/12
59		Off-site manufacture	94 days	Thu 19/01/12	Tue 29/05/12
60		On-site fabrication	65 days	Wed 18/04/12	Tue 17/07/12
61		Payment certification	3 days	Wed 18/07/12	Fri 20/07/12
62		Object installation	20 days	Wed 04/07/12	Tue 31/07/12
63		Museum Opens	1 day	Wed 01/08/12	Wed 01/08/12
64					
65		Phase 6 - Post-Contract Monitoring & Practical Completion	20 days	Wed 18/07/12	Tue 14/08/12
66		Practical completion certification	1 day	Wed 18/07/12	Wed 18/07/12
67		Payment certification	2 days	Thu 19/07/12	Fri 20/07/12
68		Final Account	4 days	Thu 19/07/12	Tue 24/07/12
69		As-built drawings and maintenance manuals	20 days	Wed 18/07/12	Tue 14/08/12
70		Post-handover defects monitoring procedures	20 days	Wed 18/07/12	Tue 14/08/12



Summer Lab

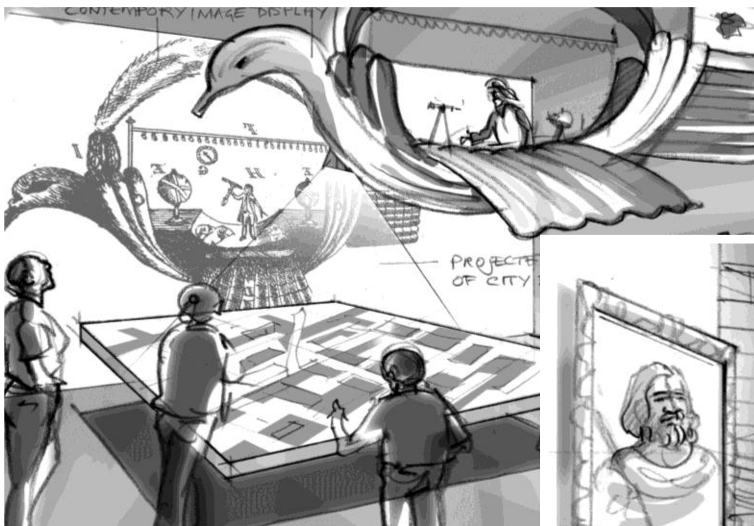
August 2012

Simon Punter

LABORATÓRIO DE TURISMO CULTURAL

(Culture Tourism Lab)

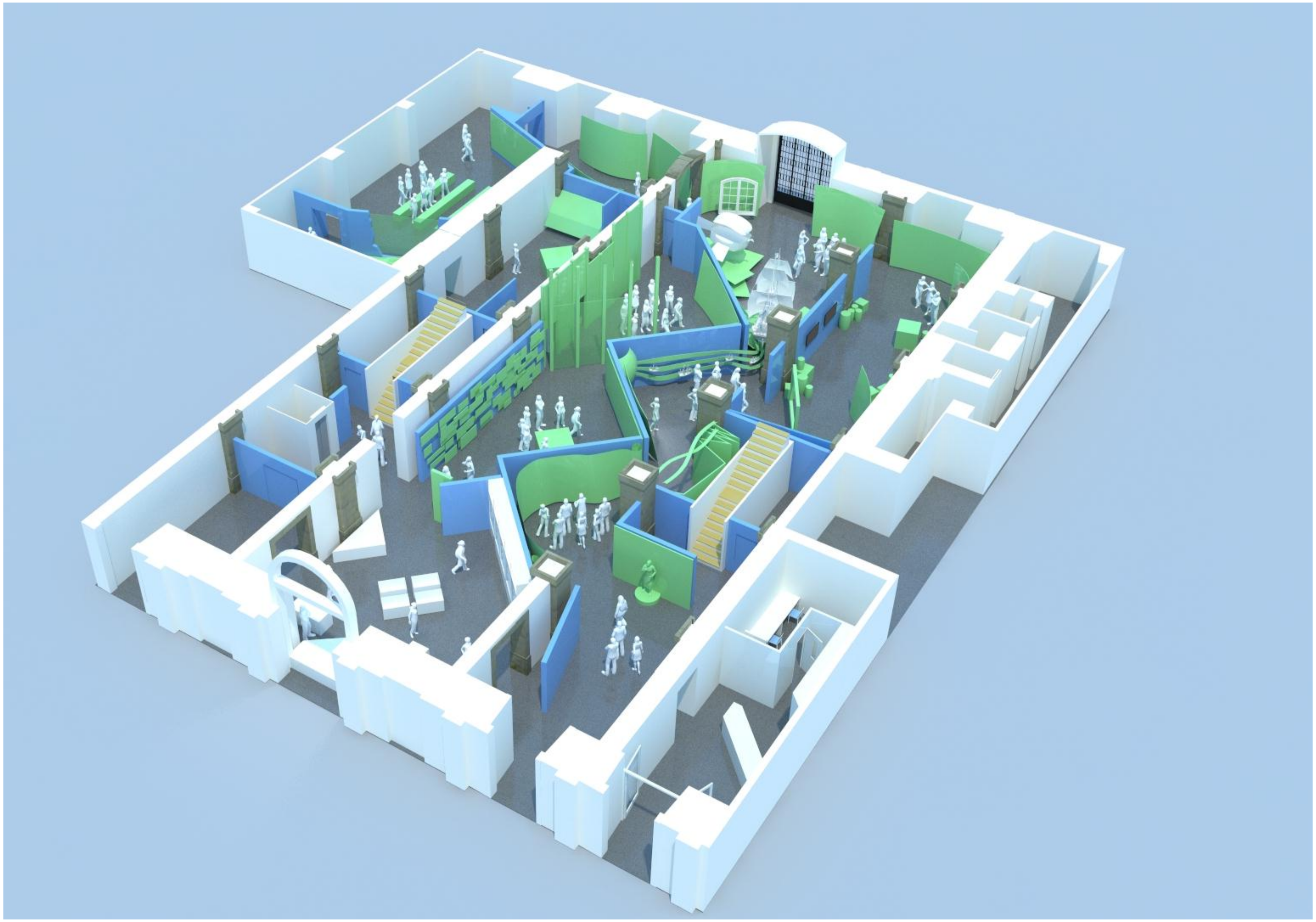
by ILM Group



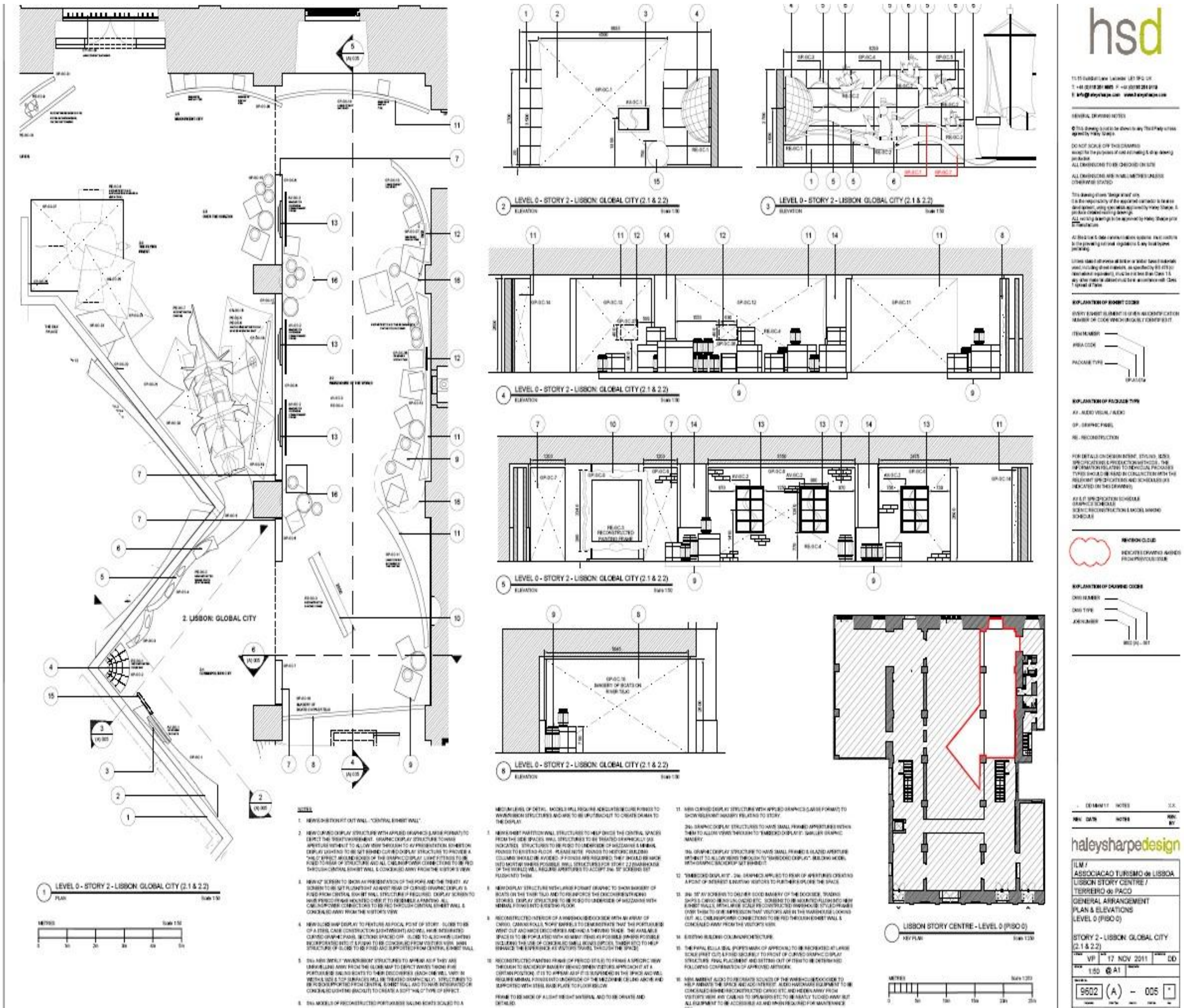
GROUP ILM

LEADING SUSTAINABLE TOURISm²

General Arrangement Plan – Level 0 (Piso 0)
Model Exploration



CONSULTAL
www.consultal.pt



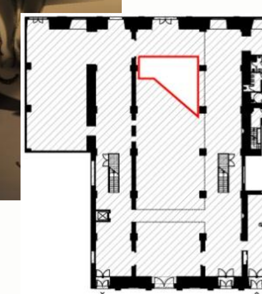
Summer Lab

August 2012

Simon Punter

GROUP ILM

CONSULTAL
www.consultal.pt



Summer Lab

August 2012

Simon Punter

GROUP ILM

haleysharpedesign

CONSULTAL
www.consultal.pt

A Case Study

Summer Lab
August 2012
Simon Punter

GROUP ILM

Summer Lab

August 2012

Simon Punter

CONSULTAL
www.consultal.pt

A Case Study

Summer Lab

August 2012

Simon Punter

GROUP ILM

CONSULTAL
www.consultal.pt

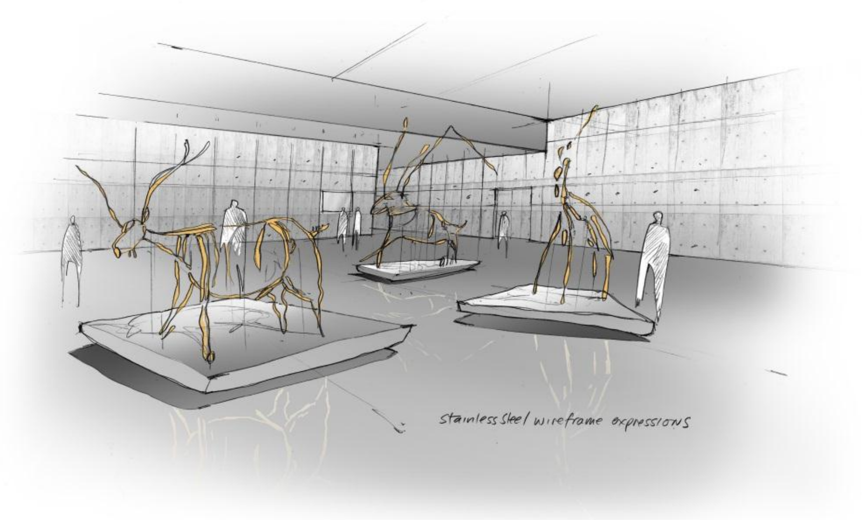
Summer Lab

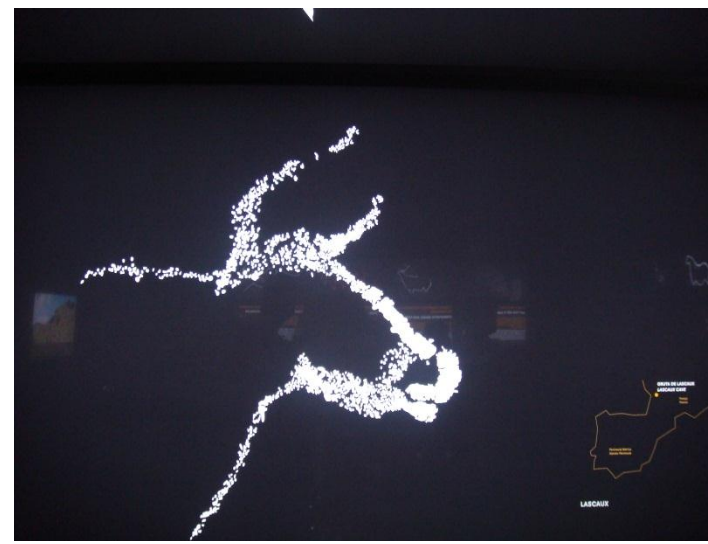
August 2012

Simon Punter

GROUP ILM

CONSULTAL
www.consultal.pt





Summer Lab

August 2012

Simon Punter

GROUP

CONCLUSIONS

Bridging the Gap

Working the Tourism / Cultural Symbiosis

- **Current window of opportunity**
- **An holistic integrated approach**
- **Need a long-term stress balance**
- **Use it to grow the home market**
- **The product is experience itself**
- **Engage, stimulate, interact; *reap*.**

Thank You

Where to find us

CONSULTAL

Largo Rafael Bordalo Pinheiro, 16

1200- 369 Lisboa

Office: (+351) 213 245 029

Cell: (+351) 966 898 670

spunter@consultal.pt