

BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

THE FUTURE OF FOREDOWN TOWER AS A VISITOR ATTRACTION

REPORT FOR BRIGHTON & HOVE CITY COUNCIL

AUGUST 2008

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ABOUT THIS REPORT

Before consulting more widely on the future of Foredown Tower, Brighton & Hove City Council asked destination analysts Blue Sail for their professional judgement on the Tower's performance and potential as a visitor attraction.

We visited the Tower, collected data, reviewed documents, met with council officers, and spoke to external agencies to explore ideas for the future.

This report summarises our findings and recommendations.

We have kept this report as concise as possible - so that our recommendations are clear and unambiguous.

There is more information in the appendices.

1 OVERVIEW AND CONCLUSIONS

- ▶ Foredown Tower is a characterful historic building and attractive landmark on the edge of the city.
- ▶ Its main attractions are its location on the edge of the Downs and proposed National Park, the spectacular 360 degree views from its top floor, and the opportunity to experience a Camera Obscura.
- ▶ Visitor numbers to the Tower have fallen in recent years - in common with most small paid-for attractions, as competition for people's leisure spend and time has grown.
- ▶ The educational visits market is increasingly competitive too, and schools' visits to the Tower and adjacent Wildlife Site have almost completely dried up.

- ▶ The Tower is available for education and groups visits all year round. But public opening hours have been reduced over the last few years - in response to very low visitor numbers on certain days and at certain times of the year, and the need for efficiency savings. Of course, this in turn reduced the overall annual visitor numbers. .
- ▶ The Tower's 'offer' has not kept pace with changing customer expectations and is not clearly or strongly defined. Its themes are 'downland, weather and astronomy'. But it isn't strong in any of these areas, and it doesn't offer a coherent 'joined-up' experience for visitors.
- ▶ The Camera Obscura is rare, but has limited appeal in this hi-tech age. It doesn't fit particularly well with the Tower's other themes, or with its magnificent views (which have to be blocked out while the Camera is being demonstrated). And it is entirely weather-dependent, so it is often not available, despite being presented as the main attraction.
- ▶ The Wildlife Site - which has no interpretation or aspects of special interest - does not have much appeal to the schools for whom it is intended. It doesn't have clear thematic links with the Tower either.

- ▶ To increase leisure visits to the Tower would require significant funds - both to improve the visitor experience and to increase marketing spend.
- ▶ Also the building is nearly 100 years old and now needs substantial money to maintain its fabric. As a public attraction and community facility, it also needs money to be spent to comply with the DDA (Disability Discrimination Act).
- ▶ So - to continue as a visitor attraction - it would need substantial increases in both capital and revenue funding, at a time when local authority budgets are under severe pressure.

- ▶ But the size and setting of the building will always limit the scale and nature of its operation as a visitor attraction, and its income-generating potential. (Capacity at any one time is 60 for the Tower, including 20 maximum for the Camera Obscura.)
- ▶ So, even with improved product and marketing, the Tower will remain a 'niche' attraction in a city (and area) with a wealth of competing attractions.

- ▶ For all these reasons, we believe the Tower's principal use should no longer be as a visitor attraction: and that Brighton & Hove City Council (BHCC) should explore other uses.
- ▶ We recommend that the Tower's main focus should shift to becoming a community facility for Brighton & Hove residents to access the countryside, and that BHCC should explore the potential for transferring the Tower's operation to a Community Trust.
- ▶ BHCC's commitment would be essential - to manage the process of change and to be an active partner in the new Trust.
- ▶ This new focus would mean the Tower could attract external funding, and would be in a better position to take advantage of any opportunities that arise from the expected National Park designation.

2 FOREDOWN TOWER TODAY

Foredown Tower is a characterful historic building and landmark on the edge of Brighton & Hove. Its main attractions are its location on the edge of the Downs, the spectacular 360 degree views from its top floor, and the opportunity to experience a Camera Obscura - one of only two in the region.

VISITOR NUMBERS

But very few people visit the Tower:

Independent visits	<ul style="list-style-type: none"> ▶ There were 1570 paid visits to the Tower in the financial year 2007/08. ▶ There is no recent formal visitor research, but the majority of visitors are thought to be local residents. ▶ Total paid visits have been relatively stable over the last 3 years. ▶ Non-paying visits are <i>estimated</i> at between 1,000 and 2,000 a year - these are mainly local walkers using the Tower as a 'pit stop' for toilets, drinks and ice creams.
Schools visits	<ul style="list-style-type: none"> ▶ Numbers are reducing ▶ There were 27 schools visits in the 3 years to 07/08, from a total of 19 different schools. ▶ More than half of these visits were from either Special Needs Schools or independent schools - both of which have smaller class sizes, so can use a mini bus (there is no room for full-size coaches at the Tower), and they have greater flexibility to make visits that are not linked to the National Curriculum. ▶ There have been no visits to the Wildlife Site in 2008.
Earlier opening hours and visitor numbers	<ul style="list-style-type: none"> ▶ In the 1990s, Foredown Tower was open 7 days a week, almost all year round. ▶ We understand that there were around 6,000 paid visits in the first year of the unitary authority (1997/98). ▶ Official figures before that are not available, but are said to have been 10,000+ in the early 90s - made up of independent visitors, school groups and community users.
Current opening hours	<ul style="list-style-type: none"> ▶ The Tower is still open year-round for pre-booked schools and group visits if required (although demand is minimal). ▶ It is now open to the public for approx 90 days a year i.e. 10am to 5pm weekends and Bank Holidays, mid February to the end of October, and Thursdays-Sundays plus Bank Holidays in August.

See appendix 1 for more data about the Foredown Tower today.

CONTEXT

Key factors influencing the Tower’s performance are:

CHANGES	IMPLICATIONS
Increased competition in last decade	<ul style="list-style-type: none"> ▶ Growth in shopping, eating out and home entertainment as leisure activities. ▶ New lottery-funded attractions, and free-entry to national museums. ▶ Investment in competing attractions in the city and region ▶ Greatly improved city centre & seafront offer. ▶ Increasing need for strong branding & marketing to achieve ‘cut through’ in a crowded marketplace.
Growth of consumerism	<ul style="list-style-type: none"> ▶ More ‘experienced’, ‘sophisticated’ consumers. ▶ Higher quality expectations - including catering and retail. ▶ Consumers look for interactive experiences, rather than ‘stand and listen’. ▶ Camera Obscura has less appeal than to previous ‘low-tech’ generations. ▶ Importance of differentiated, segmented marketing. ▶ Importance of word of mouth recommendations. ▶ Need to invest in digital marketing - technology and skills. ▶ Need high-quality, unique experiences to attract today’s consumers - especially where there is little passing trade.
Changes in schools market	<ul style="list-style-type: none"> ▶ More red-tape, especially health & safety - risk assessments needed at trip planning stage. ▶ Visits are no longer in schools’ core budget - so fewer trips, and families usually have to pay. ▶ Tighter focus on curriculum-related activities. ▶ Higher expectations - targeted, specialist approach and facilities required.
Organisational changes	<ul style="list-style-type: none"> ▶ Change in 1997 from Borough Council to Unitary Authority - with huge statutory obligations and budget challenges. ▶ Foredown became part of a larger Museums portfolio with high demand on budgets for all its activities, including on its marketing budgets which are lower than the industry norm for visitor attractions. Judged on return on investment, it has been impossible for FT to justify a larger share of the portfolio’s very limited marketing budget.

See appendix 2 for an overview of visitor attraction market trends.

OFFER, FACILITIES, MARKETING, RESOURCES

Analysing the Tower's current offer, facilities, marketing and resources by the four main markets / user groups reveals significant challenges:

	INDEPENDENT VISITORS	SCHOOLS	ASTRONOMERS	COMMUNITY FACILITY USE
Offer	<ul style="list-style-type: none"> ▶ Camera Obscura ▶ 360 degree view ▶ Iconic building ▶ Countryside interpretation - map and leaflets ▶ 'Pit Stop' for walkers ▶ No clear USP ▶ Mixed messages about its focus 	<ul style="list-style-type: none"> ▶ Camera Obscura ▶ Wildlife Site ▶ Science & nature ▶ Not tied to curriculum ▶ Very little 'hands on' / interactive ▶ Highly weather dependent 	<ul style="list-style-type: none"> ▶ Astronomy course ▶ FT Manager leads Group ▶ Meetings 6 x p.a. - but difficulties getting speakers 	<ul style="list-style-type: none"> ▶ Meeting/event space ▶ Interesting building ▶ Unkempt but attractive walled garden space ▶ Access to Downs
Facilities	<ul style="list-style-type: none"> ▶ Dated displays & interpretation ▶ No catering ▶ Narrow retail offer ▶ Poor access – inaccessible to physically disabled ▶ Feels out of step with modern City 'brand' 	<ul style="list-style-type: none"> ▶ Lack of cloaks, loos, coach parking ▶ Lack of retail offer ▶ Classroom too small for mainstream class sizes ▶ Wildlife site – difficult access, uninterpreted, H&S risks 	<ul style="list-style-type: none"> ▶ Meeting space ▶ Storage space for equipment / library ▶ No formal catering ▶ Limited car parking ▶ Outside space used for 'star gazing' 	<ul style="list-style-type: none"> ▶ Poor access to 1st & 2nd floors ▶ No catering ▶ Sparsely equipped ▶ External staircase ▶ Dark unlit access road ▶ Cold in winter ▶ No private storage space

Marketing	<ul style="list-style-type: none"> ▶ Integrated into Museums Service marketing (whole portfolio has a very small budget) ▶ Delivered by professional, experienced marketers ▶ No dedicated marketing or segmentation - FT has sections in portfolio print and on website ▶ PR for Events ▶ Local brown tourism signs ▶ No visitor surveys/research 	<ul style="list-style-type: none"> ▶ Handled by Museums Education team as part of the wider portfolio ▶ Direct sales, newsletters etc ▶ No systemic customer evaluation 	<ul style="list-style-type: none"> ▶ By the Group and on the FT section of the website 	<ul style="list-style-type: none"> ▶ Currently ad hoc ▶ Connections derived from management links
Competition	<ul style="list-style-type: none"> ▶ Significant – city & rural heritage. Many higher profile attractions in the city, and countryside sites in the surrounding area, are better resourced, with a much clearer visitor offer 	<ul style="list-style-type: none"> ▶ Other Brighton Museums, Sussex Wildlife Trust Centre at Henfield, Fishbourne Roman Palace, Weald and Downland Museum, Amberley Museum, Chichester Planetarium, Herstmonceux Astronomy Centre – better resourced, with clear visitor offer and curriculum fit 	<ul style="list-style-type: none"> ▶ Other community locations ▶ University ▶ Other Astronomy Societies - for speakers / members 	<ul style="list-style-type: none"> ▶ Community facilities in Hove, Portslade & Mile Oak
People	<ul style="list-style-type: none"> ▶ At capacity ▶ No succession policy ▶ Only 1 active volunteer ▶ Distant from central service ▶ Impacted by uncertainty over future 	<ul style="list-style-type: none"> ▶ Specialist Museums Education staff, centrally located, travel to FT when needed ▶ Under-resourced on-site management 	<ul style="list-style-type: none"> ▶ Most Group Members are attenders, rather than actively running the Group ▶ Group depends on FT Manager – set up not sustainable long term 	<ul style="list-style-type: none"> ▶ Capacity issues ▶ Staff manage bookings ▶ Not self-contained so needs in-house staffing/cleaners ▶ Depends on volunteers

3 WHERE NEXT?

There are four broad strategic options, illustrated below. This is known as Ansoff's Matrix.

	EXISTING PRODUCT	NEW PRODUCT
EXISTING MARKET	Market penetration Increase sales to existing markets	Product development New product development for existing markets
NEW MARKET	Market development Existing product(s) sold to new markets	Diversification New product(s) sold in new markets

The strategic options of Market Penetration, Market Development and Product Development are all problematic for the Foredown Tower:

MARKET PENETRATION Increase sales to existing markets	<ul style="list-style-type: none"> ▶ Of the four current markets and user groups - independent visitors, schools, astronomers and other community users - poor product fit and/or fierce competition mean only the independent visitor market offers any potential for market penetration. ▶ Even so, there is very strong competition for independent visitor spend in the vicinity. ▶ A significant increase in marketing spend and staff time could bring in new (or lapsed visitors) for a one-off visit. But the current poor visitor experience is unlikely to meet expectations, encourage repeat visits or result in recommendations. Indeed, it could result in negative word of mouth, which could cancel out the impact of the increased marketing spend. ▶ So we would not recommend a strategy of Market Penetration, even for this market.
MARKET DEVELOPMENT Existing product(s) sold to new markets	<ul style="list-style-type: none"> ▶ There may be some untapped niche markets - eg photography and arts students - but these are very small and require new specialist marketing for small returns. ▶ In any case, product development would be needed. New markets would expect: Quality; Accessibility; Value for money and time; Relevance to their interests; Innovation; and that the Basics are right - toilets, customer service etc. ▶ So Market Development is not an option without Product Development (see over).

PRODUCT DEVELOPMENT

New product development for existing markets

- ▶ Existing product has exceeded its sell-by date.
- ▶ Current interpretation is dated compared with the new technology of other attractions.
- ▶ Lack of basic infrastructure - especially catering, which is now a main driver for leisure outings.
- ▶ Wildlife Site has no current market - significant product development essential if visitor markets sought.
- ▶ Independent visitors are the only market with some growth potential.
- ▶ But the property has real capacity constraints and bottle-necks which limit market growth from independent visitors.
- ▶ So it is difficult to justify the scale of investment for this segment.
- ▶ Significant capital is needed to make the property attractive and accessible to visitors.
- ▶ So we would not recommend Product Development.

CONCLUSIONS

So Market Penetration, Market Development or Product Development are not options for the Tower as a visitor attraction, without significant capital and revenue investment.

But that doesn't mean that it should close.

The Tower has a number of key assets that suggest an alternative use: the building and community/political backing for its retention as a public building, the Downs location, links to the Wildlife Site and countryside, and its position at the entrance to the proposed National Park.

Nor should its current assets and uses be lost. Some may need to be found other locations (for example, the Camera Obscura), while existing community users and groups could benefit from improved facilities in a refocused Tower.

DIVERSIFICATION
New product(s) sold in new markets

We believe the main focus of the Tower needs to change, so diversification is our recommended Strategic Option - see Section 4.

4 OUR RECOMMENDED OPTION

We recommend that BHCC focuses on a new direction for the Foredown Tower - a community facility for Brighton & Hove residents to access the countryside - summarised below.

OUTLINE	<ul style="list-style-type: none"> ▶ Mixed-use community facility incorporating meeting and event space and equipment storage for community groups, and facilities and equipment for access onto the South Downs (with a focus on excluded groups). ▶ Scope for increasing allotment space and developing a community farm to operate alongside the Tower with some shared facilities and client groups. ▶ Improved 'pit stop', information and facilities for independent walkers and cyclists. ▶ Community management of the facility would be encouraged and the opportunity to pass the building into Community Ownership would be explored.
BENEFITS	<ul style="list-style-type: none"> ▶ Good working base for community groups. ▶ Established and equipped access point into the Downs for excluded groups – walking, cycling, riding etc. ▶ Build stronger community links with the Tower. ▶ Develop and empower community management and ownership. ▶ More positive use of wildlife site land. ▶ Community engagement with producing own food. ▶ City-wide community farm resource for disabled groups. ▶ Improved facilities for current community users and groups, and for independent walkers and cyclists.
STRATEGIC FIT	<ul style="list-style-type: none"> ▶ For BHCC this is an opportunity to turn what is currently a drain on resources with no obvious way of increasing visitor numbers and revenue without significant investment over a number of years into a useful and viable asset managed by the community. The building would remain open to the public and part of the landscape but with higher levels of use and stronger links to the surrounding countryside and local community than at present. ▶ The Council has, through its 'Downland Initiative', strategic objectives to support and encourage greater access to the Downs for excluded groups within the City. Natural England, delivering DEFRA's strategic objectives outlined in the report 'Outdoors for All' are

also engaged in encouraging countryside access for these groups. This feeds down into programmes delivered by the South Downs Joint Committee (and any future national park authority).

- ▶ Wider access to the countryside for a wide range of people not currently active is also a growing part of the health agenda, with investment in 'Health Walks' programmes and access initiatives to assist in recovery from mental health problems.
- ▶ The Government has introduced a number of policies aimed at empowering local communities and made them the central aim of the recent Local Government White Paper. This includes actions to enable Councils to more easily transfer the ownership of Council-owned assets to Community Groups, the development of Community Land Trusts and encouragement for social enterprises or Community Interest Companies to manage and deliver local services.
- ▶ There is increasing public interest in sourcing local produce with a reliable provenance and in growing their own food. This is illustrated in the rise in demand for allotments and growth of community-led farms.

FUNDING

- ▶ Adopting a multi-use approach to Foredown Tower and its surrounding land would create the opportunity to:
 - develop a range of income streams from services using the Tower and Wildlife site's facilities and services
 - bid for grant funding designed to support access and community farm projects.
- ▶ Big Lottery funds have recently been allocated to 'Changing Spaces', a national environmental programme focusing on three priority areas – community spaces, local community enterprise and access to the natural environment. It will invest around £200 million in environmental projects across England in partnership with other organisations including Groundwork, Natural England, the Association of Wildlife Trusts and Mind who are managing the programmes.

MORE INFO

- ▶ We provide more detail in Appendix 3 - Option Appraisal.

5 MOVING FORWARD

TIMELINE

Our suggested timeline for this project is:

September 2008 to Spring 2009

Discuss with community and potential partners – scope scale and shape of development; set up working party; produce fully costed business plan.

By Autumn 2009

Submit bids to funding agencies, secure partner funds in 2010/11 budgets.

By Spring 2010

Start work on site.

PEOPLE RESOURCE

There are two distinct phases that will require adequate people time if this project is to succeed:

The Development Phase - consultation, planning and delivery of the project, primarily from internal BHCC resources and a stakeholder working group.

The Management Phase - the running and managed growth of the facility, primarily from community and third sector resources.

IMMEDIATE NEXT STEPS

- ▶ Establish political and senior officer commitment.
- ▶ If positive, open discussions with potential partner agencies, client and service groups and the local community to gauge market opportunities and willingness to work on new option.
- ▶ Scope opportunities for grant funding and produce outline bid for review.
- ▶ Discuss ideas with planners.
- ▶ Enter discussions with businesses re potential sponsorship or CSR involvement.
- ▶ Set up Working Group made up of interested parties and community stakeholders to develop a fully costed business plan.
- ▶ Identify lead Officer(s) within the Council to support the Working Group, to lead discussions with partner agencies, and to produce bid(s) for funding.

APPENDICES

Appendix 1: Blue Sail Visitor Attraction Audit

Appendix 2: Visitor Attraction Market Trends

Appendix 3: Blue Sail Option Appraisal

Disclaimer: All information and analysis supplied by Blue Sail Consulting Ltd and our sub-contractors is done so in good faith and represents our professional judgement based on the information obtained from the client and elsewhere. The achievement of recommendations, forecasts and valuations depend on factors beyond our control. Any projections, financial or otherwise, in this report are only intended to illustrate particular points of argument and do not constitute forecasts of actual performance