Final report:
Visitor Planning and Recreation Development for Seven Lochs Wetland Park

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Executive Summary

The Seven Lochs Wetland Park will contribute towards the restoration of existing lochs and wetlands, and to the creation of new wetlands and woodlands for climate change adaptation, amenity, and the improvement of the environmental quality of the area.

Most importantly, the Wetland Park will act as a catalyst for economic and social regeneration through the development of a comprehensive recreational offer that will provide enhanced, improved and new facilities, amenities and services to both visitors and local communities.

At present, the various areas to be integrated within the wider Park are extremely diverse in terms of profile, amenities and activities available, and popularity. The Wetland Park aims to build on the strengths of individual areas by reinforcing their local identity and purpose whilst also linking key sites and features both physically, through an extensive network of paths and routes across the park, and mentally, through improved interpretation and community engagement. It will create a sense of place, emphasising the importance of the wetlands ecosystem as well as local history and culture.

Five key gateways have been identified:

- Drumpellier Country Park which attracts already over one million visits a year, but with facilities that merit re-investment to match 21st century visitors' expectations. Provision of original, stimulating and innovative activities aimed at children, the grand-travel and experience markets will attract new visitors and increase repeat visits.
- Provan Hall and Auchinlea Park will become a significant new gateway to the Wetland Park; engaging with visitors interested in the history and heritage of Provan Hall, Easterhouse residents as well as shoppers to Glasgow Fort. The new visitor centre will focus on interpreting one of the oldest buildings in Glasgow, and introducing visitors to the wider Wetland Park. A café/bistro, lecture space and meeting rooms will provide much needed space for community and local uses.
- Hogganfield Park and Local Nature Reserve is already a well-used local amenity, but merits investment in facilities to create a stronger sense of welcome to the Wetland Park, offering visitor information, quality catering and spectacular wildlife viewing opportunities.
- Bishops Loch should enhance its character as a Local Nature Reserve, providing a positive environment for nature, offering opportunitiesfor wildlife lovers to experience peace and quiet, and supporting increased educational use . Visitor amenities should aim to accommodate a range of uses and users, reflecting the ethos of the Wetland Park.
- Garnqueen Loch and Glenboig Village Park should continue to develop, with developments, including a new Life Centre focusing on wellbeing for local communities., led by the very active Glenboig Neighbourhood House group.,

There is no doubt that the Wetland Park, with appropriate investment in developing infrastructure, recreational (and business) opportunities and sense of place, can become a major new outdoors destination in Scotland's Central Belt.

The Wetland Park will enable visitors to find and participate in outdoors activities to suit their likes and personality, from solitary bird watching at Bishops Loch to fun family days out to more active 'adrenaline' activities. A comprehensive network of paths and cycle routes will link the seven lochs, and promote access for walkers, cyclists and horseriders.

Increased provision of recreational opportunities, and a diverse programme of events and activities, ranging from the passive to the challengingly adventurous, will ensure the Park continues to attract the local market, currently its main market base, while also raising awareness of the area and attracting visitors from across central Scotland. .

The Wetland Park must ensure a high quality of activities, services and amenities, including sense of welcome, information and interpretation, catering and retail are offered. This will reinforce the Wetland Park as a quality must-see destination, driving repeat visitation, increased use of facilities, amenities, businesses, and acting as an engine for economic and social regeneration.

1. Introduction

1.1. Aims and Objectives

The two key aims of this study are:

1. to review the draft vision and masterplan, baseline information and future opportunities to develop a strategy for visitor and tourism development at Seven Lochs Wetland Park.
2. to provide recommendations on opportunities for tourism business development, their links with the development and ongoing management of the Wetland Park.

Some specific requirements in pursuit of these objectives included:

1. examining visitor facilities and numbers, tourism development, and examples of good practice and innovation at other similar destinations in central Scotland and elsewhere;
2. developing visitor profiles and possible demand estimates for the Wetland Park;
3. undertaking stakeholder consultation to identify the potential to work in partnership with others on visitor and tourism, including the resources they can bring to the project;
4. examining recreation provision and tourism development linked to the proposals made in the Wetland Park vision and masterplan, and other opportunities identified; and
5. making recommendations for a visitor planning and recreation strategy, and identify action to take this forward.

The principle outputs include:

- review of current visitor baseline for sites within the Wetland Park, and of visitor facilities, numbers and management practice at other similar destinations;
- a strategy for recreation provision and tourism for the Seven Lochs Wetland Park; and
- an action plan to support implementation of the strategy.

They will also necessarily exist at varying levels of development as different parts of the Park will require more or less of each. We have considered these elements and their location within the notional geographical clusters set out in the Masterplan, as illustrated below.

2. Study Context

2.1. Background

Destined to become Scotland's largest urban wildlife site, the Seven Lochs Wetland Park is an exciting new Green Network project spanning the Glasgow and North Lanarkshire Council boundary. Bringing together almost 17 sq. km of lochs, parks, nature reserves and woodlands it aims to create a new Wetland Park of national significance, linked to a wider network of greenspaces.

Not only will the Seven Lochs Wetland Park contribute towards the restoration of existing lakes and wetlands, it will also consider the development of new lakes and wetlands for climate change adaptation, and the improvement of the environmental quality of the partner regions.

The Masterplan and vision for the proposed Wetland Park was published in September 2011. Extensive consultation was carried out to ensure boundaries, access and engagement strategies with the local and wider community were appropriate.

"The vision is to create a new wetland park of national significance between Glasgow and North Lanarkshire, and to deliver, manage, and sustain a high quality innovative wetland environment that will protect and enhance the biodiversity of the area as a national resource that promotes the general health and wellbeing of both visitors and residents alike, and contributes to the environmental, economic and social regeneration of the area."[1]

This report is concerned with developing the Seven Lochs Wetland Park as a holistically-planned recreation destination which will:

- cater for the needs of local residents and visitors;
- offer a mix of activities that will contribute towards the environmental, economic and social regeneration of the area.

Indeed, when considering economic performance of Local Authority Wards within or directly adjacent to the proposed Wetlands Park (including, for Glasgow City: Gartcraig, Robroyston, Garthamlock, Easterhouse and for North Lanarkshire: Moodiesburn West & Gartcosh and North Central & Glenboig), NOMIS statistics show that overall, the wards' general labour and employment profiles show higher rates of unemployment (particularly in the 18-24 age bracket).

In the above named wards, the proportion of residents who are considered key out-of-work benefit claimants[2] is higher than the national average, in particular in the Glasgow City Wards of Gartcraig, Garthamlock and Easterhouse.

It is hoped the Wetlands Park will act as a catalyst for regeneration, through the development of activities, whether they concern the environmental management of the area, conservation activities directed towards local built or natural heritage, as well as business activities directed at enhancing the leisure and recreation supply the area has to offer to residents and visitors alike.

[1] Source: The Seven Lochs Wetland Park (2012) *Masterplan and visioning study: report on communication and stakeholder consultation*. Prepared by Collaborative Architecture for Glasgow and Clyde Valley Green Network Partnership /International Resources and Recycling Institute (February 2012).

[2] Key out-of-work benefits includes the groups: job seekers, ESA and incapacity benefits, lone parents and others on income related benefits.

2.2. Recreation Elements

For this summary we have condensed our considerations for recreation and visitor development into four themes; attractions, access, amenities and ancillary services. These have different levels of importance in the decision to visit, but are interdependent when determining the quality of the visitor experience.

Attractions – core and secondary considerations that drive motivation:

- Physical - Natural/Built; lochs, woodlands, canals, wetlands, beaches, architecture, etc.
- Cultural – customs, language, dress, food, events, etc.
- Historic – history, archaeology, industries, historic figures, etc.

Access – allowing visitors an easy way into the Park that maximises leisure time:

- National & local transport
- Transport routes and terminals
- Time
- Ability/Capability

Amenities – features that support visitor enjoyment of the destination:

- Parking, seating, toilets, shelter
- Food & beverage
- Activities and entertainment
- Retailing
- Other services

Ancillary services – bodies that manage the destination's infrastructure, facilities and services:

- Local & national organisations managing
- Volunteers
- Other local & national institutional elements
- Information provision, health and safety, security, marketing

They will also necessarily exist at varying levels of development as different parts of the Park will require more or less of each. We have considered these elements and their location within the notional geographical clusters set out in the Masterplan, as illustrated below.

Figure 2.1: Seven Lochs Wetland Park Clusters and Gateways

Cluster 1 - Hogganfield Park - (Hogganfield visitor facility)
Cluster 2 - Frankfield Loch, Stepps and Cardowan Moss - (Stepps visitor facility, shops and vantage point)
Cluster 3 - Gartloch Pools and Provan Hall - (Provan Hall visitor centre)
Cluster 4 - Bishop Loch - (The Bridge)
Cluster 5 - Drumpellier Country Park - (Drumpellier visitor centre and Crannog cafe)
Cluster 6 - Johnston Loch and Gartcosh - (Gartcosh community centre)
Cluster 7 - Glenboig and Garnqueen Loch - (Glenboig life centre)

2.3. Visitor Development

Visitor development activity will be a combination of managing the recreational elements provision indicated above and visitor engagement activity (target marketing, volunteering, sponsorship activity, community buy-in).

The former will determine the attractiveness of the offer, while engagement activity will determine the effectiveness of communicating that offer.

2.4. Development Considerations

2.4.1 Conservation Designations

The visitor development will also have to consider the nature conservation status of many of the Park's features including:

- SSSI – Bishop Loch
- SSSI – Woodend Loch
- Local Nature Reserve – Hogganfield Loch
- Local Nature Reserve – Bishop Loch
- Local Nature Reserve – Cardowan Moss
- Local Nature Reserve – Commonhead Moss

This will have implications for the type and level of activity that can be undertaken at these key destinations.

2.4.2 Land

Some landscape restrictions such as peat deposits, disused mine workings and potential flood areas must also be considered as activities could either be detrimental to a protected habitat or to the Park users. These are further detailed in the Masterplan and visioning study.

2.4.3 Land Ownership

In addition to statutory protected areas, development of activities has to take into account a number of other factors to ensure activities are developed within the confines of the law, are supported by private land owners and do not put the public at risk.

Whilst much of the land considered for the Wetland Park is under Council ownership, some land remains under private ownership. This means development of activities on private land will necessarily need to engage with land-owners to ensure their active support of the project and co-development of activities.

2.4.4 Anti-Social Behaviour and Vandalism

Currently, some areas within the Wetlands Park are infamous hot spots, where drinking and other unsocial activities take place, deterring potential visits from local visitors looking for a nice family day out or to take their dog for a stroll. Vandalism and fly tipping are also rife. Further detail is included in the Masterplan.

The literature highlights that high visibility of staff and activities and carefully thought-out landscaping will contribute towards a decrease in anti-social behaviour and activities and an increased use by regular visitors.

3. Current Activity

This section establishes a list of existing provision aimed at visitors throughout the Seven Lochs Wetland Park area. This diagnostic is the first step into developing the Wetland Park into a new nationally significant recreation destination.

3.1. Drumpellier Country Park

Drumpellier Country Park is by far the most visited and developed of the sites within the Wetland Park's notional boundary. It receives around one million visitors per year (Visitor Attraction Monitor, Moffat Centre), making it the most obvious conduit for directing visitors into the Wetlands.

Figure 3.1: Drumpellier Country Park Visitor Centre

3.1.1 Current Visitor Facilities, Services and Activities

The primary feature of Drumpellier is its two lochs, though particularly Lochend Loch.

- Lochend Loch
    - Bird watching
    - Visitor centre and café – requires upgrade and likely extension if Wetlands orientation and interpretation is to be sighted here. Quality of café is reasonable but is perhaps not value for money (based on visit experience).
    - Low impact water sports area in front of visitor centre (boating, sphereing in the summer)
    - Two play areas at the eastern and western ends of the loch
    - Angling site at eastern end of the loch
    - Site of historical Crannog feature
- Walking
    - Paths
        - Playing Fields Loop
        - Nature trails in woods to south and east Lochend Loch
    - Ranger walks and activities are provided by NLC Rangers
- Themed gardens
    - Peace garden at south eastern end of Lochend Loch
    - Nursery
- Stretch of Monklands Canal at southern reaches of the Park; although access to this for park visitors is pretty restricted

- Municipal Golf Club
- Events – there are a number of events throughout the year, although only five or six are deemed of major interest
- Playing fields at eastern section of the park near Townhead Community Centre
- Woodend Loch – this loch is an exclusively focussed on wildlife, with no activity on the water or designated walking paths surrounding it.

Figure 3.2: Crannog interpretation at Drumpellier visitor centre

Figure 3.3: Attractive colour-coded orientation

Although Drumpellier Park is the largest and most used facility, none of its features are of particular national interest or renown, so in order for it to have the impact desired of a major 'gateway' site, there will need to be some developments.

It has been indicated for example that parking capacity can be an issue in the summer, whereby some visitors park on the busy Townhead Road because there are no spaces available in the Park. A Wetlands Park that may increase visitor numbers would be an obvious problem.

Figure 3.4: Map of Drumpellier Country Park

3.1.2 Opportunities

- Refurbishment of visitor centre
- Orientation and interpretation development
- Extension of building
- Extension of car parking
- Extension and revamp of café service
- Creation of Crannog café at eastern end of the Lochend Loch
- Cycling (BD)

  - o Cycle hire
  - o Pick-up and drop off facilities
  - o Bike parking facilities
- New low impact water sport facilities
  - o will most likely need to be non-immersive due blue green algae issue

3.2. Provan Hall and Auchinlea Park

Provan Hall is one of the oldest buildings in Glasgow, dating back to the fifteenth century. The property consists of two A-listed historical buildings (Provan Hall House and Blochairn House) and formal gardens. It is owned by The National Trust for Scotland and managed by Glasgow City Council and Provan Hall Heritage Group. Provan Hall receives between 3,300 and 5,000 visitors per annum.

The property sits within Auchinlea Park which is mostly used by local residents to walk their dogs, take their children out to play, or access the Glasgow Fort shopping complex.

3.2.1 Current Visitor Facilities, Services and Activities

Provan Hall is open to visitors during week days, when visitors can benefit from a guided tour of the house by the Caretaker. School visits are also welcomed. Tours are free of charge however contributions towards the Friends of Provan Hall are encouraged.

Auchinlea Park has a pond, which contains a Central Island for wildlife, and is a home to carp and perch fish. A circular path is maintained around the water's edge. There is also a play area suitable for all age groups.

Events are organised by the Friends of Provan Hall once or twice a year whilst there are a variety of events within the park. These include events organised by local groups such as arts projects by the Provan Hall Conservation and Heritage Sub Group. The Countryside Rangers have various events including the Country In the City Days.

3.2.2 Opportunities

Provan Hall is to become a major gateway to the Wetland Park. Much development and planning work has been carried out to conserve Provan Hall and develop a new visitor centre which would act as a major Gateway to the Wetlands Park. The visitor centre will contain the following amenities:

- a new café/bistro
- an exhibition and lecture space interpreting the Wetlands Park
- flexible spaces to ensure multi-functional use wherever possible

As previously mentioned, Provan Hall and Auchinlea Park sit on the outskirts of the Glasgow Fort shopping complex, which attracts an estimated 12 million visits each year, representing a potentially significant source of demand to be exposed to the Wetlands Park as a natural as well as recreational resource.

As we explored development opportunities for Provan Hall, even attracting one in one thousand would equate to 12,000 visitors. However, we were less convinced that the narrow theme of Provan Hall could persuade visitors to visit Provan Hall. Experience of other visitor attractions that are adjacent to large retail centres suggests that there is a very small crossover indeed – probably less than one in one thousand. To some extent, this is unsurprising given that the primary role of the companies who own and manage these centres is to attract and keep shoppers as much as possible at the outlets within the centres. Nonetheless, Glasgow Fort Management are enthusiastic about the Wetlands development and see it potential as complimentary to their offer.

The greater leisure opportunities that the Wetlands would encompass could provide a significant pull for some shoppers.

3.3. Hogganfield Loch

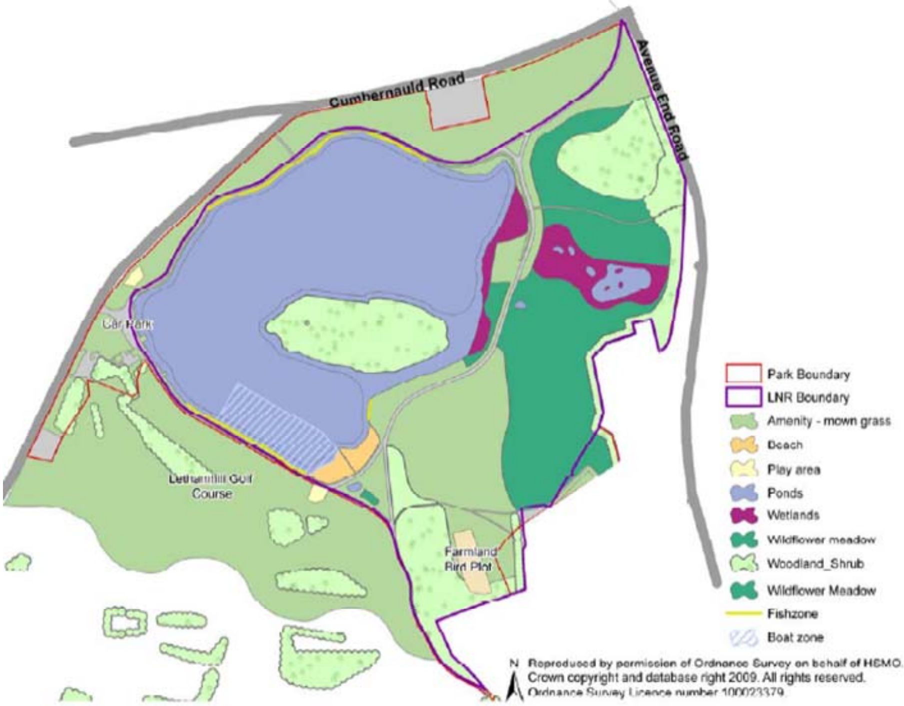
Hogganfield Loch is regarded in the Masterplan as the main western gateway into the Wetlands, just as Drumpellier would be the Park's main eastern gateway.

3.3.1 Current Visitor Facilities, Services and Activities

The primary features of Hogganfield are:

- Hogganfield Loch
    - Island nature reserve
    - Viewing platform
    - Bird and wildlife watching (100 different species recorded at site)
    - Small sandy beach area at southern corner of loch
    - Main play adjacent to sandy beach
    - Boating (zoned – southern corner of loch)
    - Angling (zoned - southern corner and northern stretch of loch)
    - Picnic tables
- Walking and cycling routes (primarily a 2km circular route around the loch)
- Wetlands area – small eastern section of the park and partially bordering loch
- Small woodlands area
- Leathamhill Municipal Golf Course
- Orienteering course
- Events – these are mainly low profile and include:
    - Paddle in the Park
    - Sailing in the City
    - Wild Day Out
    - Orienteering events
    - Big Bird Day
    - LNR Celebrations
    - Wildlife Counts
    - Community Fun Runs

Figure 3.5: Map of Hogganfield Loch



The priority for the development and management of Hogganfield is to strengthen and sustain the natural environment. Alternative activities and visitor development are to some extent seen as a problem to manage, for example "Disturbance by boating and angling are factors which could affect bird species and numbers." (p.24 Hogganfield Management Plan 2011-2016). Thus, development of new activities is best explored around the general grassland amenity and at the proposed visitor centre at the Park's entrance.

3.3.2 Opportunities

A recent visitor survey for the Park Management Plan provides some valuable insights into park use and user preferences. As shown below, most visitors are regular users of the park, with over one-quarter visiting almost every day. The data from the SNH Scottish Recreation Survey presented earlier in the report showed that food and drink is by far the main expenditure item.

Figure 3.6: Hogganfield Loch Frequency of Visits

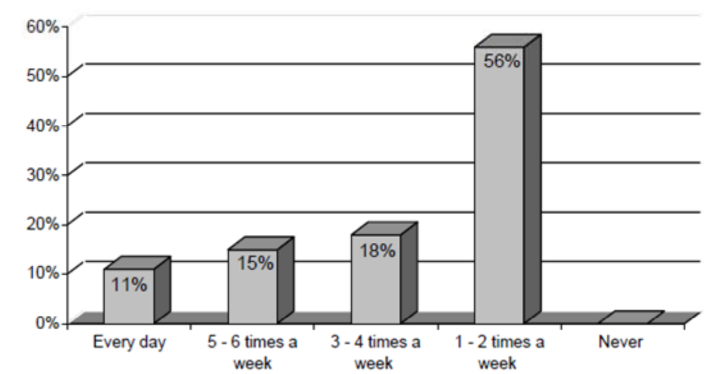


Figure 3.7: Mobile Food Outlet Leaving Hogganfield

There is an obvious facility gap therefore at Hogganfield that could generate a reasonable opportunity for a catering operator. There is an existing mobile food outlet that serves hot food, illustrating the potential.

Our own view is that any visitor centre function – with interpretation and orientation responsibility – should be given over to the catering operator as well.

This is because the maintenance of the information facility would be better managed by an operator whose profit making potential relies on the whole visitor experience within the building. If the catering and information functions are divided, then this creates separate entities with different priorities. Our preference would be to attract a private or social enterprise operator rather than it be run by the local authority as our experience is that a private operator has more scope and motivation to develop the product. A social enterprise of course would have even greater connection with local community and be able to help build local ownership of not only the facility, but Hogganfield Park and the wider Wetlands.

Car parking at Hogganfield is relatively small and this would be a key consideration in developing it as gateway to the Wetlands with accompanying extensive visitor facilities. A number bus routes from Glasgow city centre and there is also cycle path from Cumbernauld to Glasgow city centre which passes the Park.

3.4. Bishop Loch

Bishop Loch is a Local Nature Reserve managed by Forestry Commission Scotland. Lochwood Plantation woodland surrounds a good part of the loch and some pathways.

3.4.1 Current Visitor Facilities, Services and Activities

Some recent pathway work has been upgraded around its southern end. Forestry Commission Scotland provide services to educational groups and run some small scale events throughout the year.

3.4.2 Opportunities

There are no other dedicated facilities around the loch, but its proximity to major residential areas provides it with great potential. It is also one of the larger lochs and, being centrally located, could act as the link between Hogganfield in the west and Drumpellier in the east.

Bishop Loch development should focus on the Local Nature Reserve and ensure that the environment is fit for visitor purpose (access and links to routes and paths, cleanliness, maintenance, etc.).

Figure 3.8: Easter Event at Bishop Loch

Figure 3.9: Upgraded Path at Bishop Loch and Signage in Need of Upgrade

3.5. Frankfield Loch and Cardowan Moss

Frankfield Loch is a little used loch, though this will change with the on-going development of new residential housing around two of its edges.

3.5.1 Opportunities

The Masterplan identifies that as part of these residential developments, a circular pathway will be built around the loch and it will become a Local Nature Reserve.

Some wet woodland lies between the loch and Steeps station. There are also aspirational plans to link the station with loch by creating a path through this woodland.

A viewing platform at the southern end of the loch is proposed in the Masterplan.

3.6. Johnston Loch

Johnstone Loch is one of the smaller lochs of the seven, but does have existing well developed amenities.

3.6.1 Current Visitor Facilities, Services and Activities

Visitor amenities include:

Tea House on the Loch

- Lochend Garden Centre
- Angling area
- School nature learning activities

Figure 3.10: Tea House on the Loch, Overlooking Johnstone Loch

3.6.2 Opportunities

It is a good example of what can be created by local entrepreneurs, with high quality food and drink facilities and a well-used loch side. The Tea House is in fact in the process of extending facilities to meet growing demand for group events (celebrations, weddings, corporate space), thus there is obvious latent demand within the local community; something which is likely to be apparent at other locations across the Park.

3.7. Garnqueen Loch

Garnqueen Loch has a number of wildlife features; hosting mute swans, little and great-crested grebes, moorhens, coots, herons and tufted ducks.

3.7.1 Current Visitor Facilities, Services and Activities

Although this is another of the smaller loch sites, Garnqueen Loch has seen significant recreational development in recent years. In particular, there has been around £1m invested in playground equipment and skatepark within the surrounding Glenboig Village Park. This was funded through a number local authority and other public sector channels, but also through developer and charitable contributions.

In recent years there have been significant upgrades to paths, benches, picnic tables, signage and dipping platforms. These upgrades and the playground development are of a direct result of significant local community effort, thus highlighting the buy-in potential from residents across the Park.

Figure 3.11: Newly Created Play Areas and Upgraded Signage around Garnqueen Loch and Glenboig Village Park

3.7.2 Opportunities

Garnqueen Loch and Glenboig Village Park should continue to develop, with developments led by the very active Glenboig Group, focusing on wellbeing for local communities.

4. Baseline Data

4.1. Entry to a Competitive, Low Growth Market

The visitor attraction market has been relatively stagnant in recent years, meaning that there is potentially insufficient growth in the sector to accommodate a new entrant without displacing the demand for incumbent operators. On the other hand, the creation of a nationally and even internationally recognised destination can act as a driver for demand, similar to the effects seen at the Eden Project in Cornwall or Beamish in Northumberland.

4.2. The Visitor Attraction Sector

This analysis reviews trends in three visitor attractions categories that reflect the main themes of the Wetlands concept, namely:

- Outdoor/Nature Attractions
- Wildlife/Animal Attractions
- Activity Attractions

We will also explore visitation patterns by location and specifically for the Greater Glasgow and Clyde Valley area. Where appropriate, we will present and analyse figures for Outdoor/Nature attractions excluding Strathclyde Country Park, as this facility alone accounts for 40% of this category's visit total. It has a high proportion of non-leisure visits (passing through, driving through, walking the dog, anti-social behaviour) which are not appropriate for inclusion in our deliberations.

4.2.1 Actual Demand

Analysis of selected categories of attractions across theme and location show that the average outdoor/nature attraction and large urban area attractions on average achieve around 145,000 visitors.

Table 4.1: Visits to Selected Attractions by Category, 2009-201010

Theme	*Sample*	Visits 2010	Visits 2009	Average Visits per site 2010
Attraction category				
Outdoors/Nature Attractions	*58*	13,950,024	14,115,914	240,518
Outdoors/Nature Attractions (excluding Strathclyde Country Park)	***57***	**8,239,658**	**7,803,784**	**144,556**
Activity Attractions	*5*	754,109	626,002	150,822
Wildlife/Animal Attractions	*37*	2,498,289	2,586,558	67,521
Urban/Rural				
Large Urban Areas	*106*	20,958,186	21,571,438	197,719
Large Urban Areas (excluding Strathclyde Country Park)	***105***	**15,247,820**	**15,259,308**	**145,217**
Other Urban Areas	*94*	6,354,308	6,020,124	67,599
Accessible Small Towns	*39*	1,193,304	1,223,572	30,598
Remote Small Towns	*47*	1,563,088	1,622,220	33,257
Accessible Rural	*135*	6,241,609	6,085,536	46,234
Remote Rural	*200*	6,641,605	6,572,481	33,208
Former VisitScotland Area				
Greater Glasgow & Clyde Valley	***72***	**14,495,633**	**15,476,665**	**201,328**
Greater Glasgow & Clyde Valley (excluding Strathclyde Country Park)	***71***	**8,785,267**	**9,164,535**	**123,736**

Source: Moffat Centre (2011) Visitor Attraction Monitor 2011

Table 4.2 below illustrates demand for the major outdoor attractions, mainly from the central belt of Scotland. These are almost exclusively country parks with free entry. The average visitor numbers – excluding Strathclyde Country Park - are around 300,000. With Drumpellier Country Park being part of the development, it would appear that a joined-up and well co-ordinated Wetlands Park may be able to tap in to in excess of 1 million visitors per year via this gateway alone. However, a caveat to many country park figures is that it is likely that a significant proportion of these visitors are simply taking a stroll, walking the dog or simply passing through; thus not fully engaged leisure visitors.

Other attractions envisaged to be part of the Wetlands, such as Summerlee Museum of Scottish Industrial Life (c. 70,000 visitors[3]) and Auchinlea Park/Provan Hall (c. 70,000 park users[4]) provide indications of latent demand at themed gateways.

Table 4.2: Visit to Selected Outdoor Attractions

Outdoor Attractions	2010	2009	2008	2007	2006
Strathclyde Country Park	5,710,366	6,312,130	6,275,378	6,254,706	6,245,533
Drumpellier Country Park	1,001,192	1,041,446	951,190	999,023	962,747
Calderglen Country Park	906,999	680,226	407,120	387,366	428,565
Chatelherault Country Park	669,744	674,876	618,930	642,507	492,797
Mugdock Country Park	585,132	585,288	622,375	513,520	543,055
Dean Castle Country Park	555,277	276,523	245,007	268,653	261,867
Blair Drummond Safari and Adventure	439,020	397,502	388,600	433,070	402,701
Gleniffer Braes Country Park	318,825	416,688	352,959	355,219	378,120
Forfar Loch Country Park	207,646	199,317	202,979	185,863	161,082
David Marshall Lodge	150,455	173,348	181,920	185,978	165,231
Queens' View Visitor Centre	144,000	150,000	140,000	158,138	143,762
Heads of Ayr Farm Park	142,019	129,858	119,919	104,816	82,315
Crombie Country Park	134,614	115,040	120,036	121,581	143,788
Landmark Forest Adventure Park	129,427	141,793	127,460	140,600	134,000
Highland Wildlife Park	123,404	125,513	78,683	62,676	67,000
James Hamilton Heritage Park	122,700	126,800	126,800	143,465	107,800
Almond Valley Heritage Centre	116,707	118,649	100,166	85,786	84,375
Glen Nevis Visitor Centre (Ionad	100,000	110,000	110,000	88,000	90,000
Clyde Muirshiel Regional Park, Castle	82,628	75,896	79,582	80,755	81,190
Total	11,640,155	11,850,893	11,249,104	11,211,722	10,975,928
Total (excluding Strathclyde Country	5,929,789	5,538,763	4,973,726	4,957,016	4,730,395
Average visitor numbers	329,433	307,709	276,318	275,390	262,800

Source: Moffat Centre, Visitor Attraction Monitors 2006-2010

As shown in Table 4.3, these attractions have performed significantly above the visitor attraction sector as a whole for the last five years. This is partially explained by the recession and subsequent staycation phenomenon, but such attractions generally perform well whatever the economic conditions. This is primarily because this sector has a much greater proportion of local visitors than other sectors, as illustrated in Table 2.4. Indeed, for country parks sub-segment, around 8 out of 10 visitors are from the local area.

[3] Last available figure from Visitor Attraction Monitor 2008

[4] Glasgow City Council (2009), Auchinlea Park and Provan Hall House Visitor Analysis Report

Table 4.3: Performance of Selected Outdoor Attractions

% change in visits	2010-09	2009-08	2008-07	2007-06
% change at selected nature/wildlife/outdoor attractions (Constant sample: 18)	7.1%	11.4%	0.3%	4.8%
% change Greater Glasgow & Clyde Valley (Constant sample: 53)	-3.1	3.6	-5.9	3.1
% change in all attractions in Scotland (Constant sample: 485)	-2.1%	3.7%	-3.6%	2.6%

Source: Moffat Centre, Visitor Attraction Monitors 2006-2010

As shown in Table 4.4, Outdoor/Nature Attractions receive of their visitors from local residents and other Scottish residents. In the latter case, this will primarily be from Scottish residents within a 2-hour drive time of such attractions. Both Wildlife/Animal and Activity categories also have a distinctly local appeal, with each receiving roughly two out of three visitors from local residents or other Scots.

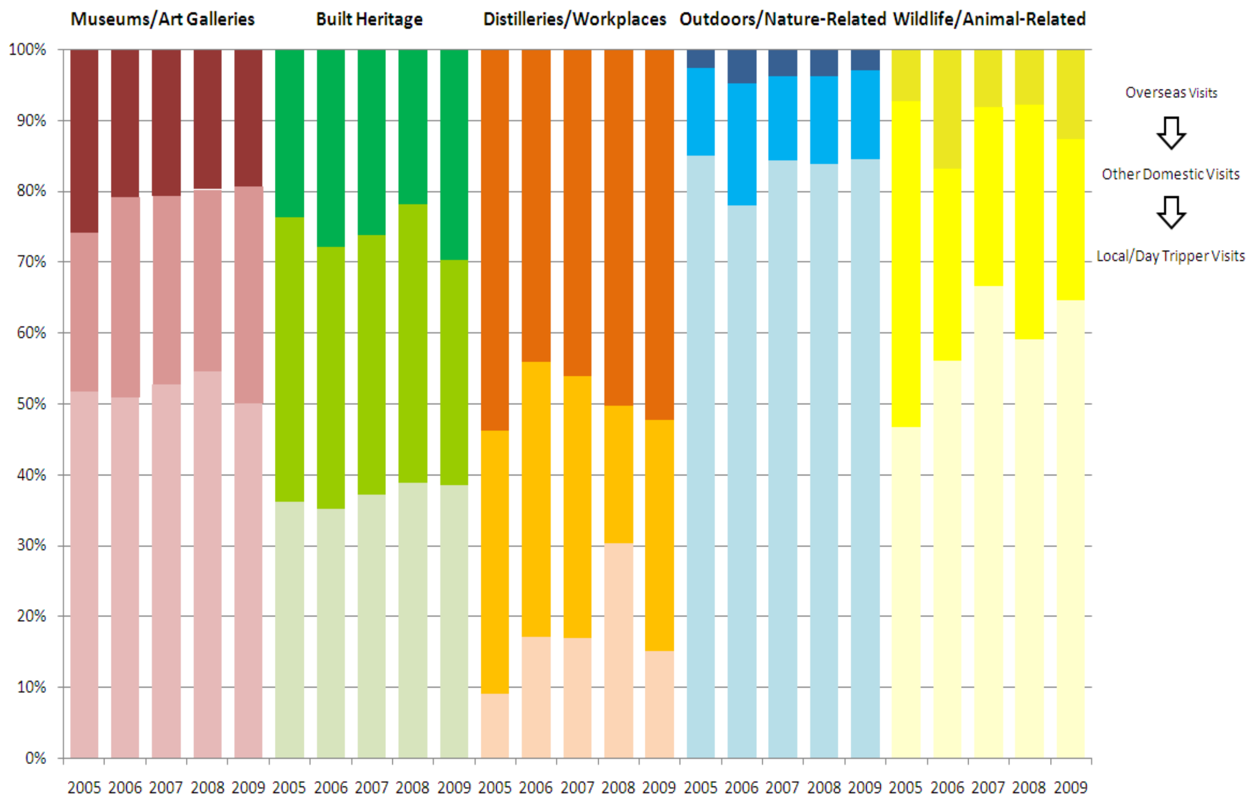
Table 4.4: Visitor Origin by Attraction Category

Attraction Category	*Sample*	% Locals*	% Scotland	% Other UK	% Overseas
Outdoors/Nature Attractions	*40*	**63.3**	19.1	13.1	4.6
Wildlife/Animal Attractions	*20*	**40.7**	25.1	24.4	9.9
Activity Attractions	*5*	**38.4**	31.4	27.6	2.6
Castles/Forts	*37*	4.1	36.3	18.2	41.4
Distilleries/Breweries/Wineries	*28*	9.5	13.1	29.0	48.4
Gardens	*11*	40.0	28.6	24.8	6.5
Heritage Centre	*17*	27.3	24.3	27.2	21.2
Historic Houses/Palaces	*16*	21.4	21.3	25.4	31.9
Industrial/Workplaces	*2*	25.5	15.0	40.0	19.5
Museums/Art Galleries	*113*	39.0	25.1	21.3	14.6
Other Historic Properties	*33*	8.9	29.2	27.7	34.2
Places of Worship/Spiritual Attractions	*8*	18.6	26.8	27.9	26.8
Scottish Crafts/Retail Attractions	*7*	31.6	21.3	28.6	18.6
Transport-Related Attractions	*4*	23.8	9.5	43.3	23.5

* Locals are defined as being within one hour's drive of the attraction

Source: Moffat Centre (2011), Visitor Attraction Monitor 2010

Figure 4.1: 5-year trend in visitation to Scottish attractions by visitor origin



Source: Moffat Centre, Visitor Attraction Monitors 2006-2010

As shown in Table 4.5 below, stand-alone nature reserve attractions tend have less demand than outdoor attractions in general. This may be because many are paid entry and/or membership operations, while the pre-visit guarantee of exceptional sightings or significant interaction is variable. Nonetheless, a wildlife feature that sits within a broader visitor offer could attract a significant portion of natural heritage and educational visitors.

Table 4.5: Visit to Selected Wildlife/Animal Attractions

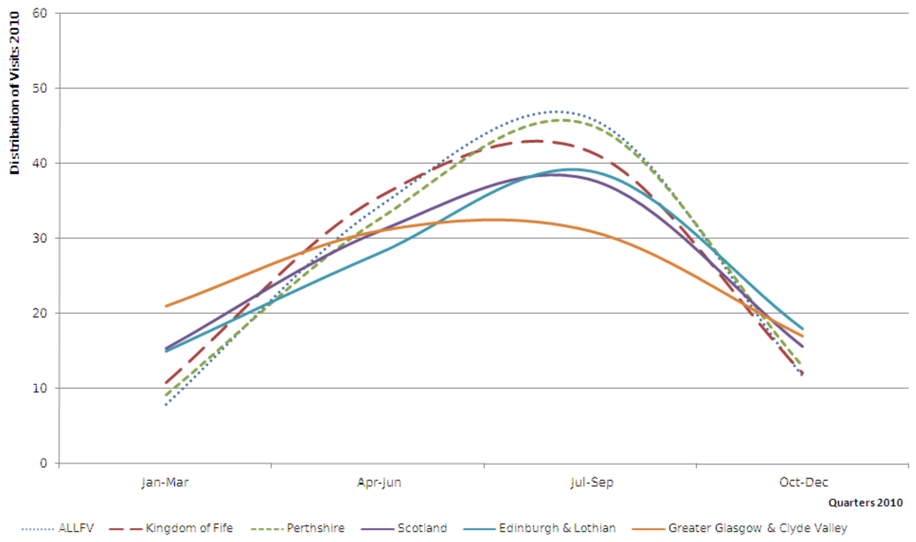
Attraction (Wildlife/Animal Attractions)	2010	2009	Regi	Paid/Fr	Opening
WDCS Wildlife Centre, Spey Bay	64,610	54,239	AB	Free	All Year
RSPB (Vane Farm), Kinross	56,384	56,191	PE	Paid	All Year
Camperdown Wildlife Centre, Dundee	52,905	59,650	AN	Paid	All Year
Loch Muick & Lochnagar Wildlife Reserve, by	38,743	50,397	AB	Free	All Year
RSPB Lochwinnoch Nature Reserve,	31,050	29,554	GG	Paid	All Year
Galloway Wildlife Conservation Park,	29,279	30,820	DG	Paid	All Year
RSPB Shetland (Sumburgh Head Reserve), Virkie	28,000	28,000	SH	Free	All Year
Falls of Clyde Wildlife Reserve and Visitor Centre,	20,000	24,376	GG	Paid	All Year
Loch of the Lowes, Dunkeld	17,382	5,750	PE	Paid	All Year
Jedforest Deer & Farm Park, Jedburgh	11,500	12,729	SB	Paid	SEASONAL
Montrose Basin Wildlife Centre, Montrose	10,980	12,859	AN	Paid	All Year
RSPB Forsinard Reserve, Forsinard	4,891	3,821	HI	Free	SEASONAL
World Horse Welfare, Aboyne	1,305	1,183	AB	Free	All Year

Source: Moffat Centre (2011), Visitor Attraction Monitor 2010

4.3. Seasonality of Demand

The graph below illustrates quarterly visitation curves to visitor attractions across the central belt of Scotland. This indicates that Greater Glasgow and Clyde Valley has the least seasonal demand among the areas.

Figure 4.2: Seasonality of Visits to Attractions



Source: Moffat Centre (2011), Visitor Attraction Monitor 2010

Additionally, analysis by attraction category overleaf shows that outdoor attractions are the least seasonal of all. This is primarily because the sort of activity undertaken at such locations (walking, cycling, water sports) is not as dependent on good weather as other attractions; while visitation is predominantly from local users who are more free from the risk of taking a long journey that might be ruined by the weather. These are attractive features when considered by private sector operators, who would necessarily want to have consistent demand throughout the year.

Figure 4.3: Quarterly Visitation Pattern to Heritage Attractions

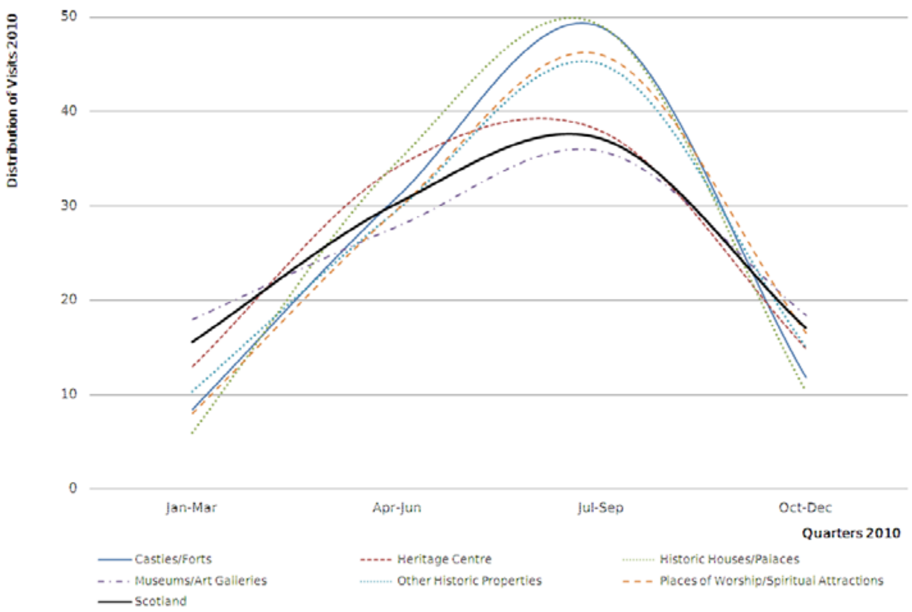


Figure 4.4: Quarterly Visitation Pattern to Workplaces, Retail-Oriented Attractions and Transport-Related Attractions

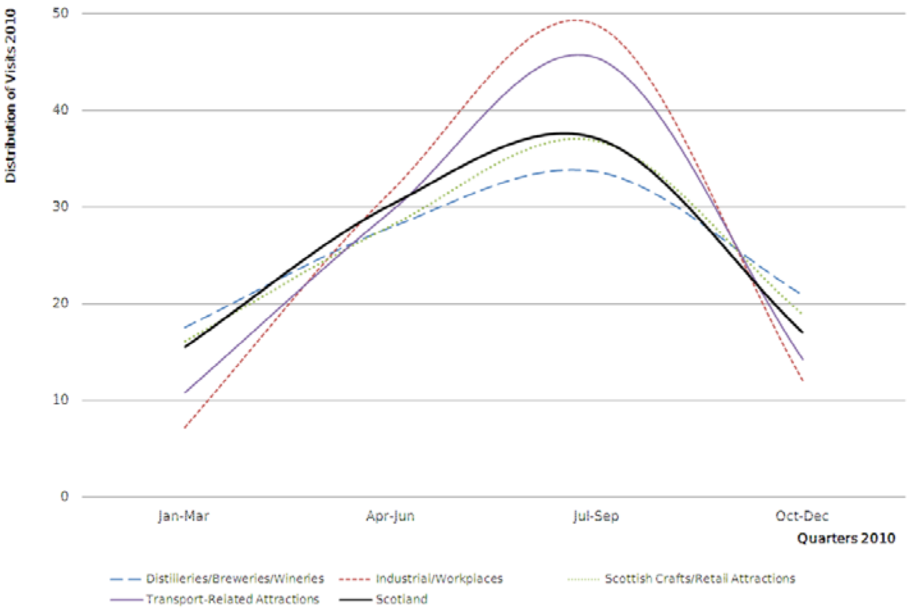
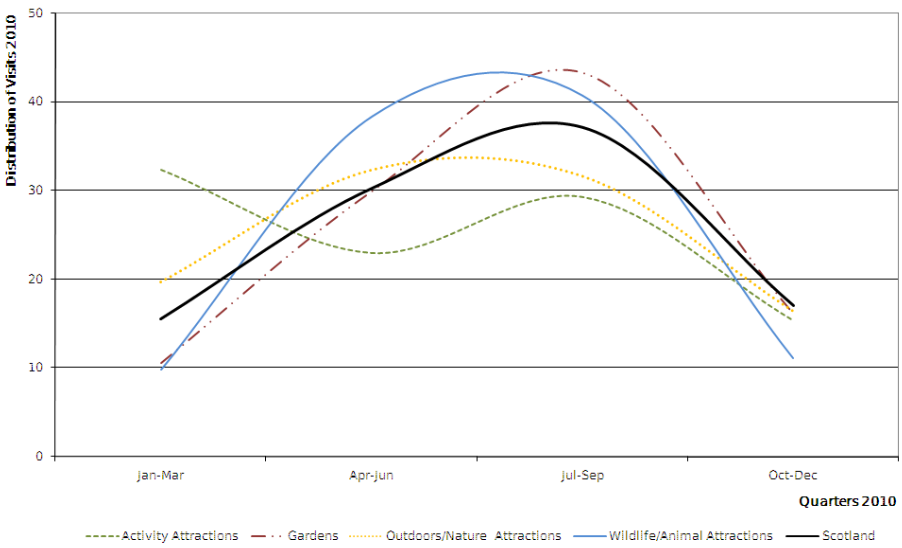


Figure 4.5: Quarterly Visitation Pattern to Outdoor Attractions



The Scottish Recreation Survey 2010 [5] estimates that the Glasgow City Council area receives on average 20.8 million day visitor per year, North Lanarkshire 8.2 and South Lanarkshire 7.8 million. Thus, this equates to a market of nearly 37 million outdoor recreational visitors per year. Two-thirds of Lanarkshire residents stay within their local authority area on their outdoor visits, while only just over one-third (37%) of Glasgow City residents do so. As shown in Table 4.6 overpage, the average round-trip distance travelled by day visitors was 11 miles (18km) and this has been relatively constant in recent years. This of course equates to a radius of only 5-6 miles and perhaps illustrates why the Visitor Attraction Monitor data shows that outdoor attractions get the bulk of their visitors from local residents.

[5] Scottish Recreation Survey: annual summary report 2010. Scottish Natural Heritage Commissioned Report

Table 4.6: Average Distance Travelled on an Outdoor Visit

Distance	Total 2004	Total 2005	Total 2006	Total 2007	Total 2008	Total 2009	Total 2010
	%	%	%	%	%	%	%
<2 miles (<3.2km)	30	33	36	38	39	41	41
2 – 5 miles (3.2 – 8km)	30	31	32	29	34	32	30
5.1 – 10 miles (8.1 – 16.1km)	12	11	13	12	10	9	12
10.1 – 20 miles (16.2 – 32.2km)	7	10	6	8	5	6	5
20.1 – 40 miles (32.3 – 64.4km)	7	5	5	6	4	5	5
40.1 – 60 miles (64.5 – 96.5km)	4	4	2	2	2	2	4
60.1 – 80 miles (96.6 – 128.7km)	4	2	2	1	2	1	2
>80 miles (>128.7km)	1	6	4	3	3	3	4
Don't know	1	*	*	1	1	1	*
Mean distance – miles	*16*	*15*	*12*	*11*	*9*	*10*	*11*
Mean distance - km	*26*	*24*	*19*	*18*	*15*	*16*	*18*
Base	*1,873*	*2,231*	*2,182*	*1,915*	*2,328*	*2,273*	*2,364*

Source: Scottish Recreation Survey 2010: annual summary report 2010. Scottish Natural Heritage Commissioned Report

Urban residents are significantly more likely to use the local park or open space (65%), which is unsurprising as it is for many the only outdoor option. Nonetheless, this illustrates again the latent demand for an improved outdoor space offer. The use of lochs and rivers is less pronounced for urban dwellers but this is perhaps a function of access and facilities.

Table 4.7: Use of Outdoor Spaces by Resident Location

Type of Outdoor Space	Countryside	Urban	seaside
	%	%	%
Local park or open space	31	65	20
Woodland/forest area	30	5	4
Farmland	16	2	3
Mountain/moorland areas	14	1	4
Rivers and canals	9	8	3
Villages	9	9	6
Lochs	8	2	2
Town	1	8	2
Beaches/cliffs	6	4	74
The sea/sea lochs	3	2	25
Wildlife area	8	3	10
Other	1	2	*
Base	3,773	2,286	1,043

Source: Scottish Recreation Survey 2010: annual summary report 2010. Scottish Natural Heritage Commissioned Report

4.4. Revenue

4.4.1 Average Spend

The average spend per visitor in retail and catering in 2010 was £1.71 and £1.40 respectively. It should be noted that these figures represent average across all visitors, including those who did not spend anything. The figures indicate that a typical outdoor attraction achieves income of £190,000 from these two revenue streams, while a wildlife attraction achieves a much higher return of just under £370,000.

Table 4.8: Average Retail Spend at Selected Visitor Attractions

Attraction Category	*Responding Sample*	Average Spend per Visitor	Average Retail Income per Attraction
Outdoors/Nature Attractions	*14*	£0.51	£84,636
Wildlife/Animal Attractions	*13*	£1.89	£153,325
Activity Attractions	*	*	*
Castles/Forts	*38*	£2.73	£179,898
Distilleries/Breweries/Wineries	*12*	£10.39	£451,188
Gardens	*3*	£1.61	£250,247
Heritage Centre	*11*	£3.10	£49,742
Historic Houses/Palaces	*13*	£2.70	£172,494
Industrial/Workplaces	*		
Museums/Art Galleries	*80*	£1.15	£65,970
Other Historic Properties	*34*	£1.38	£32,570
Places of Worship/Spiritual Attractions	*9*	£1.55	£74,180
Scottish Crafts/Retail Attractions	*3*	£2.27	£191,593
Transport-Related Attractions	*	*	*
Total	*265*	*£1.71*	*£102,481*

Source: Moffat Centre (2011), Visitor Attraction Monitor 2010

Table 4.9: Average Catering Spend at Selected Visitor Attractions

Attraction Category	*Responding Sample*	Average Spend per visitor	Average Catering Income per Attraction
Outdoors/Nature Attractions	*10*	£0.52	£101,009
Activity Attractions	*3*	£3.82	£635,745
Wildlife/Animal Attractions	*11*	£2.32	£211,243
Castles/Forts	*11*	£1.45	£282,688
Distilleries/Breweries/Wineries	*5*	£2.52	£199,711
Gardens	*		
Heritage Centre	*6*	£2.23	£31,088
Historic Houses/Palaces	*8*	£2.27	£207,295
Industrial/Workplaces	-		
Museums/Art Galleries	*22*	£0.75	£104,343
Other Historic Properties	*5*	£1.34	£106,600
Places of Worship/Spiritual Attractions	*	*	*
Scottish Crafts/Retail Attractions	*	*	*
Transport-Related Attractions	*	*	*
Total	***89***	***£1.40***	***£169,958***

Source: Moffat Centre (2011), Visitor Attraction Monitor 2010

It is interesting that three-quarters of outdoor recreation visits involve no expenditure at all and illustrates perhaps the level of functional activity (walking the dog, passing through, etc.) over proactive leisure pursuits. This does not mean that three out of four people do not ever spend money during a day visit, but that they only spend money in one out of every four visits. Thus, all visitors are generally open to persuasion if there is a worthwhile offer. Amongst those who made purchases, the main category of expenditure continues to be on food and drink, where one out of five visits involved a purchase in this category. Thus, a visible and quality food element within of the Wetlands will be very important.

Table 4.10: Spending categories during outdoor visits

Spending Categories	Total 2004 %	Total 2005 %	Total 2006 %	Total 2007 %	Total 2008 %	Total 2009 %	Total 2010 %
Food & drink	29	26	25	22	26	23	20
Fuel	16	9	8	6	7	6	6
Gifts/souvenirs	4	5	4	3	3	3	2
Public transport fares	2	2	2	3	2	1	1
Car parking	3	2	3	2	2	2	2
Maps/leaflets	1	1	1	1	*	*	1
Hire of equipment	1	1	1	1	*	*	*
Purchase of equipment	1	1	1	1	*	1	*
Others	4	4	3	3	3	3	3
Any money spent	*37*	*31*	*30*	*28*	*32*	*28*	*25*
No money spent at all	*63*	*69*	*70*	*72*	*68*	*72*	*75*
Base	*1,873*	*2,231*	*2,182*	*1,915*	*2,328*	*2,273*	*2,364*

Source: Scottish Recreation Survey 2010: annual summary report 2010. Scottish Natural Heritage Commissioned Report

4.4.2 Dwell Time and Its Impact on Spending

We also know that revenue generation potential is correlated to dwell times, i.e. the higher the dwell time – particularly in catering and retail areas – the higher the average spend per visitor. Dwell time can be influenced by the surroundings, level and nature of activities provided and information provision at an attraction.

In 2010, operators reported that on average visitors spent 10 minutes in the catering operations and 9 minutes in the retail operations, with Historic Houses/Palaces and Heritage/Visitor Centres identifying the highest average dwell time in Catering operations, and Heritage/Visitor Centres and Nature Reserves/Wetlands/Wildlife Trips the highest in Retail.

Figure 4.6: Average Dwell Time at Outdoor/Nature Attractions

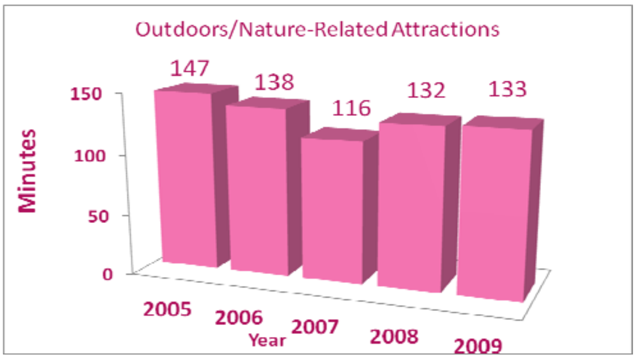
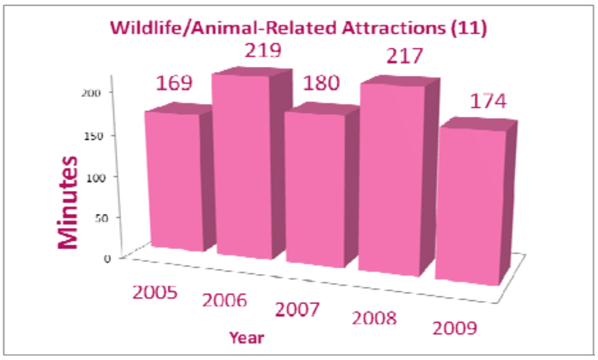


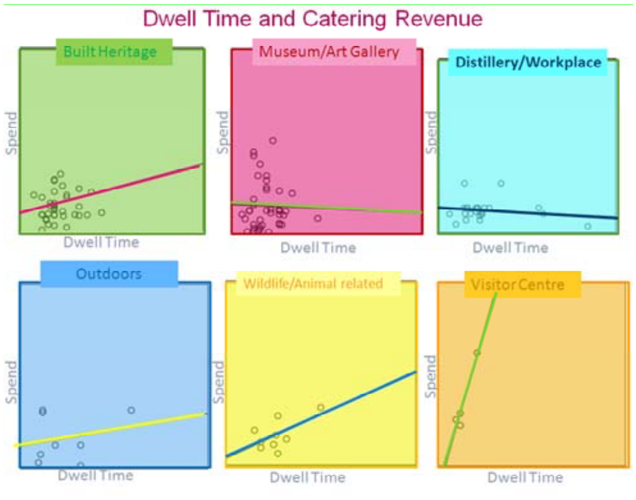
Figure 4.7: Average Dwell Time at Wildlife/Animal Attractions



Source: Visitor Attraction Monitor 2006-2010, constant sample data

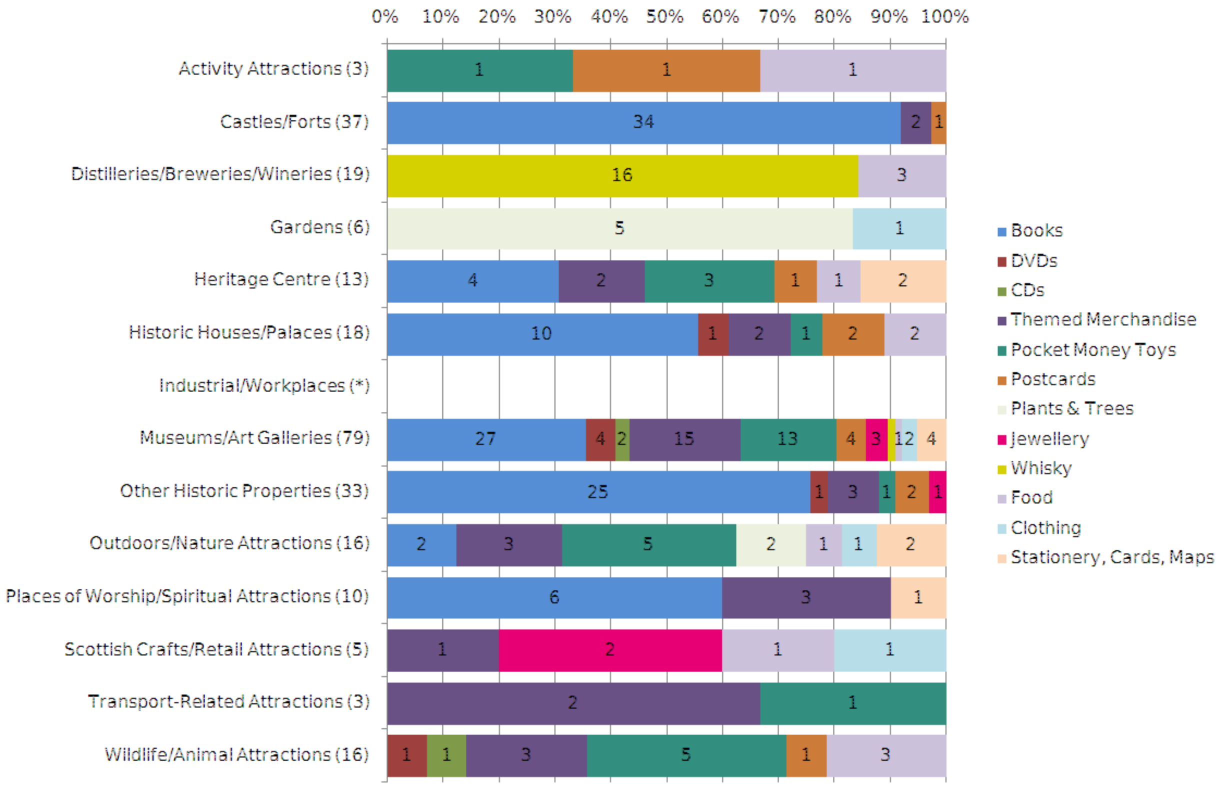
Figure 4.8: Relationship Between Dwell Time and Retail Revenue

Figure 4.9: Relationship Between Dwell Time and Catering Revenue



Source: Visitor Attraction Monitor 2006-2010, constant sample data

Figure 4.10: Most Popular Retail Items Across Attractions Categories



Source: Moffat Centre (2011), Visitor Attraction Monitor 2010

4.5. Importance of Children in Visit Decisions

The proportion of adults to children among relevant attraction types ranges between 4:1 and 3:1. However, a significant proportion of these adults will be accompanied by children. As such, the influence of children is much more pronounced than it may at first appear. It is also interesting that the three categories of attractions pertinent to the Wetlands situation also have the highest proportions of children. This is likely to be a function of a greater activity component and generally less prescriptive, pre-determined visitor experience.

Table 4.11: Visits by Adults and Children

Attraction Category	% Adults	% Children
Outdoors/Nature Attractions	70.2	29.8
Activity Attractions	68.6	31.4
Wildlife/Animal Attractions	64.4	35.6
Castles/Forts	79.9	20.1
Distilleries/Breweries/Wineries	91.1	8.9
Gardens	80.6	19.4
Heritage Centre	77.2	22.8
Historic Houses/Palaces	85.5	14.5
Industrial/Workplaces	77.4	24.4
Museums/Art Galleries	77.0	23.0
Other Historic Properties	83.6	16.4
Places of Worship/Spiritual Attractions	84.9	15.1
Scottish Crafts/Retail Attractions	83.1	16.9
Transport-Related Attractions	80.1	19.9

A Mintel (2010) report *Children's Sports Activities* explores the influence parents, peer groups and institutional bodies. There appears to be a shift in influence with age, where the influence of peers becomes greater as children move between primary and secondary school- non-lesson and friendship based participation is more common. Younger groups are understandably are still led primarily by parents and other family members. This has particular significance for the design and promotion of any physical activities in the Wetlands, where gaining approval of the youth grouping will be very important. Activities that can be designed to appeal to both youth groups and families without impinging on either group's core motivations will be a difficult balance to achieve. The report identifies "*offers for under-10s that should play on the health and development aspects that appeal to the parents, while elements of image, technology, endorsement and exclusivity that attract peer approval should be more to the fore.*"

Some of the benchmark locations reviewed later in the report have used different approaches to varying degrees of success.

Table 4.12: How children participate in sport, July 2010

Participation	%
During school time (aside from compulsory PE or games lessons)	75%
Casually with friends (not as part of an organised club)	52%
Casually with family (not as part of an organised club)	50%
At an after-school/weekend club run by the school	43%
At an externally run club (e.g. football, rugby, cricket club etc.)	38%
Casually on their own (e.g. running/cycling alone)	35%
Private lessons with an instructor	11%
Other	3%

Source: Mintel (2010), Children's Sports Activities - UK

4.5.1 Educational Market

It has been indicated that the schools market will be an important segment for the Wetlands. However, setting targets for this market should be developed in the context of what proportion of visits do schools represent for outdoor attractions. As shown in Table 4.13, only 1.1% of visitors to outdoor attractions came from schools, while for activity attractions it was 2.2% and for wildlife/animal attractions it was 4.8%.

Table 4.13: School Visits to Attractions

Attraction category	*Sample*	Total School Visits 2010	Total Visits 2010	% School Visits
Activity Attractions	5	15,843	754,109	2.1
Castles/Forts	*39*	64,893	2,569,130	2.5
Distilleries/Breweries/Wineries	*12*	3,286	292,796	1.1
Gardens	*12*	21,822	1,631,424	1.3
Heritage Centre	*13*	13,937	993,132	1.4
Historic Houses/Palaces	*19*	15,875	802,699	2.0
Industrial/Workplaces	*3*	3,416	91,858	3.7
Museums/Art Galleries	*118*	328,039	5,694,369	5.8
Other Historic Properties	*38*	42,520	1,148,796	3.7
Outdoors/Nature Attractions	*36*	60,338	5,507,265	1.1
Places of Worship/Spiritual Attractions	*9*	10,358	1,016,614	1.0
Scottish Crafts/Retail Attractions	*3*	2,250	396,298	0.6
Transport-Related Attractions	*5*	34,464	687,673	5.0
Wildlife/Animal Attractions	*26*	80,030	1,667,385	4.8

Source: Moffat Centre, Visitor Attraction Monitor 2011

As shown below however, there appears to be an appetite for outdoor activity among schools so that the key is in product development that meets curriculum needs and promotional activity that gets to schools in an effective manner.

Table 4.14: Percentage of schools offering outdoor activities, 2003-04 and 2004-05

Outdoor Activities	% of schools 2003-04	% of schools 2004-05
Outdoor/adventurous	68	67
Orienteering	46	48
Cycling	21	27
Canoeing	17	20
Mountaineering	7	9
Sailing	8	8
Equestrian	3	3
Triathlon	1	2
Skateboarding	1	1
Angling	1	1

Source: Mintel, Sporting Activities in the Great Outdoors - UK - January 2006

4.5.2 Grandtravel/Grand Leisure

Grandtravel and grand leisure are terms to describe the emergence of grandparents taking increasing responsibility for managing the leisure time of their grandchildren; providing some ‘breathing space’ for parents.

The Grandtravel product has been developed by a number of organisations, targeting trips that are derived from celebrating a grandchild's graduation, celebrating a school award or a special birthday. The sales pitch also emphasises the simple concept of providing an opportunity for both child and grandparent to bond:

- Itineraries that stimulate curiosity, encourage exploration and discovery and are fun-filled.
- Private time together -- an important part of the experience.
- Opportunities to relate to each other on an intergenerational level and to connect with the family's past.
- Peer activities, where, at some times during the trip, grandchildren will enjoy activities only with other grandchildren and grandparents only with other grandparents

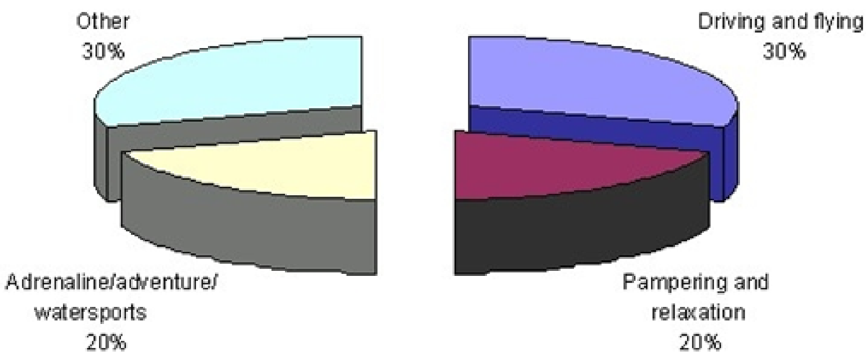
Figure 4.11: Grandtravel group on an activity trip

4.6. ‘Experience’ Market

The growth of the ‘experience’ market is an illustration of the diversification of leisure interests among the UK population and an appetite to ‘dabble’ in a range of activities. As shown in Figure 4.10, adrenaline sports including extreme sports/water sports are one of the core experience markets. Mintel estimate that that softer, pamper and lifestyle-oriented products will grow fastest as the market continues to diversify, but the core markets will also continue to grow (Experience Days Out - UK - January 2007).

The estimated value of the UK experience market is around £100 million at 2006 prices, therefore extreme sports/water sports packages account for around £20 million.

Figure 4.12: Estimated segmentation of the experience days out market, by value, 2006



Source: Mintel, Experience Days Out - UK - January 2007

Adrenaline sports also appear to have the most significant levels of non-participation within the experience market, illustrating that there is a large portion of the population who have no interest in these activities.

Table 4.15: - Experience of/interest in experience days out, November 2006 (%)

	Have experienced	Would like to experience	Not for me
	%	%	%
Driving (e.g. go-karts, rallying, quad bikes etc.)	28	32	41
Riding (e.g. horse riding/trekking)	27	25	48
Shooting/archery	27	32	41
Sport (ego venue tours, participation etc.)	24	20	56
Adventure (e.g. paintball, climbing, assault course etc.)	23	26	52
Wildlife/nature (e.g. whale watching)	21	55	24
Hobby/creative (e.g. learning how to garden, sculpt etc.)	19	36	45
Water sports (e.g. surfing, rafting etc.)	19	24	57
Multi-experience day out (e.g. stag/hen day)	17	23	60
Aviation (e.g. flying lesson, helicopter trip, ballooning etc.)	14	45	41
Pamper/body & soul (e.g. spa day, flotation tank etc.)	14	48	38
Dining (e.g. murder mystery dinner, wine tours, cooking classes)	12	49	38
Fame (e.g. recording studio, circus skills, dancing etc.)	6	22	72
Sky diving/bungee	5	24	71

Source: Mintel, Experience Days Out - UK - January 2007

4.7. Lessons from Benchmarks

A number of benchmarks for the original Masterplan and vision explored primarily wetland and habitat creation and management, with additional exploration of how the visitor might engage with spaces created. There was little exploration of visitor development and business opportunity creation, or how the Park might be self-financing.

A number of attractions were explored to provide insights into potential innovative visitor activities, commercial opportunities and marketing development:

- Cotswold Water Park
- BeWILDerwood (Norfolk Broads)
- Trentham Estate (Stoke-on-Trent)
- Mugdock Country Park (Glasgow)
- Transition Extreme (Aberdeen)
- Water of Leith (Edinburgh)

Lessons to be drawn from the benchmarks include:

- Everyone likes to be by the water.
- Innovative, low impact use of water resource.
- Innovative use of forests and woodlands.
- People will spend if they see value for money.
- Are there options for designating any areas as paid for entry?
- Activities should be zoned or compartmentalised to help manage different visitor aspirations; thereby also avoiding conflict between various users.
- Product offer needs updated regularly. Investment in upgrades must be incorporated from the outset into the business model and finances.
- Older generations are more active than ever and want to take part in activities.
- Youth generation sometimes wants its own space and consideration should be given to involvement in design of space.

- The value of ‘free’.

These lessons have been considered and integrated within the Visitor Planning and Recreation Development Activities outlined in the following section.

More detailed information on the benchmarks is available in Appendix 1.

5. Visitor Planning and Recreation Development

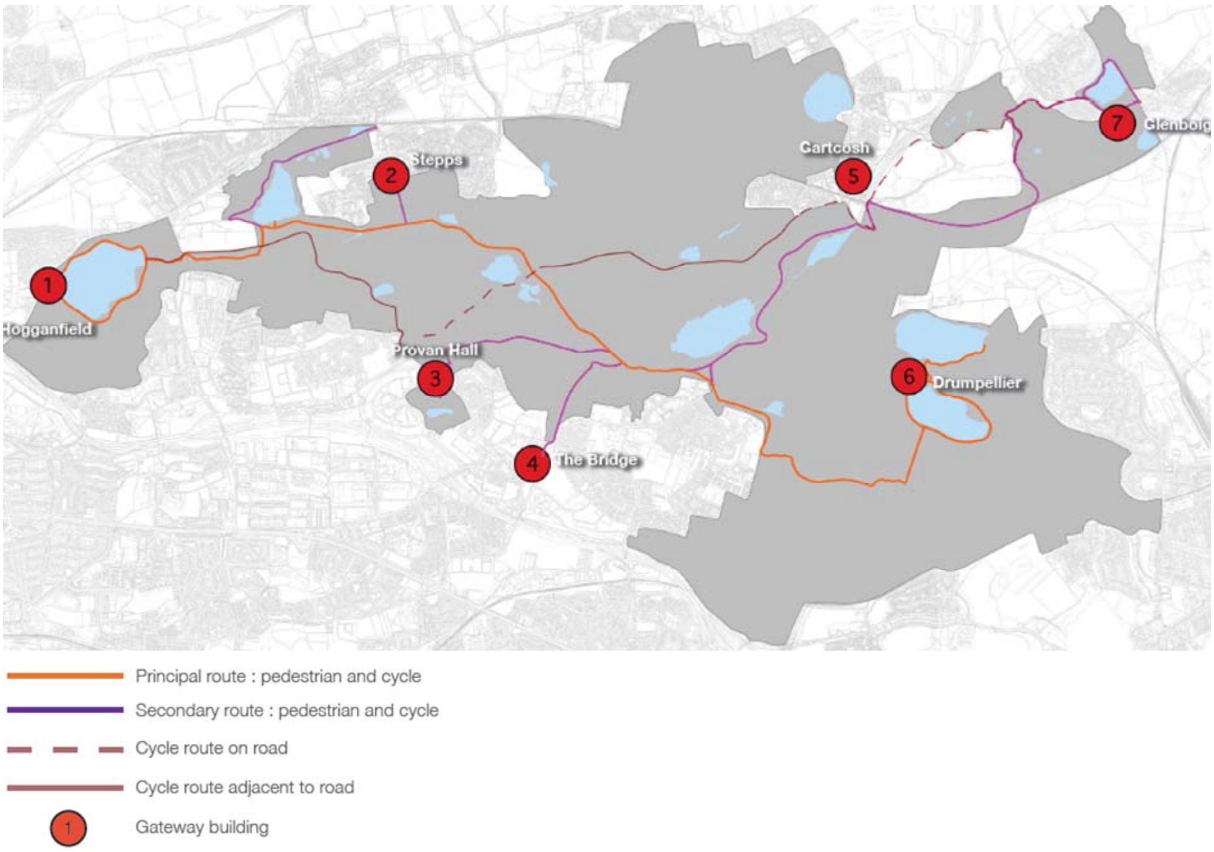
5.1. Key Development 1 – Making Connections (1) Addressing Access and Sense of Place

5.1.1 Route Development

Fundamental to the creation of the Wetlands as a single entity will be the ability for visitors travel as seamlessly as possible to different parts of the Park. If this is not achieved to a reasonable level, then it will be difficult for visitors to experience much beyond their local facility. In the simplest terms, the visitor experience of a destination is a collection of interactions. If this collection of interactions is confined to say Drumpellier Country Park, then it will not really be seen as a Wetlands experience.

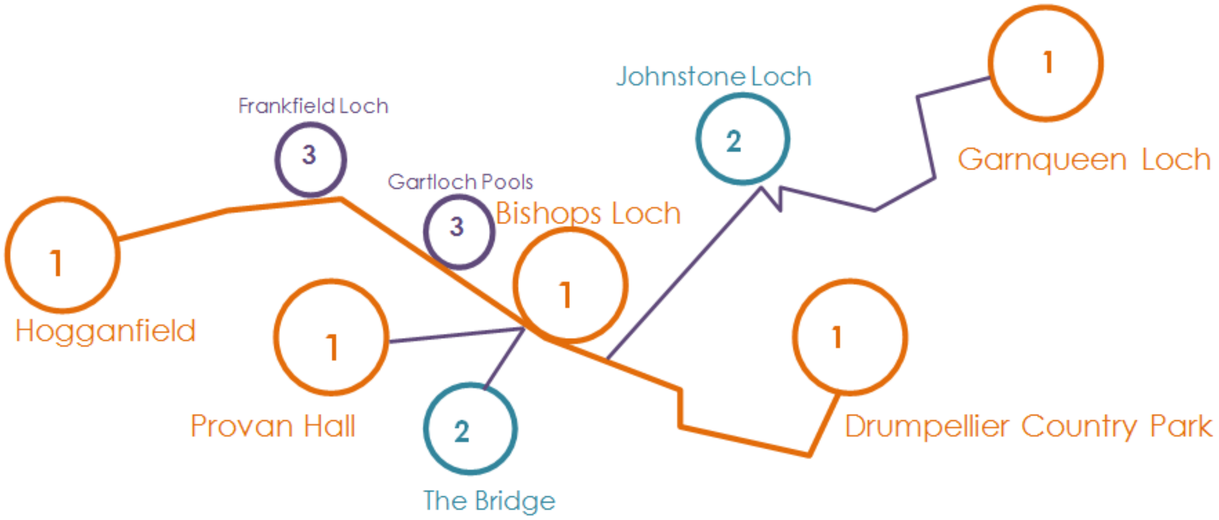
The Masterplan has identified a number of barriers to joining up the various parts of the Wetlands; including infrastructure issues, land ownership and landscape restrictions. Nonetheless, assuming these can be overcome, the vision for phase 1 of the development is to create a 'Principal Route' that is able to be used by pedestrians and cyclists. This will connect the two key gateways of the Wetlands at Hogganfield Park in the west to Drumpellier Country Park in the east. In effect, this will act as the spine of the Park, supporting secondary and tertiary access points, visitor activities, visitor amenities and day-to-day management.

Figure 5.1: Masterplan Route Development



This will be at the forefront of any partnership driven funding bids, in tandem with habitat creation and management.

Figure 5.2: Prioritising Amenity Development



If the initial focus for visitor development is 'local', an agreed key focus of the recreation strategy is to encourage people to explore beyond the immediate vicinity but within an identifiable local area.

5.1.2 Arrival Nodes

Car borne visitors- a reality of most leisure day visits is that the car remains the major form of transport. Thus, although the Wetlands will have an important role in encouraging more sustainable forms of travelling to the Park, there should still be sufficient car parking space at key entry points. Car parking at Drumpellier Country Park for example is already stretched at certain times of the summer, whereby visitors are required to park on the busy Townhead Road that has a 60mph limit. There could be significant capacity issues therefore if a successful Wetlands increases demand.

The Masterplan has identified nine gateway sites in total, not all of which have significant dedicated parking.

Cyclists – there has been a remarkable increase in the number of leisure cyclists, supported by organisations such as Sustrans who have created a strong network of local and national routes; VisitScotland and regional DMOs; as well as dedicated cycling destinations such as Glentress in the Scottish Borders. In order to encourage visitors to arrive by cycle, the Wetlands will need to work closely with partners in developing links with regional and national routes.

Developments such as the green bridge that will connect Drumpellier and principal route through the park are seen as essential in the Masterplan.

Figure 5.3: Artist's impression of green bridge connecting Drumpellier to wider Park

Figure 5.4: 'Green' Bridge (Grassed) at Mile End Park, London, Joining Sections of the Park Over Busy Road

Cycle Hire – a business development opportunity for the private or social enterprise sector will be created by locating cycle hire facilities at one or a number of gateway sites or public transport hubs. Indeed, these facilities will be essential in helping manage any capacity issues that may arise from the increased demand that may ensue from a highly successful Wetlands Park. Suggestions have been made for locating these facilities at Drumpellier and/or Hogganfield, but this may in fact exacerbate car parking capacity problems as people arrive by car to access the cycles. Another option is to site the cycle hire at local train stations or nearby attractions. For example, to manage capacity at Drumpellier, the cycle hire could be located at the Blairhill Station or incorporated into the Summerlee Heritage Centre at Coatbridge Central Station.

Public transport – the Wetlands marketing strategy will have a particular focus on marketing the offer through public transport nodes such as train stations and bus stations, as well as on the transport itself.

5.1.3 Creating a Sense of Place

Co-ordinated Interpretation and Signage

There is an opportunity to pool partner resources to provide co-ordinated, branded signage and interpretation at key locations and attractions. This will help cement the sense of 'destination' as visitors experience a co-ordinated message at various points on their journey. An audit of existing signage should be undertaken so that Wetlands signage is co-ordinated with partner signage.

The main task will be to balance stakeholder needs in terms of the story they want to tell and projecting their own message, with the wider Wetlands destination brand we would want to embed.

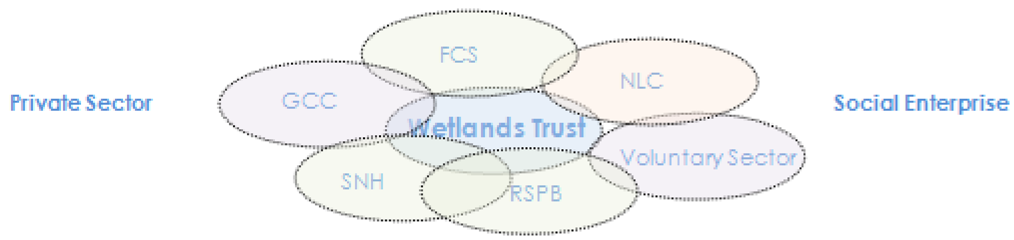
Security

Enhancing access for people to enjoy the Park also brings with it the likelihood of enhancing opportunities for forms of anti-social behaviour. Anecdotal evidence from consultations provides some insight; the Tea House on the Loch at Johnston Loch has had several thefts following improved access. So any route development should take this into account. This is why it will be important to engage the community as much as possible in volunteering and private sector/social enterprise ventures in order to maximise self-policing of the Park.

5.2. Key Development 2 – Amenity Development

Amenity provision in the disparate parts of the Park is delivered by a number of local authority departments and agencies such as FCS, SNH, and RSPB. As illustrated in the diagram below, a Wetland Trust type body will be required to work alongside these organisations to enhance the management capacity for delivering an integrated set of services. Of course, where possible, the private and social enterprise sectors should be encouraged to deliver services; particularly discretionary service provision such as food and drink.

Figure 5.5: Amenity Provision in a 7 Lochs Wetlands Park



5.2.1 Basic Needs – Parking, Seating, Shelter, Bins, Toilets, Security

It will be difficult and indeed unnecessary for any Trust to manage the full range of amenity provision across the Park. There will be a need for the Trust or volunteer group that is set up to manage some minor activity further in to the interior of Park – either alone or in partnership with bodies mentioned above. This might include things like litter gathering, clean ups and small restoration jobs.

Overall however, any funding applications should be co-ordinated with partners with a view to including basic amenity upgrades.

5.2.2 Basic Wants – Orientation, Interpretation, Play Areas, Built and Landscape Features, Cycle/Walking Routes

Again, much of this will be managed by partner agencies, but there is a clear need to incorporate Wetlands orientation and interpretation as much as possible.

Sustrans – links to wider (National?) routes for walking / cycling

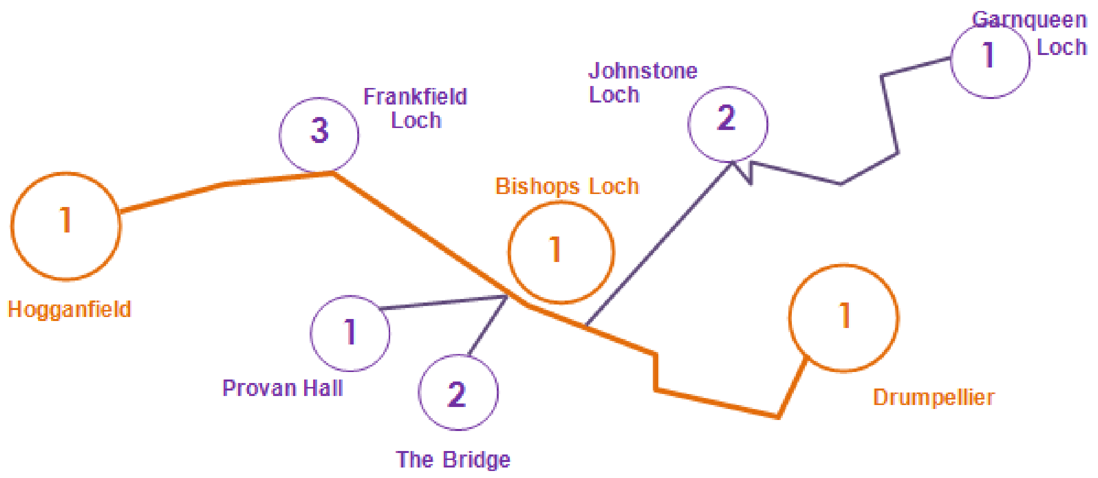
Ramblers - link to Commonwealth Legacy 'medal routes'.

5.2.3 Discretionary Wants – Visitor Centres, Food and Drink

The Masterplan envisages seven gateway sites, most with upgraded or new visitor centre facilities. Our view is that most of these may be built independently of the Wetlands project, so that the project should be focused on which need to be developed specifically as fully tagged Wetlands gateways. The illustration in Figure 6.4 below demonstrates where we believe people are most likely to arrive as potential Wetlands visitors. This is a function of both existing access provision and the Masterplan vision to create a principal route through the Park. Thus, given that there will be limited resources for actual physical development, we feel that amenity development that targets the discretionary wants of visitors should be created at these major arrival nodes (indicate as number 1 in the figure below).

As these points, the level of access and use is such that discretionary spending will in all likelihood be concentrated here. Therefore, the development of food and drink, retailing and activity provision should be particularly visible at these points. Although it may be notionally attractive to have such facilities located within the interior of the Park, financial viability would be highly questionable. This is primarily because visitor activity will always be concentrated at the cluster points, even though the aspiration is to optimise visitor flow across the Park. There may be the opportunity to deliver some seasonal food and drink provision via mobile concessions during the summer season.

Figure 5.6: Prioritising Amenity Development



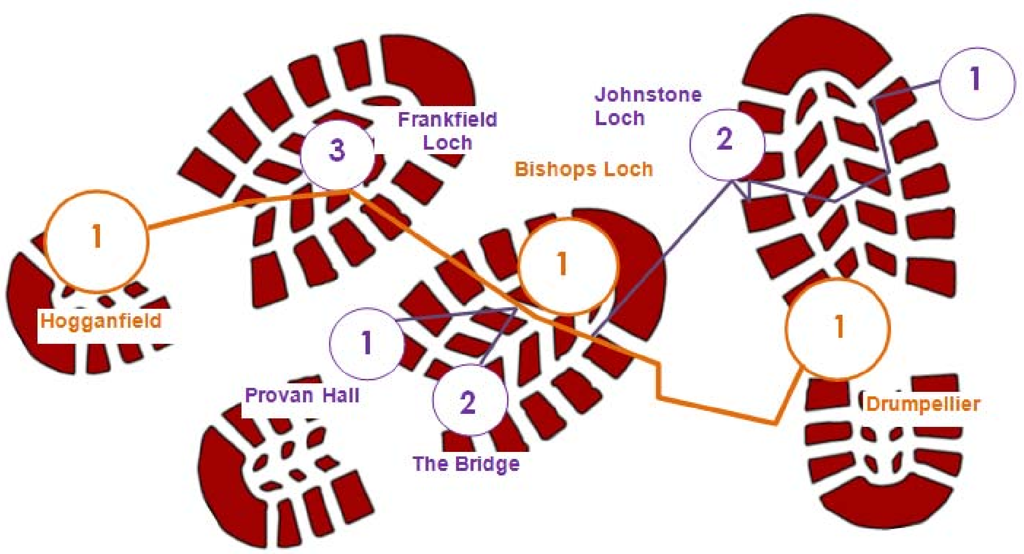
5.2.4 Creating Local Clusters

If the initial focus for visitor development is 'local', an agreed key focus of recreation strategy is to encourage people to explore beyond the immediate vicinity but within an identifiable local area. Examples of this could include:

- From Hogganfield into Cardowan Moss/Frankfield Loch
- From Provan Hall and The Bridge to Bishop's Loch and Gartloch Pools
- From Drumpellier to Johnston Loch and Garnqueen Loch
- From Drumpellier into Commonhead Moss/Bishop Loch
- From Garnqueen Loch to Johnston Loch
- From Lochwood to Bishop Loch reedbeds

This will work alongside the 'Making Connections' aspiration - which will create the spine for overall access across the Park – by providing manageable 'chunks' of leisure opportunity for local communities. This will help with creating local buy-in more effectively, as individual communities will identify strongly with what is immediately around them but less so with a amenities at a distance. For example, most residents around Hogganfield will know little if anything about issues at Drumpellier; and vice versa. Also, if initial key amenity developments are focused at Drumpellier, Hogganfield and Provan Hall, then each of these three clusters will have identifiable progress with which to encourage community buy-in.

Figure 5.7: Creating Local Leisure Clusters



5.2.5 Presenting What's Already There

In linking up amenities within local clusters, existing facilities need to be made more visible and, where appropriate, improved. Each loch area has a number of amenities that collectively will be presented to local users through interpretation and orientation, while also emphasising the leisure opportunities in the wider park.

5.2.6 Capacity Concerns at Gateway Sites

Feedback from discussions to date have raised some concerns regarding the existing seasonal capacity at gateway sites; and that key amenity development at these sites may exacerbate any problems that are currently an issue. The main issue is at Drumpellier, where car parking can be stretched during the summer when there is a combination of fine weather and more activities available. This leads to some visitors having to park on Townhead Road, which is a busy access route for cars and lorries. Nonetheless, there is some space to extend parking facilities at Drumpellier, while this strategy is also advocating use of transport alternatives (train, bus, cycle routes) and recommending initiatives that may encourage this.

It is also a key tenet of the strategy that we will not be targeting significantly greater use of key gateways; rather, we will be encouraging existing users to either disperse from these locations when they arrive or directing them to lesser used sites from which to start their visit.

5.3. Key Development 3: Park Interior Populating the Visitor Journey with 'Must See' Attractions

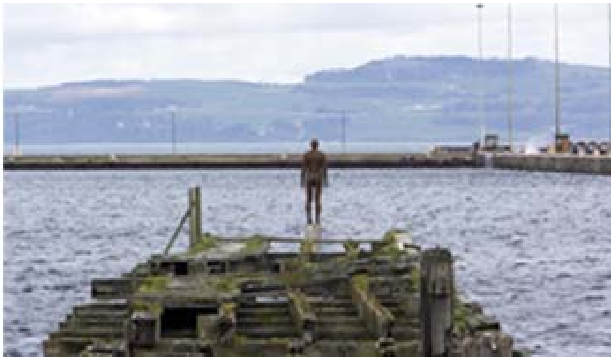
The Phase 1 route development will also provide for creation of some built attractions that incorporate the following:

- Must see 'attractions' that encourage wider exploration away from gateway sites. This needs to be a mix of things to see and things to do that 'punctuate' main access routes and send visitors 'off piste' on to lesser used paths and sites of interest;
- Build on partner activity (FCS, SNH, RSPB, local authorities) to provide themed 'challenges' or 'tick lists' that encourage wider exploration people to explore new areas.
  - SNH 'Get into nature' campaign
  - FCS Forest Education Initiative
- Combine the natural and urban environments; using juxtaposition and contrast to emphasise the features of both;

  Sculptures (including built, landscaped and loch-based) and installations that visitors can interact with (sit on, climb, walk on, etc.) rather than simply view as art; local community design input (schools, colleges, social engagement groups, etc.) as well artists. As an urban park, we should not be afraid to populate the park with built structures that create this sense of place. The examples below in Yorkshire (LEADER/local authority funded) and Edinburgh are great examples of populating trails with engaging features;

Figure 5.8: Built and landscaped sculptures along Wolds Way, East Yorkshire

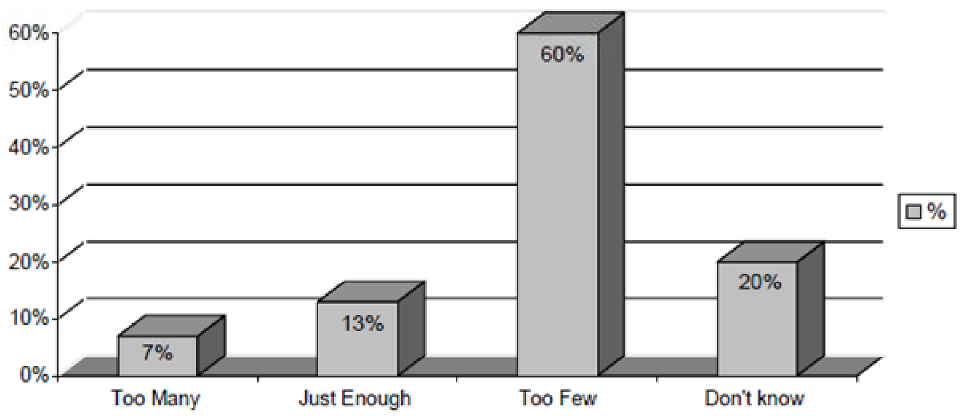
Figure 5.9: Antony Gormley sculptures, along Water of Leith, Edinburgh



- Some provision should remain at close proximity to gateway centres, but we should not apologise for making people travel further to access other activities; the Park has a role in healthy living and education, that can be met by making people walk further
- Changing features – facilities and spaces should be able to be adapted for different times of the year and different user groups
- Web cams - in co-ordination with key stakeholders like RSPB and FCS, there is the potential to locate web cam equipment at secure sites that could be transmitted through various media; including online via Wetlands web site and as loops/live streams in visitor centres. This would be particularly effective in bringing bird, animal and sea life to the attention of the residents. A mixture of live and recorded excerpts could be used that show the Park in its best light.
- Events are another opportunity to encourage wider access. Fun runs / family cycles etc. Is there an opportunity for the Wetland Park to be the 'home' of a regular 'city wide' event? The Wetlands will commit to supporting local events within it, with the purpose of raising its profile and strengthening the brand image. An events listing from partners and the Wetlands Trust's own activity will be collated regularly to help project an image of dynamism. Targeted social and leisure events – e.g. farmers markets, children's parties, etc. As the Park develops its connections, there will be increasing opportunities to host Park-wide events that use the routes for major cycling or running events. One could envisage for example large events such as:
    - 7 Lochs Marathon or ½ Marathon
    - 5k and 10k runs in support of charitable causes
    - Similarly, competitive and charitable cycling events

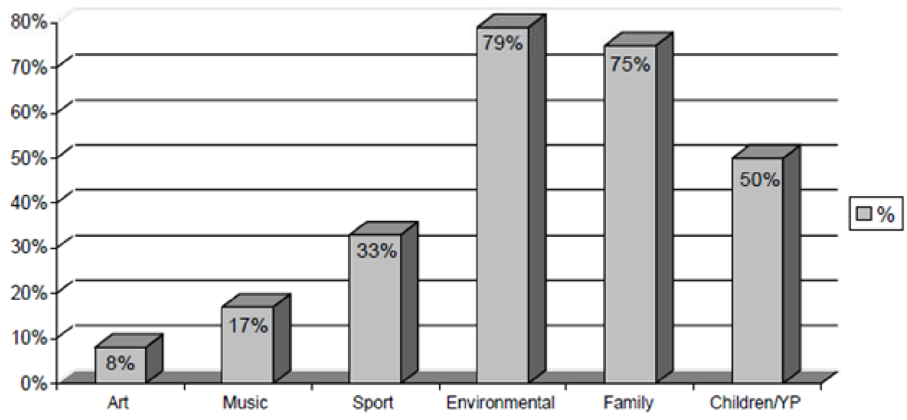
As shown below, the latent demand for events is evident from Hogganfield Park visitor survey, with nearly two out of three visitors indicating that there are too few events at present. The great majority of people would also like these events to be family oriented with environmental themes being the most popular.

Figure 5.10: Hogganfield Park Visitors' View on Event Provision



Source: Hogganfield Park and Local Nature Reserve Management Plan 2011-2016

Figure 5.11: Hogganfield Park Visitors' Preferred Types of Future Events

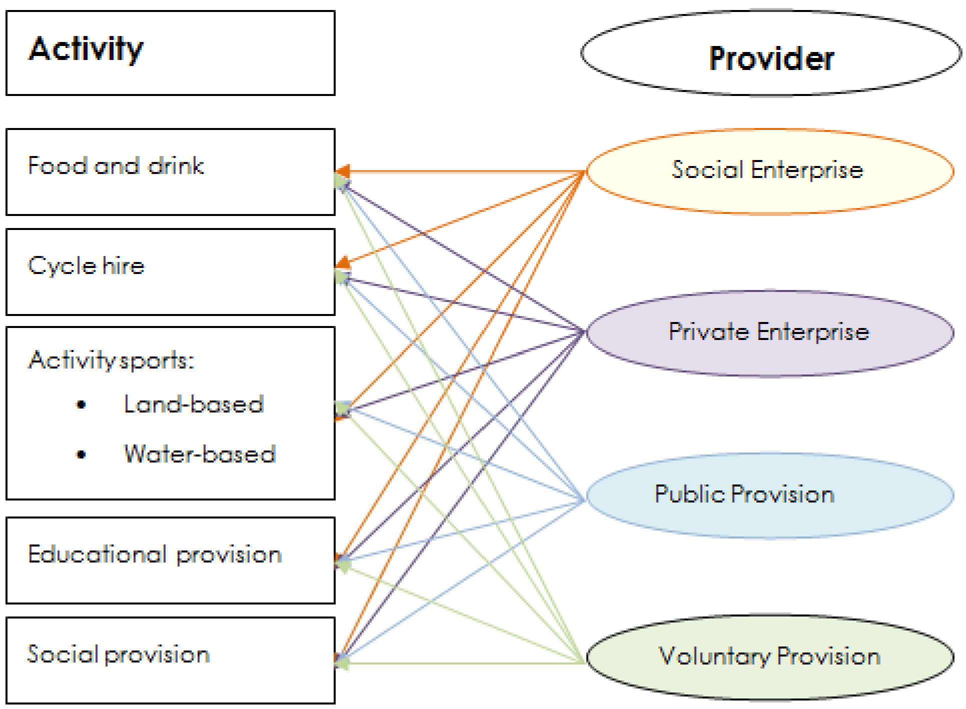


Source: Hogganfield Park and Local Nature Reserve Management Plan 2011-2016

5.4. Key Development 4: Creating a Basis for Business Development

It is likely that activity provision overall will be small scale, so that the number of businesses that the Park would be able to provide a profitable opportunity for would also be small. Nonetheless, the potential is there for local enterprises to take advantage of these opportunities so that maximum economic impact is achieved. Social enterprises should be encouraged as much as possible to take up this provision as this will help optimise both economic and social impact.

Figure 5.12: Activities and Providers



5.4.1 Food and Drink

- Food and drink offers have great potential, but this needs to go beyond typical West of Scotland fare.
    - ‘Destination’ outlets that are recognised as the place to go for particular food experiences
    - Changing menus
    - Concession outlets selling snacks targeting the impulse buys or casual purchases such as hot & cold drinks, snacks, newspaper vending
    - The plan for a Crannog Café on Lochend Loch in Drumpellier is questionable; access issues for waste disposal, potential for litter and food to drop into the loch and capacity management probably make this development unviable

Figure 5.13: Artist Impression of a Crannog Café

    - Tied into visitor journey to maximise opportunities – where people are likely to stop to rest, view activity or at outstanding viewpoints
    - Secure picnic areas – the Masterplan vision for the provision of some seating for picnics at location throughout the Park. The picnic experience could be enhanced however by providing secured access to sections of the lochs for paying groups. These areas could be screened to provide a sense of exclusivity that many groups would be willing to pay a fee for. Features would include:
- Day and half day rates
- Deposit/signed agreement regarding behaviour, breakages, etc.
- Some basic facilities would be provided
    - BBQ pits
    - Bins

Figure 5.14: Artist Impression of Seating and Shelter

Regarding visitor centre management, our own view is that any new build visitor centre function – including with interpretation and orientation responsibility – should be given over to the catering operator as well.

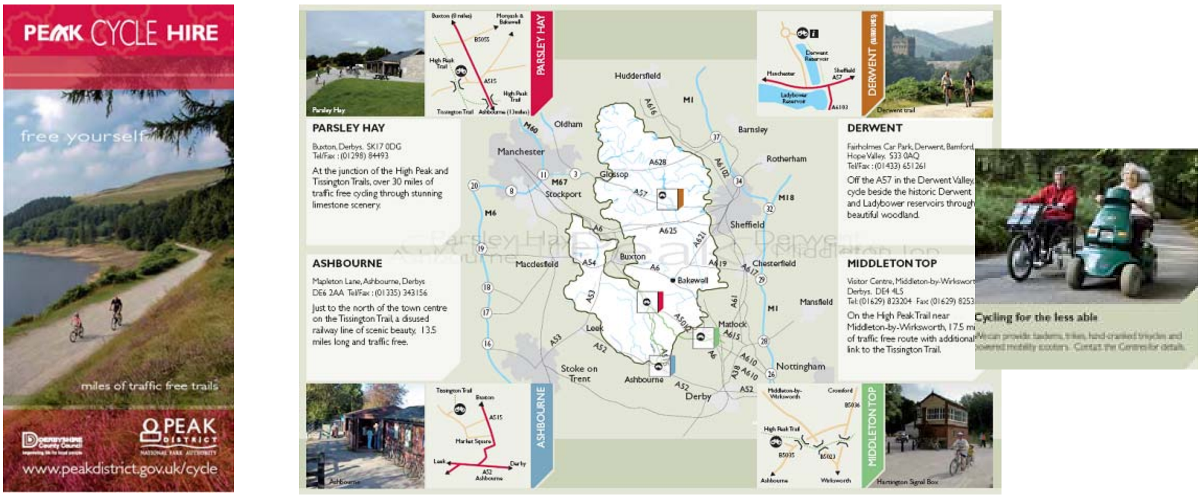
This is because the maintenance of the information facility would be better managed by an operator whose profit making potential relies on the whole visitor experience within the building. If the catering and information functions are divided, then this creates separate entities with different priorities. Our preference would be to attract a private or social enterprise operator rather than it be run by the local authority as our experience is that a private operator has more scope and motivation to develop the product. A social enterprise of course would have even greater connection with local community and be able to help build local ownership of not only the facility, but Hogganfield Park and the wider Wetlands.

5.4.2 Cycle Hire

There is a real business development opportunity for the private or social enterprise sector to create cycle hire facilities at one or a number of gateway sites or public transport hubs. Indeed, these facilities will be essential in helping manage any capacity issues that may arise from the increased demand that may ensue from a highly successful Wetlands Park. Suggestions have been made for locating these facilities at Drumpellier and/or Hogganfield, but this may in fact exacerbate car parking capacity problems as people arrive by car to access the cycles. Another option is to site the cycle hire at local train stations or nearby attractions. For example, to manage capacity at Drumpellier, the cycle hire could be located at the Blairhill Station or incorporated into the Summerlee Heritage Centre at Coatbridge Central Station.

An example is given below of the Peak District Cycle Hire Service, which is jointly funded by the Peak District National Park Authority, Derbyshire County Council and also marketed by the area's DMO; Visit Peak District. Around 30,000 cycles and disabled buggies are hired each year, although this covers the whole of the Peak District, which includes the UK's most visited National Park. Nonetheless, it is a good example of widening access and has been operating in form or another for around 30 years.

Figure 5.15: Peak Cycle Hire Service

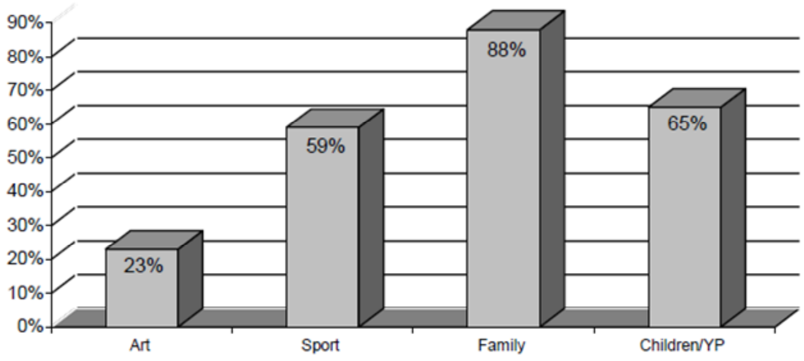


South West Community Cycles (SWCC) – in co-ordination with the Glasgow Building Preservation Trust, this social enterprise will be begin operating a cycle hire and cycle maintenance service out of Pollokshaws West Station in the south side of Glasgow. The Wetlands Park could be an opportunity for this enterprise to expand.

5.4.3 Activities Development

To build and maintain the integrity of the core attractions of wetland, lochs and woodland habitats will mean restricting the type and level of other visitor activity that can be accommodated in the Park. Much of this will need to be low impact activity, both in terms of physical and noise intrusion. Wetlands are viewed as tranquil settings offering space for contemplation and quiet activity. However, for the Park to be seen as a worthwhile destination across the visitor spectrum from specialist to family markets, we feel there needs to be some space for fun and – unavoidably – noisy activity. As shown below, family based activity was by far the most popular preferred theme of activity provision among those responding to the Hogganfield Park visitor survey.

Figure 5.16: Preferred Types of Future Activities at Hogganfield Park



Source: Hogganfield Park and Local Nature Reserve Management Plan 2011-2016

5.4.4 Lochs and Pools - Low Impact Activity

Figure 5.17: Artist Impression of Boating at Hogganfield Park

- Low impact activity sports have real potential as attractions and new business generators. There is some small provision of leisure boating at Drumpellier and Hogganfield, however this is pretty marginal. Drumpellier however does provide 'Sphereing' in the Spring/Summer season, which brings a bit of colour to water-based activity. As the image opposite indicates, the Masterplan envisages this as remaining as traditional boating, however it is felt that more activity such as sphereing and paddle boarding (see below), could help engage the family market.

Figure 5.18: Examples of Low Impact Water-Based Activities (left to right) – Stand-up Paddle Boarding, Corporate/teambuilding activities and Family Activities

Most water based activity will need to be confined to the existing zoned areas as other lochs have significant restrictions due official conservation designations.

There is also an issue with blue-green algae, which may restrict any immersive water-based activity. This alga if swallowed can make people unwell. Unfortunately, it is at its height in the summer. The extent to which this exists on the lochs needs to be confirmed.

5.4.5 Land-Based – Woodlands, Low Impact Activity

Land-based activity (climbing walls, 'Go-ape'-type zip/ropewalks) represents the most viable options for creating business development opportunities. Several benchmark operations for example illustrate innovative use of forest and woodland based activity, beyond existing agency supported educational provision. Examples include:

- Den building – families and our children's can learn to build or make things from woodlands material. This could either be managed or self-guided, in the latter case through purchase of booklets and other learning materials.
- Tree house village/play park in the interior of the park's woodlands

Figure 5.19: : Examples of Land-Based Woodland Activities (left to right) – Den Building, Tree House/Play Park

5.4.6 Open Space – Medium Activity

Corporate and general group markets could be targeted through provision of innovative outward bound activities. Hogganfield has an existing orienteering course, but there will opportunities to develop this further with more extensive facilities such as ropes course (see example below provided by a private company at the Cotswold Water Park).

Figure 5.20: Stairway to Heaven Aerial Teambuilding

5.5. Key Development 5- Making Connections 2 Visitor and Community Engagement

5.5.1 Volunteers

The entity that is set up to manage aspects of the Wetlands will only really be viable if a significant volunteer cohort can be created. Volunteers will hopefully be involved in the following activities:

- **Management activities**
  - Conservation and renovation work
  - Capacity building
  - Litter and clean ups
- **Operational activity**
  - Manning sites (visitor centres,
  - Provisions of services (guided walks, talks, activities, etc.)
- **Marketing and events**
  - Fundraising

  - o Events delivery
  - o Presentations

5.5.2 Using Locals to Develop Awareness

The local population's knowledge of the Wetlands is central to creating a sense of place among visitors.

- A regular column in local newspapers could be secured to update residents across the Park of new developments as they occur;
- Manage Wetlands Twitter, Facebook and Youtube content – activity on these portals is increasingly important in web development strategies, driving listings on search engines
- 'Adopt a loch' or 'adopt a tree' programme that plays on people's sense of community. This could help cement continuous links with visitors who could be regularly informed via the web site of a tree's progress
- Create an early spring event around late March –early April celebrating new growth, to address lengthening the season
- Exploring evening and indoor community led events that the Wetlands can co-ordinate with partners. For example, Forestry Commission Scotland is exploring development of forest tourism in a number of ways with partners in Scotland, some of which might be appropriate for the Wetlands

5.5.3 Working with VisitLanarkshire and Glasgow Marketing Bureau

These local DMOs market a range of experiences for potential visitors.

- Become the prime wildlife and environment brand for VisitLanarkshire and GMB to work with;
- SOI members to become involved in project groups developed by VisitLanarkshire/GMB. The DMOs create task groups and workshops from time to time to develop a particular aspect of the tourism offer. It is important that the Wetlands members get involved in these groups so that the Wetlands feature in strategic discussions;
- Familiarisation trips for VisitLanarkshire/GMB staff, board members and TIC staff.

5.5.4 Providing an Interactive Map

In co-ordination with the development of new orientation and 'experience leaflets, an interactive map based on brochure material will allow potential visitors to find information by clicking on map symbols themed around woodland features, wildlife, walking/cycling routes, visitor attractions and other key tourism features as appropriate. This will help present a joined-up information suite across hard copy and web-based material.

5.5.5 Offer Bank

A special offer bank could be created on a visitor facing website to encourage co-operative marketing and cross-selling of services. The SOI, in co-ordination the ATA, would regularly contact tourism businesses in order to list their offers prominently on the website under categorised headings such as 'Short-Breaks', 'Accommodation', 'Activities', 'Tours', and 'Events'. The SOI would not take responsibility for the delivery of these offers and this will be stated clearly on the web page. Nevertheless, it would add to the idea of a dynamic area where new opportunities for a visit are being provided.

5.5.6 Sponsorship

Sponsorship will be a key source of support for the Park. Its sheer size will perhaps have the potential to attract sponsorship of sites or parts of cycling/walking routes. Outdoor equipment and clothing companies, for example, may see this as an ideal partnership opportunity. Local companies , but with national profiles and innovative marketing exposure, such as Barr (Irn Bru, etc.), Greggs, Tiso and whisky companies should be targeted.

Figure 5.21: Examples of Sponsored Activities: JCB-sponsored Junior Drivers Course at Trentham Gardens, Stoke and Velvet Tissues Sponsored Playpark at Kew Gardens, London

Naming and Themed Trails

Sponsors will of course want to generate their own marketing collateral, so that offering to name routes or features in the park after companies or their products might encourage take up.

6. Action Plan

KEY DEVELOPMENT 1: MAKING CONNECTIONS (1): ADDRESSING ACCESS AND SENSE OF PLACE (YEAR 1)

Development Objective	Development Required	Responsibility*	Timescale
	Route Development		
To create a main walking and cycling route connecting major gateway sites	1. Confirm preferred route that maximises visibility and minimises development costs	GCVGN/Wetland Trust; GCC; NLC; Landowners; Sustrans; FCS, SNH, RSPB, community groups	Confirm for inclusion in HLF bid process
	2. Confirm secondary routes and their connection with main routes	GCVGN/Wetland Trust; GCC; NLC; Landowners; FCS, SNH, RSPB, community groups	Confirm for inclusion in HLF bid process
	3. Secure agreement with landowners (public, private) for route access	GGCVN; Wetland Trust; Landowners	Confirm for inclusion in HLF bid process
	Arrival Nodes		
Minimise car borne visitors	1. Work with rail and bus travel organisations to promote arrival by these means (ticketing, sponsorship, events)	GCVGN/Wetland Trust	Start discussions for indicative support of HLF bid; confirm formal arrangements post-bid
	2. Increase cycle parking and cycle hire facilities at gateways	GGCVN/Wetland Trust; NLC, GCC; local business input	Confirm for inclusion in HLF bid process
	3. Explore positioning cycle hire facilities at major rail stations (Blairhill, Coatbridge Central) or at Summerlee Heritage Museum	Wetland Trust/GGCVN	Confirm for inclusion in HLF bid process
Managing capacity and visitor dispersal	1. Explore car parking capacity development at gateways	GCVGN/Wetland Trust; GCC; NLC	Confirm capacity needs for inclusion in HLF bid process
	Creating a Sense of Place		
	2. Orientation and attractions development directed at Park interior	GCVGN/Wetland Trust; GCC; NLC; Landowners; FCS, SNH, RSPB, community groups	Confirm outline locations for inclusion in HLF bid process

***Key:**

GCVGN	Glasgow and Clyde Valley Green Network	FCS	Forestry Commission Scotland	Sustrans	National Sustainable Transport body
GCC	Glasgow City Council	RSPB	Royal Society for the Protection of Birds		

NLC	North Lanarkshire Council	SNH	Scottish Natural Heritage

KEY DEVELOPMENT 2: AMENITY DEVELOPMENT

Development Objective	Development Required	Responsibility*	Timescale
	Basic Needs		
Ensure basic needs services are in place	1. Work closely with local authorities and others responsible for upkeep of municipal facilities	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH	Ongoing; post-bid liaison
	2. Undertake regular clean-up and restoration events in co-ordination with partners	GCVGN/Wetland Trust; volunteer groups; local community groups	Post-bid; primary stages of Park set-up and ongoing thereafter
	Basic and Discretionary Wants		
Improve amenities at gateway sites	1. Create a visitor centre site at Hogganfield Park gateway	GCVGN/Wetland Trust; GCC	Confirm for inclusion in HLF bid process
	2. Improve and extend facilities at Drumpellier	GCVGN/Wetland Trust; NLC	Confirm for inclusion in HLF bid process
	3. Support development of visitor centre at Provan Hall and work with this partner to create a primary gateway site here	Friends of Provan Hall/GBPT; GCVGN/Wetland Trust	Confirm for inclusion in HLF bid process
	4. Work with partners at other smaller gateway sites at Frankfield Loch, Johnstone Loch, Garnqueen Loch and The Bridge	All relevant partners	Confirm for inclusion in HLF bid process
	Creating Local Clusters		
Create local amenity clusters	1. Agree on local cluster geography	All relevant partners	Confirm for inclusion in HLF bid process
	2. Create physical links between sites within local cluster	All relevant partners	Confirm for inclusion in HLF bid process; Post-bid
	3. Improve and/or add to amenities with local cluster sites	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH	Post-bid; primary stages of Park set-up and ongoing thereafter
	4. Engage local communities in development and maintenance of local sites	GCVGN/Wetland Trust	Post-bid; primary stages of Park set-up and ongoing thereafter
	5. Promote activity at these clusters via orientation, marketing, events and education	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH	Post-bid; ongoing

***Key:**

GCVGN	Glasgow and Clyde Valley Green Network	FCS	Forestry Commission Scotland	Sustrans	National Sustainable Transport body
GCC	Glasgow City Council	RSPB	Royal Society for the Protection of Birds	GBPT	Glasgow Building Preservation Trust

NLC	North Lanarkshire Council	SNH	Scottish Natural Heritage

KEY DEVELOPMENT 3: PARK INTERIOR – POPULATING THE VISITOR JOURNEY WITH 'MUST SEE' ATTRACTIONS

Development Objective	Development Required	Responsibility*	Timescale
Create a network of built, landscaped and loch-based attractions	1. Site attractions at gateway and interior parts of the park	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH	Confirm for inclusion in HLF bid process
	2. Build viewing and recreation platforms for visitors	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH	Confirm for inclusion in HLF bid process
	3. Commission local and national creative companies/artists to design 'must see', multi-use structures	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH	Confirm for inclusion in HLF bid process
	4. Create flexible spaces and facilities	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH	Confirm for inclusion in HLF bid process
Create amenities that encourage wide use of the Park	1. Picnic /BBQ and other stop-off sites – create facilities that are worth visiting and enhance visitor experience and dwell time	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH	Confirm for inclusion in HLF bid process
	2. Cycle parking to allow visitors to secure their bikes	GCVGN/Wetland Trust; GCC; NLC; Sustrans	

***Key:**

GCVGN	Glasgow and Clyde Valley Green Network	FCS	Forestry Commission Scotland	Sustrans	National Sustainable Transport body
GCC	Glasgow City Council	RSPB	Royal Society for the Protection of Birds		

NLC	North Lanarkshire Council	SNH	Scottish Natural Heritage

KEY DEVELOPMENT 4: CREATING A BASIS FOR BUSINESS DEVELOPMENT

Development Objective	Development Required	Responsibility*	Timescale
	Food and Drink, Cycle Hire, Activities Development, Lochs and Pools and Woodlands Low Impact Activities, Open Space Medium Activity		
Creating opportunities for businesses to utilise Park	1. Consultation with local businesses to explore opportunities; develop prospectus for distribution	GCVGN/Wetland Trust	Commence for inclusion in HLF bid; Post-bid; primary stages of Park set-up and ongoing thereafter
	2. Facilities development – visitor centres, food and drink, activity space and access	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH; local private and social enterprises	Commence for inclusion in HLF bid; Post-bid; primary stages of Park set-up and ongoing thereafter
	3. Co-ordination with partner activities – liaise with public and voluntary partners to avoid overlap of activity	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH	Post-bid; regular and ongoing
	4. Encourage social enterprise companies to secure as much of development opportunities as possible	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH	Commence for inclusion in HLF bid;
	Business Engagement and Participation		
Encouraging input from businesses on the management and development of the Park	1. Co-opt business representatives onto Wetland Trust committee	GCVGN/Wetland Trust	Post-bid; regular and ongoing
	2. Co-ordinate branding, marketing, standards and information provision with constituent businesses	GCVGN/Wetland Trust; local enterprise working in the Park	Post-bid; regular and ongoing
	3. Encourage/explore sponsorship of one-off activities, events and promotions with businesses	GCVGN/Wetland Trust	Post-bid; regular and ongoing

***Key:**

GCVGN	Glasgow and Clyde Valley Green Network	FCS	Forestry Commission Scotland
GCC	Glasgow City Council	RSPB	Royal Society for the Protection of Birds

NLC	North Lanarkshire Council	SNH	Scottish Natural Heritage

KEY DEVELOPMENT 5: MAKING CONNECTIONS 2 – VISITOR AND COMMUNITY ENGAGEMENT

Development Objective	Development Required	Responsibility*	Timescale
	Volunteers		
Secure a large volunteer cohort	1. Volunteer drive across local communities, to include community engagement events, 'adopt a loch'/'adopt a tree' drives, fundraising events	GCVGN/Wetland Trust	Commence for inclusion in HLF bid; Post-bid; primary stages of Park set-up and ongoing thereafter
	2. Seasonal community events, clear ups and restoration	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH; local groups	Post-bid; primary stages of Park set-up and ongoing thereafter
	3. Using locals to develop awareness – 'support the bid' activity through to ongoing activity	GCVGN/Wetland Trust; local community groups	Commence for inclusion in HLF bid; Post-bid; primary stages of Park set-up and ongoing thereafter
	Working with VisitLanarkshire and Glasgow Marketing Bureau		
Secure visibility through local and regional tourism bodies	1. Work with Glasgow Marketing Bureau, VisitLanarkshire, GCC, NLC, FCS, RSPB and SNH to secure position in their marketing activity and portals	GCVGN/Wetland Trust; GCC; NLC; FCS; SNH	Post-bid; regular and ongoing
	2. Send regular updates, news and events info	GCVGN/Wetland Trust	Post-bid; regular and ongoing
	Sponsorship		
Encouraging input from businesses on the management and development of the Park	3. Sponsorship drive to help fund main routes and amenities where appropriate; targeting local and national companies	GCVGN/Wetland Trust	Commence for inclusion in HLF bid; Post-bid; primary stages of Park set-up and ongoing thereafter

***Key:**

GCVGN	Glasgow and Clyde Valley Green Network	FCS	Forestry Commission Scotland
GCC	Glasgow City Council	RSPB	Royal Society for the Protection of Birds
NLC	North Lanarkshire Council	SNH	Scottish Natural Heritage

Appendix 1: Benchmarks

A number of benchmarks for the original Masterplan and vision explored primarily wetland and habitat creation and management, with additional exploration of how the visitor might engage with spaces created. There was little exploration of visitor development and business opportunity creation, or how the Park might be self-financing. Therefore the benchmarks used for this report are primarily targeted at bridging this gap in information; providing insights into potential commercial opportunities and marketing development.

Cotswold Water Park

Cotswold Water Park stretches for around 40 square miles across several local authority areas and contains some 140 lakes (many restored from disused quarries). The map overleaf illustrates the scale of the attraction. It forms part of the Upper Thames Wetland Corridor, while future restoration and development plans are expected to double the area of the Park over the next 20 years. These include restoring disused quarries as new wetland reserves. It was designated the Cotswold Water Park in 1967 by the four constituent local authorities (Gloucestershire County Council, Wiltshire County Council, Cotswold District Council and North Wiltshire District Council) and is managed by a Trust, the Cotswold Water Park Trust (CWPT). The details of governance are explored further in the following pages.

The Water Park is divided into three main parts.

- Western section – this is the largest section and comprises the majority of the lakes, the two country parks, four of the six nature reserves and most of the leisure activities
- Central section – this part of the park is adjacent to the main transport artery (A419) that links the M4 and M5 motorways. It houses the Park's Gateway Visitor Centre, as well as a number of lakes and one of the Park's five nature reserves
- Eastern section – this is the smallest section of the Park, but still includes around 30 lakes, and one nature reserve (Whelford Pools)

As the map overleaf shows, there are 14 main settlements within the Park with a total resident population of around 20,000, while the drive-time catchment is several million.

Visitor offer

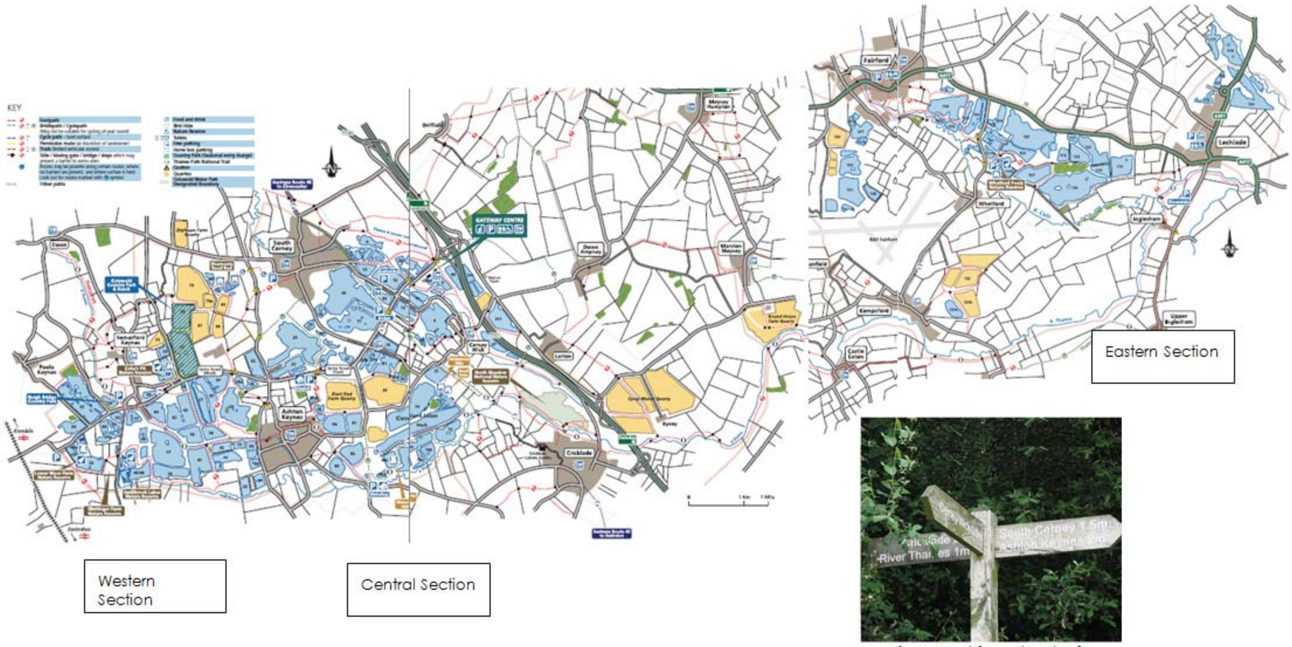
There is generally free access to the Water Park, with only the Cotswold Country Park and Beach and Butts Farm Rare Breeds and Shop charging an entry fee. Also, within the Water Park there are a multitude of outdoor activity pursuits managed by a number of private sector operators who obviously charge for their services.

The sheer scale of the Park along with historically divided ownership and responsibility is such that the visitor offer is somewhat fragmented. The range of attractions and activities are as below, illustrating the significant leisure opportunities available. Some specific examples are reviewed for each of the Western, Central and Eastern sections.

- Two country parks
    - Cotswold Country Park and Beach
    - Neigh Bridge Country Park
    -
- 140 lakes - 10 with SSSI status, 74 used as fishing lakes
- 150km of pathways, bridleways and cycleways, including the Thames Path National Trail and Sustrans Route 45
- Six Nature Reserves
    - Clattinger farm (Wiltshire Wildlife Trust)
    - Swillbrook Lakes (CWPT)
    - Coke's Pit (CWPT)
    - North Meadow (Natural England)
    - Whelford Pools (Gloucestershire Wildlife Trust)
    - Lower Moor Farm (CWPT)

- Events – guided walks, outdoor theatre, craft workshops, talks and lectures
- Land Based activity provision
  - Aerial Adventure
  - Cycle Hire
  - Golf
  - Paintballing
  - Sculpture Trail
  - Walking
  - Wilderness
- Water-based activity provision
  - Activities Centre
  - Angling
  - Canoeing/Kayaking
  - Diving
  - Sailing
  - Snorkelling
  - Swimming
  - Waterskiing
  - Windsurfing

Cotswold Water Park Map



Finger post for network of walkways and bridleways

Western Section

Cotswold Country Park and Beach

Cotswold Country Park and Beach (indicated as the two shaded lakes in the western section on the map above) is the primary visitor attraction within the Water Park. The Country Park is open all year, with access times seasonally adjusted (October-March 9am-5pm; April-September 9am-7pm and May-August 9am-9pm). An admission fee is charged per person as shown below. Previously, admission was charged only for cars, but demand particularly in the summer had been such that per person pricing was introduced to manage visitor numbers.

Month	Adult	Child
January	£2	£1
February	£2	£1
March	£2	£1
April	£3(Off Peak) £4(Peak Times)	£2
May	£3(Off Peak) £4(Peak Times)	£2
June	£4(Off Peak) £5(Peak Times)	£2
July	£4(Off Peak) £5(Peak Times)	£2
August	£5	£3
September	£4(Off Peak) £5(Peak Times)	£2
October	£2	£1
November	£2	£1
December	£2	£1

- Visitor Centre - this is operated by the Cotswold Water Park Trust, located at the entrance to the park. The Centre houses a small shop, the Trust's offices and meeting space. The Gift Shop is stocked with a range of beach and water-based pastime items, illustrating the potential of this attraction feature.

  The Café Culture coffee shop provides a range of snack food

  - Teas and Coffee from £1.50
  - Soup of the day with crusty bread - £3.50
  - Bacon and brie panini - £4.50
  - Tuna and cheddar panini - £4.50
  - Honey roast ham and wholegrain mustard sandwich - £3.50
  - Sweet pepper, mozzarella and pesto sandwich - £3.50
  - Chickpea and squash tagine with lemon couscous - £5.50
  - Beef and mushroom casserole with mashed potato - £6.50
  - Toasted teacake with jam and butter - £2.50
  - Cake of the week - £2.50

Stand-up Paddle Boarding

- Two lakes - the smaller, more northerly of these two lakes (Lake 31) is the main focus for managed activity; incorporating rowing boats, shuttle bikes, pedal boats and Katakanas (double hulled canoe) and Stand-up Paddle Boarding. These are rented out by a private concern, 'Go-By-Cycle', who also operate a cycle-hire business. The business has a lease contract with the Trust. Seasonal operation; April to October. Water Zorbing is also provided on a seasonal basis by another company Dynamic Pursuits.
- The larger lake (Lake 32) is used on a more casual basis, primarily for its beach and swimming potential. However, another private sector company - Water land Pursuits Activity Centre - provide outdoor and watersport pursuits (windsurfing, sailing, raftbuilding, kayaking, canoeing, archery, bushcraft and survival) for young people and other groups
- Aerial activity centre – another private company, 'Head-4-Heights', operates the aerial adventure centre. which is a private company specialising in aerial adventure. The site comprises high adventure activities (High Ropes Course) and team challenge events (Low Ropes Course). The centre is open most weekends and every day throughout the school summer, Easter and Half Term holidays.

Stairway to Heaven aerial

- BBQ sites for hire – there are seven purpose-built barbecue sites for hire across both lakes, costing £45-£55 per day

Central Section

Cotswold Water Park Gateway Centre

The Gateway Centre opened in 2004 and uses a number of sustainable energy sources, including a photo-voltaic roof, heating and cooling from embodied energy from the nearby lake of the lake and use of rainwater to flush the toilets.

As a gateway centre, it has a large car park. As well providing orientation and interpretation, the centre has a café and the Cotswold Outdoor shop chain has an outlet adjacent. A famous mammoth skull – one of only two ever found in England - forms a central part of interpretation.

Cotswold Water Park Hotel

Immediately adjacent to the Gateway Centre is the 4-star Cotswold Water Park Hotel, operated by the Four Pillars Hotel group who have 6 hotels in the region. Opened in 2007, this is a large operation with 318 bedrooms, extensive conference and banqueting facilities, restaurants, spa services and self-catering chalets.

Lake 11 – Waterskiing and Cable skiing

At Lake 11 there is a dedicated facility for traditional waterskiing and main attraction cable skiing. Cable skiing uses a power-driven overhead cable that pulls the water-skier or wake boarder in much the same way as a speedboat. The company WMSki provides this service at Lake 11 which is nearby to the Gateway Visitor Centre. The range of facilities and services are:

- Ladies morning
- Kids mornings
- WMSki Wake Academy
- Introductory courses
- Corporate and group events
- The Cable Café - fully licensed and provides a range of hot and cold food.

Cable skiing at Lake 11

Cleveland Lakes Interpretation Hut

Eastern Section

The Eastern Section of the Water Park is somewhat detached from the rest of the Water Park, with the only active link being the Thames Path National Trail route (see map on p. X). This is section of the Park is somewhat of an antidote to the significant development and activity of the other parts of the Park, with the main attraction being Whelford Pools Nature Reserve (operated by the Gloucestershire Wildlife Trust). The thirty or so collection of lakes here are bounded each side by the small towns of Fairford (west) and Lechlade (east).

Performance

The Cotswold Water Park Trust indicates that it receives around 500,000 visits every year, but we believe this is a significant underestimate of visitor numbers. The Cotswold Country Park and Beach itself receives around 200-300,000 visitors depending the year's weather, while the breadth of activity operators and catering operations is such that there would need to significantly more demand to allow these businesses to operate profitably.

Governance and Organisation

Since March 2011, the Water Park has been managed the Cotswold Water Park Trust; a registered charity. Before this the Park was administered by the Cotswold Water Park Society and the Trust works to the same objectives of the Society. The Trust is governed by a Board of Trustees made up at present of local business owners, residents, voluntary organisations, the National Trust, local authorities and the local urban regeneration company. Its overall objective is stated as to "achieve a balance between development, recreation and nature conservation within the Cotswold Water Park", while its objectives are stated as:

- Developing planning policies and management practises to sustain the current nature conservation interest of the CWP;
- Achieving greater provision of appropriate public access for all to sites and facilities in the CWP;
- Promotion of a greater understanding of the area by assisting with the creation of a cohesive image and providing an educational resource;
- Conserve and improve the landscape through appropriate restoration of mineral workings;
- Encourage, promote and implement the creation, conservation and management of wildlife habitat;

- Work with local communities, businesses and other voluntary organisations to improve the environment of the CWP;

The Trust works in a unique partnership with the Cotswold Water Park Joint Committee (Cotswold District Council, North Wiltshire District Council, Gloucestershire County Council and Wiltshire County Council). The Joint Committee controls large scale strategic and planning issues, whilst the Trust is dedicated to fund raising, establishing partnerships with other bodies and practical management on the ground. This includes running the Water Park Ranger Service and Country Parks. The Trust also works with Water Park businesses (many of which are privately owned) and voluntary organisations such as the Wildlife Trusts to market the Park.

CWPT Income and Expenditure Account to 31st March 2010

Income and Expenditure Account

Statement of Financial Activities for the period ended 31st March 2010

	Notes	Unrestricted funds £	Restricted funds £	31.3.10 Total funds £	31.7.09 Total funds £
INCOMING RESOURCES					
Incoming resources from generated funds					
Voluntary income			-		689
Investment income	2		-		79
Incoming resources from charitable activities					
Environmental		-	218,741	218,741	360,849
Other incoming resources		-	85	85	452
Total incoming resources			218,826	218,826	362,069
RESOURCES EXPENDED					
Costs of generating funds					
Costs of generating voluntary income		-	986	986	549
Charitable activities					
Environmental			186,055	186,055	400,421
Governance			400	400	0
Total resources expended			187,441	187,441	400,967
NET INCOME/EXPENDITURE					
RESOURCES			31,385	31,385	(38,898)
RECONCILIATION OF FUNDS					
Total funds brought forward			2,603	2,603	41,501
TOTAL FUNDS CARRIED FORWARD			33,988	33,988	2,603

BeWILDerwood, Norfolk Broads

BeWILDerwood, on the Norfolk Broads, is a forest-based attraction of some 50 acres of woodland and marshland. It is a relatively new operation, having only started in summer 2007. The concept is based on books by Tom Blofeld (A Boggle at BeWILDerwood), who is also the owner. This storybook setting is delivered through a combination of physical design, character role-playing staff and the activities programme. The estimated development cost was around £2 million.

We believe this is a good benchmark from the perspective of targeting both the young family market and the grand leisure market reviewed earlier in the market analysis section of the report.

Visitor Offer

It is a paid attraction with additional secondary spend streams including hosted activities, catering, retail and events.

There are a range of free activities in the park (see images overleaf) that are designed to accommodate both children and adults, including:

- Boat ride into and out of the forest
- A mini zipwire, ropewalks and swings complex
- Maze
- Slides
- Treehouses
- Den building from forest material
- Arts and crafts making
- Walking routes
- Activity challenges – children are given maps and challenge sheets to complete which solving riddles and finding 'boggletts' (chocolate coins) around the woods

There are some paid for activities, such as face-painting and craft-making, but generally most activities are free.

A cycle hire company is located at the entrance to Bewilderwood, but the cycles cannot be taken into the attraction. Rather, there are a range of cycle routes within the vicinity of Bewilderwood that travel across the parts of the Norfolk Boards. Nonetheless, it is an additional feature and both the cycle hire company and Bewilderwood undertake reciprocal marketing of each other's services.

The attraction has won a number of awards since it opened, across visitor attraction and tourism related themes as well as general marketing and branding recognition:

- Silver winner - Best Large Attraction - Enjoy England Awards for Excellence 2010
- Winner – Best Large Attraction in the East of England – Enjoy England Regional Awards for Excellence 2009
- Winner - Grand Prix Award for Branding - DBA (Design Business Association) (Purple Circle Design Ltd) 2009
- 2009 saw BeWILDerwood pick up the theme park industry's equivalent of an Oscar by being awarded the internationally acclaimed THEA – by the Themed Entertainment Association (TEA). 2009 winners also include Disney and the 2008 Beijing Olympic Opening Ceremony
- BeWILDerwood was selected by The Observer as being "one of the fifty most fabulous things to do in the world"!

- UK Tourism Award – The British Guild of Travel Writers 2008

Activities


Den Building


Storytelling sessions, up to three times a day during peak times

Branded interpretation boards

Events

BeWILDerwood delivers a numbers of events throughout the year that target both return visitors - primarily from the local catchment areas – and visiting tourist groups by providing a call to action (date limited timing).

Catering and Retail

There are three catering outlets in the attraction,

- Munch Bar – this is the main food outlet, serving larger meals such as burgers and bangers; all emphasised as being homemade and local sourced
- Snack Shack – selling mainly small items such as ice-creams, soft drinks and snacks
- Cosy Cabin – similar to the Snack Shack offering

None of the outlets have indoor seating, so they are in effect take-away operations. There is however a range of outside seating.

The food offering was above average quality and promotes its local produce and organic credentials.

- Sandwiches from around £2.50
- Jacket potato £3.50 (plus fillings from £1-£2.50)
- Burgers from £4
- Giant sausage in a baguette with the fried onions £3.50
- Chocolate muffin - £2.50
- Cappuccino - £2.20
- Local ice cream
- Themed 'Swampy Lunchbox'; cheese or ham sandwich, orange or apple juice, organic yoghurt tube, apple, colouring page and pencils – £3.25.

In promoting its healthy, outdoor theme, items such as chips and other deep fried foods are not sold at any of the outlets.

Retail is a mixture of attraction/books themes, but also a range of generic pocket-money items from 50p to £5, such as pencils, badges (75p), pens (£1.25), postcard costs (from 50p) and a key rings (£2.50).

Staffing

The attraction prides itself on high interaction between staff and visitors, with many employees role-playing as characters from the books. Most staff are seasonal (around 100) but there is a cohort of 18 full-time employees.

Performance

Bewilderwood receives around 160,000 visitors per year since opening, generating annual turnover of around £2m in 2010 and £2.24m in 2011.

Future Developments

Plans have been approved for second attraction on the other side of the country, within the National Trust's Tatton Park in Cheshire. This is expected to generate around 200,000 visitors and increase the number of visitors to Tatton Park to more than 1 million.

Trentham Estate, Stoke-on-Trent

On the outskirts of Stoke-on-Trent, Trentham Estate is a mixed-use leisure attraction on the former estate of the 4th Duke of Sutherland. There is no historic house, but the gardens, park, woodland and lake have been retained; and form the landscape on which the various leisure activities are undertaken. It has been restored from derelict buildings and polluted land. We benchmarked this attraction recently for Forestry Commission Scotland for a separate project, but believe it has even more relevance to the Wetlands concept.

The attraction covers some 725 acres with several access points. It is surrounded by major population centres in Staffordshire and the East Midlands and lies only 2.5 miles from the M6 motorway.

The Estate is now owned by St Modwens, a property development company specialising in regeneration areas. Since acquiring it in 1996 they have developed it into one of the country's most visited paid attractions, with around 2.5 million visitors per annum. However, it took until 2003 – some 7 years - for the company to secure full planning consent for the comprehensive redevelopment of the site.

Aerial View Trentham Estate

Aerial View Trentham Estate illustrating location of the M6

Attraction Offer

The stated aim that guided the redevelopment of the Estate was to avoid noisy theme park-like attractions, by providing more "authentic experiences" based on using the natural features of the local environment. Most of the Estate's activities are charged, although there is free access to the surrounding woodland area (illustrated dark green in the map below) and shopping village (SV in the figure).

The key paid attractions are:

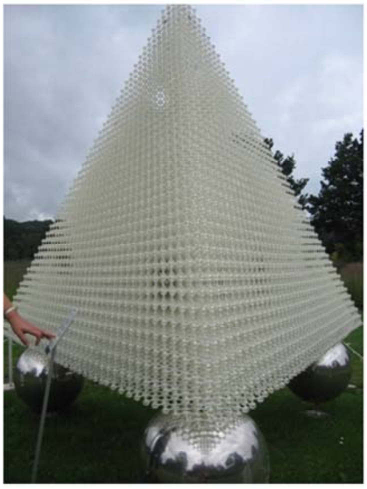
- Restored Italian Gardens and Lake
  - an extensive adventure play area including wellbeing 'Barfuss' barefoot walks, bushcraft, maze and JCB junior drivers course
  - Italian Garden Tearoom
  - 'Miss Elizabeth' passenger cruise boat (separately charged).
  - Boat hire (separately charged)
  - 'Trentham Fern' miniature railway (separately charged)
- 60 acre Monkey Forest - with colony of around 140 Barbary Macaque Apes. This element attracts around 250,000 visitors per annum.
- Aerial Extreme an adventure ropes course between the trees in the woodland area.

Orientation Map Trentham Gardens

Activities

TRADITIONAL GARDENS AND WOODLAND OFFER

INNOVATIVE ACTIVITIES AND INTERPRETATION



One of several exhibits showing alternative structures of carbon

Sound sculpture installations

Barfuss walk

JCB-sponsored Junior Drivers Course

Floral Labyrinth Maze

AERIAL EXTREME

MONKEY FOREST

Retail and Hospitality

- Shopping Village and Trentham Garden Centre – these are sited at the main entrance and accessed free of charge. The Shopping Village is fully let and has 58 individual shops, cafes and restaurants including many high street names. The retail space extends to around 67,500 sq. ft.
- A Premier Inn Hotel (119 bedrooms) – budget hotel accommodation on site

SHOPPING VILLAGE

11 food and drink outlets

Income Streams

There are a range of ticketing options, from the basic 'Gardens and Lake only' ticket through to joint-ticketing with the Monkey Forest and annual memberships. In addition to paid admission, the extent of further site elements such as the cruise boat, boat hire and miniature railway encourage additional spend. There are also a range of garden-related concessions such as plants and fruits and vegetable stalls located within the gardens. The pricing elements are detailed below:

Admission Prices – Trentham Estate

Gardens & Lake Only	
Single Adult	£7.25
Joint (2 Adults)	£13.50
Family (2 Adults & up to 3 Children)	£24.85
Family- One Adult (1 Adult & up to 3 Children)	£17.60
Child (5-15 years)	£5.70
Child (Under 5 years, max 3 per Adult)	Free
Senior Citizen	£6.20
Student (with valid Student card)	£6.20
Disabled Persons	£3.65
Companion of a disabled person	£3.65

Joint Monkey Forest & Ticket*	
Adult	£12.50
Child (5 - 14 years)	£9.00
Concession	£11.00
Disabled Person	£6.50
Companion to disabled person	£6.50

* includes one return visit any day in the year

Commercial Income Generation

All of the commercial attractions, retail and catering provision at Trentham are outsourced and let on sales-based leases with the exception of the Premier Inn Hotel. This is located on a leasehold site sold to the operating company. Due to commercial confidentiality, we do not have precise detail on these agreements, but typically a sales-based lease would involve a fixed annual fee plus a percentage of sales (normally 10-15%).

Further development is proposed and the overall planning consent includes a 67,500 sq. ft. extension to the Shopping Village and a Winery at the main entrance area. It also provides for the reconstruction of Trentham Hall (demolished 1911) overlooking the Gardens as a premium hotel. There is also planning consent for 75 holiday lodges to be located within the woodlands adjacent to the lake.

Access

The site has two entrances which ostensibly divide access between the core attraction (Gardens, Lake and Shopping Village) and the other headline attractions (Monkey Forest and Aerial Extreme). Thus all key attractions can be accessed via the main North Entrance, however, visitors only wanting to use the Monkey Forest and/or the Aerial Extreme facility are directed to the South Entrance.

Target Markets and Income

Key target markets are older people, families and younger children. This reflects the consumer profiles discussed in the earlier sections of this report.

Key Lessons

This is a highly commercial multi- faceted site with a large number of activity / attraction streams. Development has been organic over some years but has retained an ability to focus on current market demand and maximise appeal.

Mugdock Country Park, Glasgow

Mugdock has developed its visitor numbers from under 400,000 around 10 years ago to nearly 600,000 in 2010. The park has grown gradually, with small upgrades and additions occurring over the last 10 years.

- Countryside Ranger Service
  - Outdoor Activities – paid and free
- Corporate and Incentives Packages
- Room Hire (up to 54 capacity) with local community rates
- Shopping and Eating Out
  - Garden Centre/Mugdock Plantaria (franchise to Caulder Garden Centres)
  - Arts & Crafts Gallery/Shop
  - Gift Shop
  - Tearoom

- Theatre/Cinema and Café Bar
- Room Hire
- BBQ site hire
- Walking and cycling routes
- Fun and educational trails (and accompanying leaflets)
- Play area and adventure trail
- Archery
- Orienteering Packs
- Events programme (c. 200 activities and events)

Transition Extreme, Social Enterprise, Aberdeen

Although Transition Extreme offers a wholly indoor experience, its creation and operation as a successful social enterprise is instructive. Located near Aberdeen Beach, the facility opened in April 2007 and offers a range of extreme sports activities and facilities:

- indoor skate park
- climbing centre with three graded walls:
  - El Capitan – 12 –15 ropes – Major imposing feature wall - offering challenging, competition standard routes on major overhangs but also inspirational to the middle grade climbers
  - Devils Tower –10-14 Ropes. Multi user wall with themed fractured routes and varying profiles. Likely to be one of the most popular – quality climbing with easy to hard grades on all routes.
  - Wall 3 – Group/Instructional Wall – multi user wall – great for group instruction, juniors, beginners – or warming up or down as well as abseiling from the 8 metre station.
- A "2-on-2" basketball court,
- Café
- recreation areas
- band practice studios and gigs
- a major visitor centre
- 3 leading retailers in Tiso, Alpine Bikes and Boarderline (skateboard and snowboard shop).

Transition Extreme Location near Aberdeen Beach

Two of the climbing walls

As shown below, funding of the facility amounted to nearly £2 and three-quarter million and while it is registered Scottish charity, it is intended to make a profit.

Funding Sources for the Creation of Transition Extreme

Aberdeen City Council	£1,260,000
Bank of Scotland -loan finance	£ 500,000
Robertson - Trust	£ 200,000
Shell UK Limited	£ 100,000
Scottish Enterprise Grampian	£ 300,000
Fundraising events	£ 30,000
Sportscotland (Lottery)	£150,000
Apache North Sea	£ 45,000
The MacRobert Trust	£ 15,000
The Gannochy Trust	£ 15,000
Production Services Network	£ 25,000
First Group	£ 10,000
Aberdeen Safer Communities Trust	£ 3,000
Talisman Energy	£10,000
Stena Drilling	£5,000
NHS Grampian	£20,500
Total	**£ 2,688,500**

Source: Transition Extreme

Transition Extreme is a social enterprise targeted at assisting young people in Aberdeenshire to

"*make the difficult transition from childhood to adulthood (avoiding the pitfalls of the many others forms of "negative recreation") and thereafter maximising their potential in society*".

Key aims are:

- Transition Extreme aims to increase participation in sport from childhood to adulthood – engaging those not attracted to conventional sports.
- We provide a diversionary facility which supports initiatives to reduce crime, substance abuse and antisocial behaviour.
- Socially Responsible Business of the Year 2008
- Come to Aberdeen Trophy 2007
- Grampian Business Awards, Business Success Under 3 Years 2008
- Ernst and Young Scotland Social Entrepreneur of the Year 2008
- COSLA Gold Award for Excellence in Local Democracy and Community Planning 2010

The operation had an initial target of 160,000 visitors per year, but actual numbers are closer to 90-100,000.

It employs around 30 staff, most of who work on a part-time basis.

Water of Leith Conservation Trust

The Water Leith Conservation Trust is a good example of a voluntary organisation that has been created to manage a resource that extends over a geographical area; and so has some very good stakeholder engagement and fundraising lessons for the Wetland.

The Attraction

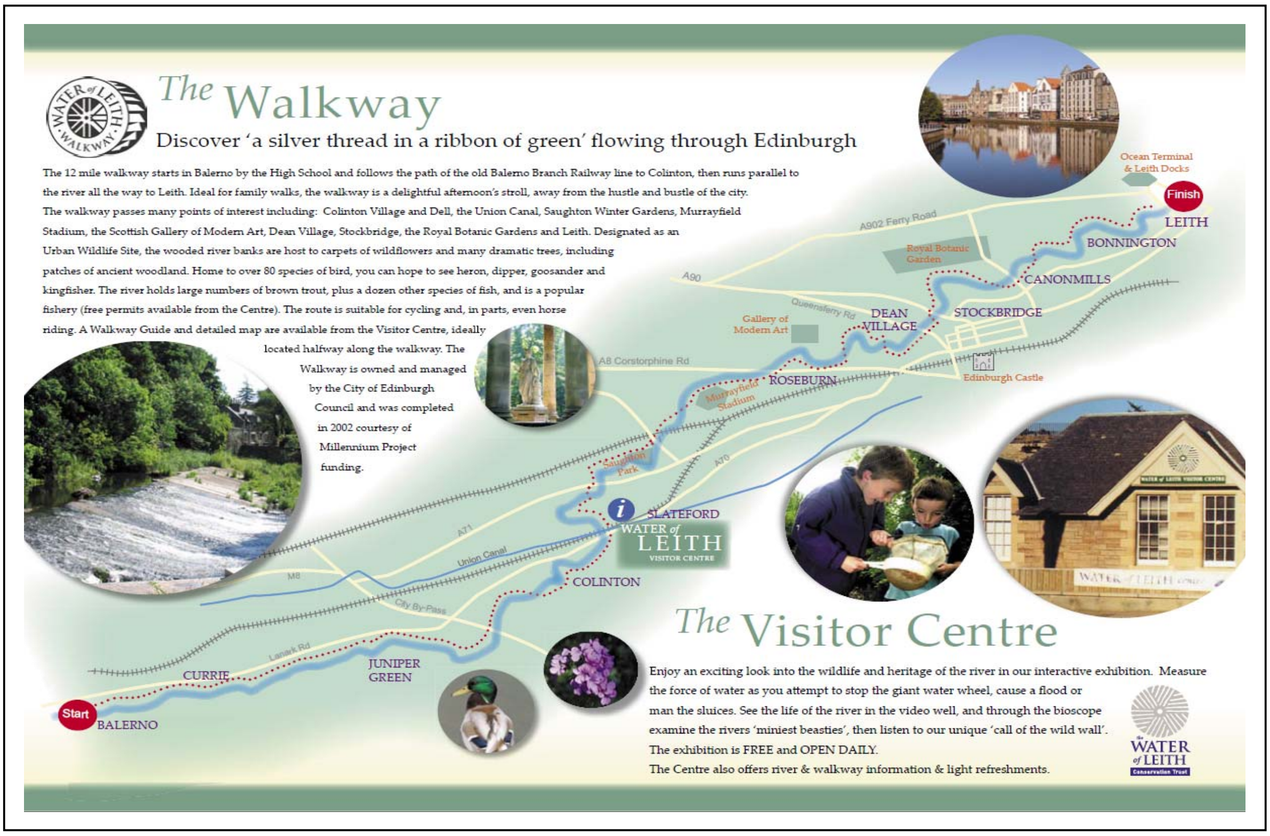
The Water of Leith is a river that runs from Balerno to the west of Edinburgh down to Leith where it flows in to the Firth of Forth. The main attractions

- The River
- Visitor centre
- Walkway past some Edinburgh's key cultural sites and attractions
- Wildlife
- Fishing
- Events

It passes a number of the city's main attractions and heritage areas including the Union Canal, Saughton Winter Gardens, Murrayfield Stadium, the Scottish Gallery of Modern Art, Dean Village, Stockbridge, the Royal Botanic Gardens and Leith itself. It is designated as an Urban Wildlife Site and is home to over 80 species of bird including heron, dipper, goosander and kingfisher.

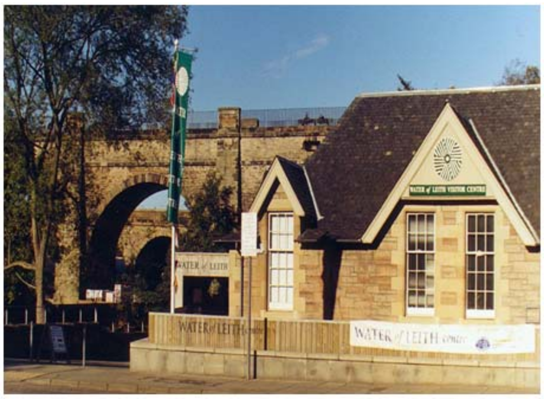
The river holds large numbers of brown trout, plus a dozen other species of fish, and is a popular fishery . The route is a major local walking route and is also suitable for cycling and, in parts, horse riding. The Walkway itself is owned and managed by the City of Edinburgh Council and was completed in 2002 courtesy of Millennium Project funding.

In 2010, 6 life-size sculptures by the internationally renowned artist Antony Gormley were installed at points along the river; bringing a significant addition to the Water of Leith as a broadly appealing attraction.



Visitor Centre

The visitor centre is located at Slateford, roughly midway along the walkway. It houses an interactive exhibition based on the river's wildlife and heritage and is very much designed with children in mind.



The visitor centre also has a small cafe selling tea, coffee and snacks, and there is also a gift shop selling books, maps and souvenir items. The centre is also used for educational and group visits, as well as children's birthday parties.

The Trust

The Water of Leith Conservation Trust was established in 1988 and is a registered charity (No: SC000015) and company limited by guarantee (114294).

Its stated mission is *to conserve and enhance the Water of Leith as a haven for wildlife and an educational and recreational resource for all.*

The Trust's key aims are:

- To raise awareness of the river as Edinburgh's key Environmental asset
- To provide a quality Lifelong Learning Service - offering environmental education teaching services, group visits, advice and information for all age groups
- To encourage the protection and enhancement of biodiversity along the river
- To promote the conservation of the Water of Leith, by fostering practical action
- To promote the Water of Leith Walkway for the enjoyment of the public
- To work in partnership with landowners and official bodies responsible for the river to promote the effective management of the river valley

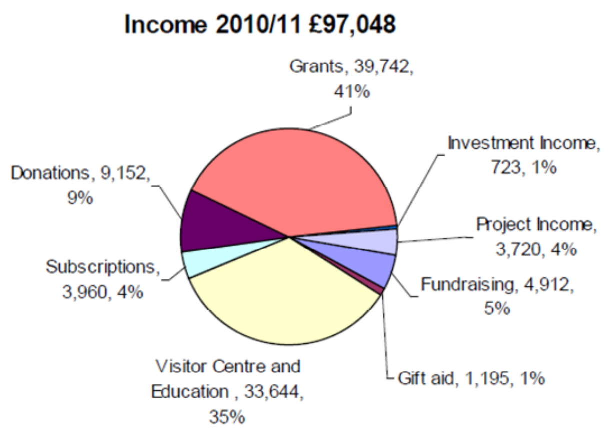
The Water of Leith Conservation Trust Objectives:

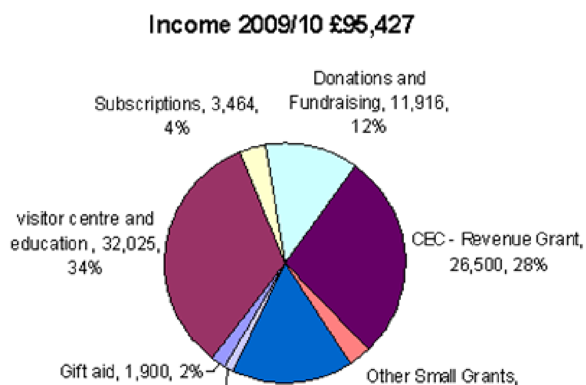
1. Promote the Water of Leith Visitor Centre as a visitor attraction and community resource.
2. Provide a focus for the encouragement of community and volunteer participation in the practical improvement of the river.
3. Work in partnership with landowners and official bodies responsible for the river to promote the effective management of the river valley.
4. Develop a quality Lifelong Learning Service for all age groups.
5. Promote volunteer involvement in all areas of the Trust's work.
6. Encourage the protection and enhancement of biodiversity along the river.
7. Promote the Water of Leith Walkway.
8. Gain new members for Water of Leith Conservation Trust and keep them.
9. Provide a well-resourced and safe base for the activities of Water of Leith Trust

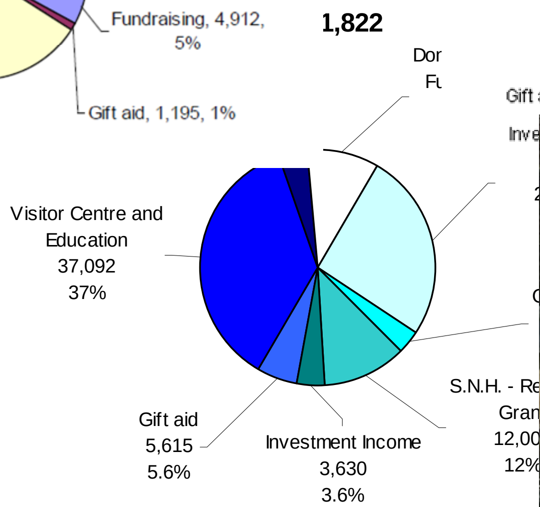
Funding

The Trust has secured some significant funding, accessing £5 million in 1997 for capital project work on matched basis from the Millennium Commission, City of Edinburgh Council and the local Enterprise company at that time, LEEL. The funding was targeted at completing the Water of Leith walkway and renovating the Slateford School house into the Water of Leith Visitor Centre.

Operational income comes from a variety of sources as shown below:







The WLCT has a membership programme with around 300 members. Most of these members are also involved in volunteering for a range of activities including:

- Fundraising activity
- Manning the visitor centre
- Patrols and Walkway Clean-ups
- Technical survey

Lesson from Benchmarks

- **Everyone likes to be by the water**
- **Innovative, low impact use of water resource**
- **Innovative use of forests and woodlands**
- **People will spend if they see value for money**
- **Are there options for designating any areas as paid for entry?**
- **Compartmentalise activity to help manage different visitor aspirations**
- **Update offer regularly**
- **Invest in upgrades regularly – this needs to be incorporated into the business model and finances**
- **Older generations are more active and want to take part**
- **Youth generation sometimes wants its own space – can we involve them in the design?**
- **The value of ‘free’**