Feasibility study for nature inspired learning and discovery tourist attraction, Llangollen

Final Report

Prepared by

Planning Solutions Consulting Limited

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Executive summary

WILD is a pioneering concept and offers an alternative approach to the provision of learning, recreation, play and activities within Llangollen and the wider county of Denbighshire. The concept has been developed by members of the local community in Llangollen.

The potential development site, Wenffrwd, is located to the east of Llangollen and has direct access to the A539. To the north of Wenffrwd is the Llangollen branch of the Shropshire Union Canal and there are separate proposals to create a pedestrian link from the Canal to the site itself. The River Dee is located to the south of the site. Two bus stops are located very close by the main entrance.

Wenffrwd is within a few miles of the Poncysyllte Aqueduct World Heritage Site and the Canal (also part of the WHS) passes adjacent to the site. Wenffrwd is relatively compact at nine acres, but offers very attractive long distance views.

The site is owned by Denbighshire County Council and is managed by Clwydian Range & Dee Valley AONB.

Formerly the Wenffrwd site was used for landfill and adjacent to the site is a sewerage water treatment plant. There is a level of noise intrusion from the A539 and some unpleasant odours from the adjacent sewage works, which impacts on the 'tranquillity' and appeal of the site.

There are proposals to develop a Pocket Park at Wenffrwd, which would act as a gateway site to the World Heritage Site and as a hub to the wider outdoors and Llangollen. This Pocket Park would act as the initial stage of the development programme. Funding is being sort from the Heritage Lottery Fund, Denbighshire County Council and the Welsh Government's RCDF fund to take the initiative forward.

There are a number of strategic policies which provide a framework for the feasibility study. These include the Wellbeing of Future Generations Act, the Environment Act, the Welsh Government Strategy for Tourism: Partnership for growth 2013-2020, the Children and Families (Wales) Measure 2010, Denbighshire County Councils' Economic and Community Ambition Strategy 2013-2023, Denbighshire Destination Plan 2017-2020, Clwydian Range and Dee Valley Area of Outstanding Natural Beauty AONB Sustainable Tourism Strategy 2015-2020 and Europarc Tourism Charter, Pontcysyllte and Canal World Heritage Site Management Plan and Canal and River Trust: Facing the Water (10 Year Strategy). A commentary is provided in Section 2.

The local demographic profile is relatively weak with some 34,000 residents within the 0 to 15 minute drivetime contour, a further 173,000 within the 16 to 30 minute doughnut and some 1.3 million residents within the 31 to 60 minute drivetime doughnut. Interestingly, in terms of the core family market across all three drivetimes the representation of adults aged between 25 to 44 are all below the index figure. Within all three drivetimes there is an under-representation of residents from the ABC1 social brackets.

The site benefits from a high level of passing traffic on the A539 – over 2 million vehicle movements per annum. If a quality food offer is presented there is the potential for WILD to become a stopping off point on people's journey. The roadside frontage also presents an important opportunity to market the 'WILD experience' to passing motorists through appropriate signage in a cost effective way.

There are a range of visitor experiences located within the sub-region and these are set out in Appendix Two. WILD has the potential to add to the critical mass of the tourism assets within the county and north Wales. It should be noted that the attractions market place is very competitive and WILD will be competing against a range of different and established attractions, some of which benefit from membership schemes and are only open on a seasonal basis.

North Wales along is an established tourist destination and Llangollen is an important visitor hub. Wales' best producing markets are internal (18%) and those 'next door' – for North Wales which means the North West (4.7%) and Midlands (6.2%) in England. Accommodation occupancy for North Wales rose between 2015 and 2016 from 66% to 68% for hotels, 54% to 59% for self-catering. There was no corresponding rise for guest house accommodation at 39% and hostels fell from 54% to 53%. Tourism in North Wales remains very seasonal in its nature.

There has been significant investment in the visitor experience sector in north Wales from Coed y Brenin through to Llandegla and Zip World (and associated sites). The number of North Wales attractions reporting visitor numbers to Visit Wales has fallen over time but from the data available it is clear that there has been a rise in recent years in those visiting environmental, landscape and countryside based attractions e.g. National Trust sites and Country Parks. It should be remembered however that relatively few attractions in Wales attract over 100,000 visitors.

Looking towards the future, WILD's vision sets out the scope of ambition of the project: **"Creation of a pioneering all-weather experience which INSPIRES, EXCITES and EDUCATES through the power of the natural world."** The WILD concept builds upon the Pocket Park, which is likely to incorporate the following elements:

- A new amenity area
- Countryside skills training site
- Natural play
- Accessible trails
- Tree coppicing area
- Car parking (with a low car parking charge)
- Management of invasive species and habitats
- Outdoor events facility

A long-list of uses were identified in the study programme and a weighted scoring matrix was used to assess the potential uses. The WILD project builds on the Pocket Park and also incorporates:

- A visitor centre with cafe (incorporating a small retail space) and flexible space, toilets, stores and office space
- The cafe will focus on using local produce where appropriate and has the potential to incorporate a small kitchen garden (using raised beds)
- A small-scale but high quality indoor play area
- Covered patio area linked to the cafe

The external area will incorporate:

- A bouldering area
- Accessible viewing tower
- Inspiring play elements, including a barefoot walk
- Viewing / interpretation points with seating
- BBQ area (for hire)
- Additional car parking spaces

Education and inspiration learning is central to the WILD ethos and a range of programmes will be offered such as woodland art, den building, scavenger hunts, themed events based on popular books / films and STEM projects (using skills to design / build / test / evaluate). Bush-craft based activities (including shelter building, fire-lighting, camp-fire cooking, tracking and navigation, water filtration), team-building games and problem-solving activities, orienteering and tracking games will also be available.

An annual programme of low-key events will also be set up and the calendar of events will help to:

- Encourage repeat visits and community involvement
- Build brand awareness
- Create PR opportunities
- Attract people who may not normally visit

It is recognised that the project will be inclusive in terms of the Welsh language. Additionally it is important that a 'Welsh sense of place' is designed in from the start as part of WILD's marketing effort and the visitor experience itself in terms of signage, food, retail, activities, interpretation, events etc. This will help to further differentiation the offer in the minds of the visitor and help to build stronger links with the local community.

Indicative capital costs are set out below (these exclude the capital costs of **£282,094 identified for the Pocket Park development).**

Estimated capital cost (excludes services/infrastructure and subject to survey)	Mid range
Visitor centre	
• 319 sq.m .	£934,200
• Cafe covers, furnishings etc • Servery • Kitchen equipment • Limited retail space	£50,000 £25,000 £75,000 £3,000
• Fit out of main building	£221,250
• Indoor play (high quality, small-scale)	£80,000
• Office, front of house technology (tills and PC)	£15,000
• Terrace - area with external covers and tensile shelter	£70,000

linked to visitor hub. Architecturally led example would have a higher capital cost	
• General landscaping linked to visitor centre	£40,000
External elements	
• Bouldering area	£75,000
• Barefoot walk and wash facility	£80,000
• Play area incorporating water play	£240,000
• BBQ area with 4 BBQs and seating	£8,000
• Outdoor shelter	£15,000
• Viewing tower	£75,000
• Natural play	£20,000
• Play elements on existing trail	£40,000
• Pizza oven and associated seating	£8,000
• Interpretation (budget for external and internal areas – excluding trail)	£20,000
• Orientation signage on site	£5,000
• Picnic tables and seating	£5,000
Car parking	
• Extended car park (34 additional spaces) and payment system	£78,000
Other	

• CCTV and alarm	£8,000
• Fencing	£15,000
• Secure yard (use existing)	£5,000
• Website	£7,000
• Enhanced entry and road signage	£6,000
• Secure bike storage	£2,000
Sub-total	£2,225,450
Professional fees @ 15%	£333,818
Contingency @ 15%	£333,818
Actual total (excludes Pocket Park costs)	**£2,893,085**

Note: The schedule above assumes Pocket Park goes ahead. Estimates are subject to site survey, preliminaries, input from a design team and QS. They exclude ground investigation, additional infrastructure/service requirements, the project team's staff costs to manage and deliver the project prior to opening and the link from the site to the towpath. We have assumed that the site is supplied by adequate services. Figures are net of VAT.

It has been forecast that the Pocket Park will generate approximately 5,000 visitors per annum. Below a cautious penetration rate is applied to the residential, tourism and day visitor market places along with passing motorists. It is recognised there is some overlap between these markets. We have also made an assumption that a number of canal boat and tow paths users will visit WILD.

Year One – indicative visitor numbers

Market	Number	Penetration rate	Frequency to visit	Potential visitors
Residential market				
0 to 15 minutes	34,145	4.0	3.0	4,097
16 to 30 minutes	173,480	2.0	2.0	6,939
31 to 60 minutes	1,289,333	0.50	1.0	6,447
Tourism markets (Denbigshire)				
Staying visitors	1,498,000	0.60	1.0	8,988
Day visitors (beyond 1 hour)	4,456,000	0.20	1.0	8,912
Passing traffic				
Motorists / passing traffic	2,112,620	0.25	2.0	21,126
Others				
Existing Pocket Park users				5,000
Education			NA	900
Events			NA	900
Passing canal users			NA	1,500
Annual car parking pass	100		8.0	2,400
			Indicative total (Year One)	**67,209**

It is recognised that WILD is different to a traditional visitor experience and that a significant proportion of the visitor numbers are driven by passing motorists stopping for a refreshment or other break.

The offer does not justify an admission charge but income will be secured via a car parking tariff based on dwell-time.

Income is shown at £275,500 in Year One increasing to £312,000 in Year Three. Key income streams are related to car parking, catering and retail. However, the overall position shows a deficit and the need for a subsidy in the order of £80,000 to £85,000 per annum. When other costs, such as, a sinking fund to refresh the visitor experience are taken into account, say £30,000 per annum, this will increase the deficit to approximately £110,000 to £115,000 per annum.

1.0 Introduction

1.1 The brief

This final report combines Phases One, Two and Three and sets out our findings in respect of the proposal to introduce a nature-inspired learning and discovery centre and experience at the Wenffrwd site, to the east of Llangollen.

It should be recognised that the concept and initial ideas for the 'WILD' experience have been developed by WILD Llangollen an organisation set up by a group of local parents. The parents have identified a need for a resource in the Dee Valley to help children experience the local environment and at the same time bring wider benefits in terms of the local economy and tourism sector.

The other project partners and funders include Cadwyn Clwyd Cyfyngedig (Cadwyn Clwyd) and Clwydian Range & Dee Valley Area of Outstanding Natural Beauty.

1.2 Report structure

The report is structured in the following way:

- Section 2 - sets out an overview of the proposed site at Wenffrwd and summarises the key strengths, weaknesses, opportunities and threats associated with the site. The wider strategic context is also considered as it will be important to ensure future development proposals align with strategic outcomes and priorities where possible.

- Section 3 – provides an overview of the market place including the demographic profile, tourism market place, competitive landscape and information on key trends related to Welsh culture.

- Section 4 – outlines the guiding principles and Vision for the project and identifies the critical success factors of viable visitor experiences. It also considers the options on two different levels – firstly, on 'scale' (i.e. the scale of development the Wenffrwd site can realistically accommodate) and secondly, assessing the individual component elements of the WILD experience. Indicative capital costs are set out along with a schedule of areas within the visitor centre itself.

- Section 5 – provides an assessment of charging options, identifies potential visitor numbers (including a three year trading profile) and sets out wider benefits of the project.

- Section 6 – presents wider project considerations including the updated risk assessment, development opportunities and constraints as well as information on potential sources of capital funding

- Section 7 – sets out our concluding remarks

1.3 Methodology

Our approach has involved background research including site visits and consultation, review of data held by the wider client team, a market review and analysis based on our consultancy and operational experience to identify the potential trading performance of the proposed experience. We have also drawn on our sister company's direct experience of managing visitor centres, these include:

- CONKERS – an environmental, education and activity experience in the National Forest

- Kent Life – a heritage farm park in Maidstone

- The National Brewery Centre – a heritage experience in Burton upon Trent

- The Cotswold Country Park and Beach – a country park in the Cotswolds

2.0 The site and strategic context

2.1 The site

Location and access

Wenffrwd is located approximately 1.7 miles to the east of the centre of Llangollen on the A539, which links through to Llangollen to the west and continues through to Trevor and Overton Bridge in the east (please see site map below).

Source: Briefing document

The site is adjacent to the A539 with direct access to this A road. Careful consideration will need to be given to managing vehicular access from this relatively fast flowing road. We understand that this is being addressed as part of two separate planning applications to be submitted by the adjacent landowner and the AONB.

Current access from the site to the A539 (to the west and east)

The Llangollen Branch of the Shropshire Union Canal towpath provides a connection with the centre of Llangollen and is located to the north / north east of the site. There is potential to create a pedestrian access link directly to the towpath from the site. A pedestrian route from the health centre in Llangollen stops just short of the site. As part of any future development proposals it would be beneficial to engage with the adjacent landowner to explore the possibility to connect the last 200 metres between this route and the site.

Two bus stops are located within 20 metres of the site. We understand the buses run every 20 minutes Monday to Saturday and less frequently on Sundays and Bank Holidays.

It should be noted that within Llangollen, visitor car parking remains an issue and it will be important to ensure any future proposals do not add to this issue. At the same time it remains a concern that people who park at the proposed site may not actually visit WILD itself.

The site

Wenffrwd is a former landfill site which incorporates a secure depot with an area of hard standing on the northern boundary of the site. The site is 'sandwiched' between the attractive River Dee and the canal. The site is owned by Denbighshire County Council and is managed by Clwydian Range & Dee Valley AONB.

Llangollen Branch of the Shropshire Union Canal


Former depot area towards the northern boundary of the site

As the A539 runs along the northern edge of this site the roadside frontage provides a high degree of visibility and it offers in effect a level of 'free marketing' to passing vehicles. From an operational perspective, it will be important to ensure the lead uses are located away from the roadside edge and it would be beneficial to create a buffer zone between the road and the main visitor hub.

The site extends to approximately nine acres, which impacts on its carrying capacity. Careful landscaping and zoning will be important in terms of usage and future planning and this has been considered as part of the Pocket Park proposal.


Looking in a south westerly directly and south easterly direction

The topography of the site is varied with the upper half relatively flat. Part of the lower half of the site slopes away offering attractive long distance views.

There is a level of noise intrusion from the A539 and some unpleasant odours from the adjacent sewage works, which impacts on the 'tranquillity' and appeal of the site.

Environmental considerations and site habitats

In terms of environmental considerations, we understand from the Preliminary Ecological Appraisal (2016)[1] that the closest sites of ecological importance are the River Dee (and Bala Lake) / Afon Dyfrdwy (a Llyn Tegid), a Special Area of Conservation / Site of Special Scientific Interest approximately 55 metres to the south of the site. Berwyn a Mynyddoedd De Clwyd / Berwyn and South Clwyd Mountains Special Area of Conservation lies approximately 500m to the north of the site.

The Ecological Appraisal identified the following habitats as being present on the site:

- Semi-natural broadleaved woodland
- Mixed broadleaf/conifer plantation
- Dense Scrub
- Semi-improved neutral grassland
- Tall ruderal
- Bare ground and hard standing

Habitats located on site

The stand of trees located towards the eastern boundary of the site presents an attractive environment which could be suitable for low key forest based activities such as bushcraft skills.

The Client team are in early discussions with the Planning Department at Denbighshire County Council. A separate site assessment is being commissioned to identify the main risks associated with the site. This assessment will review the legal aspects of taking on the site, liability, operating structures, planning, and environmental considerations. It is recognised that Japanese Knotweed is present on the site.

[1] Wenffrwd Pocket Park – Preliminary Ecological Appraisal TACP, 2016

2.1.2 Existing development proposals for the site

We understand that a planning application for the development of a Pocket Park incorporating a car park, landscaped areas, walking and cycling trail has been submitted by the Clwydian Range & Dee Valley AONB. This project is seeking funding from the Heritage Lottery Fund, Denbighshire County Council and the Welsh Government's RCDF fund. It is hoped that construction will start in March 2018 to deliver this specific element of the wider project. This is a positive step and presents an opportunity for WILD particularly in terms of helping to reduce the overall capital costs required to deliver the wider concept. Please see concept sketch below.

Source: Client Team

2.1.3 Site SWOT

Below we set out a site SWOT analysis, a market SWOT is set out in Section 3.

Strengths	**Weaknesses**
• Site with 'roadside frontage' - passing traffic on A539 • Pedestrian links to Llangollen via towpath and on bus route • Existing services and infrastructure (assumed due to previous industrial use) • Attractive long distance views • Stand of mature trees on part of the site • Site is relatively compact reducing maintenance costs/resource requirements • Limited local neighbours to object to the development proposals • Proximity to Llangollen Branch of the Shropshire Union Canal (passing canal boats and other water craft users) • No apparent major environmental planning constraints on the site • Existing proposals for landscaping, car parking and trails (Pocket Park initiative)	• Out of town location • Former use as landfill may restrict some uses on the site (or where they can be located) • Existing proposals for the Pocket Park show limited car parking spaces • Difficult site for coaches (school groups) to access • Access / egress to A539 (fast flowing traffic) • Whilst site is compact this may lead to some 'capacity issues'

Opportunities	Threats
• Act as a gateway to Llangollen (as a stop off point on journey) and the Pontcysyllte and Canal World Heritage Site • Explore potential uses alongside 'visitor experience' e.g. farm shop /local produce shop integrated within cafe • Topography could lend itself well to creating specific zones of use • Introduce direct linkage from canal towpath and extend footpath from health centre to site (perhaps as a secondary phase) • Potential touring park being introduced adjacent to the site (significant number of users which could be served by the WILD offer) • Innovative partnership opportunities with Denbighshire County Council, AONB and adjacent landowner e.g. acquire additional land (in the future)	• Undiscovered contaminants which may emerge during construction or operational phases • Unable to secure a long term lease or similar level of security from Denbighshire County Council. This security of tenure will be a key consideration for funding bodies • Foot and Mouth Disease or similar which could impact on the movement of people (visitors) in rural areas

2.2 Strategic context

The strategic context for the project includes the following core policies:

- The Wellbeing of Future Generations Act[2]:
- The Environment Act[3]

[2] http://gov.wales/topics/people-and-communities/people/future-generations-act/?lang=en#
[3] http://gov.wales/topics/environmentcountryside/consmanagement/natural-resources-management/environment-act/?lang=en

- The Welsh Government Strategy for Tourism: Partnership for growth 2013-2020[4]
- The Children and Families (Wales) Measure 2010.[5]
- Denbighshire County Councils' Economic and Community Ambition Strategy 2013-2023[6].
- Denbighshire Destination Plan 2017-2020.[7]
- Clwydian Range and Dee Valley Area of Outstanding Natural Beauty AONB Sustainable Tourism Strategy 2015-2020 and Europarc Tourism Charter.[8]
- Pontcysyllte and Canal World Heritage Site Management Plan.[9]
- Canal and River Trust: Facing the Water (10 Year Strategy).[10]

These are shown in detail as Appendix One with the most relevant policies shown in bold text. The key strategic policies are highlighted below:

The Wellbeing of Future Generations Act provides the key overriding principles for sustainable development in Wales. All of these principles have been embraced by the aspirations outlined by the WILD project team.

The Environment Act gives specific duties to government and its agency, Natural Resources Wales in respect of environmental management.

The aim is to make the most of the opportunities that Wales' natural resources present resonates strongly with the principles and Vision for WILD.

The Welsh Government Strategy for Tourism: Partnership for growth 2013-2020 has at its core the aim to build the profile of tourism in Wales with new product experiences at its

[4] http://gov.wales/topics/culture-tourism-sport/tourism/partnership-for-growth-strategy/?lang=en

[5] https://www.legislation.gov.uk/mwa/2010/1/contents

[6] https://www.denbighshire.gov.uk/en/your-council/strategies-plans-and-policies/corporate-strategies/economic-and-community-ambition-strategy.aspx.

[7] http://www.discoverdenbighshire.wales/wp-content/uploads/2017/10/LR_DMPartwork-English.pdf

[8] http://www.clwydianrangeanddeevalleyaonb.org.uk/files/1079945525-Sustainable%20Tourism%20Strategy%202015%20-%202020.pdf

[9] https://www.pontcysyllte-aqueduct.co.uk

[10] https://canalrivertrust.org.uk/refresh/media/original/9445-north-wales-and-borders-strategic-waterway-plan.pdf?v=84348e

core particularly where they are targeted at new demand and all weather, year round visits. The WILD project is well placed to help deliver on this policy.

The key element of The Children and Families (Wales) Measure 2010 recognises the measure to provide a duty for local authorities to secure sufficient play opportunities for children

Denbighshire County Councils' Economic and Community Ambition Strategy 2013-2023 identifies desired outcomes across 6 themes including building on the strengths of tourism and retaining and building vibrant towns and communities.

Denbighshire Destination Plan 2017-2020. The plan is integrated into the overall Denbighshire's Economic Strategy above. The strategy aims to strike a balance between promoting the most popular sites, protecting the environment, and spreading the benefit of tourism across the whole region

The Destination Management Action Plan seeks to achieve the following:

- Increase the number of staying visitors and high-yield visitors to the region
- Provide a memorable and high-quality experience for all visitors
- Contribute to the aim of growing Wales' market share of domestic and international tourism

The AONB produced a Sustainable Tourism Strategy in 2015 which reflects the European Charter for Sustainable Tourism in Protected Areas and current policies in Wales on sustainable development, the environment and tourism. One of the four functional objectives focuses on product development – activities and experiences. It highlights the objective to develop and enhance year round visitor experiences and promotable offers based on appreciation, enjoyment and understanding of the area's special countryside and heritage assets.

The Pontcysyllte Aqueduct and Canal is within 5 miles of Wenffrwd and was inscribed as a World Heritage Site in 2009. Its Management Plan was developed to meet its future needs and to co-ordinate the efforts of the partners – of which Denbighshire is one – in its development. The Management Plan for the World Heritage Site sets out a strong long term vision for its future to balance the needs of protection, conservation and access, the interests of the local community and the achievement of sustainable economic growth. It also aims to attract visitors to the area and generate income that adds value to the local economy. WILD can be an important contributor in this sense.

The 10 year strategy for the Canal and River Trust (Facing the Water) gives encouragement to the WILD goals and the site offers a ready access point to the Llangollen canal and towpath.

3.0 Understanding the market

3.1 Demographic analysis

In terms of exploring the opportunities to introduce a visitor experience at Wenffrwd it is important to understand the local and wider sub-regional demographic profile. It should be noted that visitor flows generated from the tourism market are subject to seasonal variations and that a number of 'attractions' have limited or reduced opening hours during the Winter period. The local residential market, particularly within the 0 to 30 minute drivetime contour is likely to be the key driver of users, particularly outside of the main tourist season.

As part of this study we have carried out a demographic analysis of the residential population living within the 0 to 15, 16 to 30 and 31 to 60 minute drivetime contours. [11]

The further residents are located away from Wenffrwd the propensity to visit will decrease and the size of the competitive marketplace will increase (i.e. people have more alternative options open to them).

Headline residential figures are presented in the table below. Within the immediate core 30 minute drivetime market place the population reaches just over 200,000 residents, which is a low density. Within the overall hour the population reaches 1.5 million people which is still relatively low.

Drivetime contour	Population
0 to 15	34,145
16 to 30	173,480
31 to 60	1,289,333
Total	**1,496,958**

[11] Crown copyright 2013. Source: Office for National Statistics licensed under the Open Government Licence v.3.0. © Crown Copyright Contains Ordnance Survey data © Crown copyright and database right 2013. Data has been sourced from CACI.

As a comparison, it is interesting to note that the residential population living within the 30 and 60 minute drivetime contours of the Shropshire Hills Discovery Centre are 37,982 and 921,592 respectively (source: Geoplan). The Discovery Centre does not have a car parking tariff or specific admission charge – although there is a charge to visit an exhibition.

Another example is the former Heart of the National Forest Visitor Centre (located on a 12 acre site) where the residential population located within the primary 60 minute drivetime was just over 5.2 million residents and the visitor centre generated approximately 90,000 to 100,000 visits per annum. The Heart of the National Forest Visitor Centre had a relatively low admission charge.

Alongside the residential population base we understand that there are plans to introduce just under 100 new homes within Llangollen. In addition, further new housing is proposed in and around Wrexham which includes plans for more than 300 houses at Ruabon.

The Office for National Statistics produces population forecasts and at the local authority level the latest projections were released in 2014. For Denbighshire, the population is forecast to increase from 95,530 in 2018 to 97,199 in 2028. Over the 10 year period this represents an increase of just over 1.7%.[12]

Age profile

In terms of the age profile within the immediate 15 minute drivetime contour the representation of children aged 0 to 14 are either in line or slightly above the index figure. This only equates to some 6,251 children. However, within both the 16 to 30 and 31 to 60 minute doughnuts the representation of younger children are below the index figure, apart from 10 to 14 year olds within the 31 to 60 minute doughnut.

In terms of the core family market across all three drivetimes the representation of adults aged between 25 to 44 are all below the index figure. The difference between the index figure and the specific drivetimes is particularly high for adults aged 25 to 29 where across all three drivetimes the representation is some 13% to 15% below the index figure.

[12] https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Projections/Local-Authority/2014-based/populationprojections-by-localauthority-year

Population by Age	0 to 15 minutes			16 to 30 minutes			31 to 60 minutes		
	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100
0-4	2,261	6.6	107	10,212	5.9	95	75,312	5.8	95
5-7	1,238	3.6	106	5,766	3.3	98	43,163	3.3	98
8-9	732	2.1	100	3,597	2.1	97	27,383	2.1	99
10-14	2,020	5.9	102	9,979	5.8	99	75,907	5.9	102
15	487	1.4	117	2,164	1.2	102	15,980	1.2	101
16-17	952	2.8	113	4,318	2.5	101	33,419	2.6	105
18-19	750	2.2	84	4,173	2.4	92	30,710	2.4	91
20-24	1,970	5.8	85	10,468	6.0	89	75,191	5.8	86
25-29	2,000	5.9	86	10,292	5.9	87	74,323	5.8	85
30-44	6,648	19.5	95	33,422	19.3	94	246,436	19.1	93
45-59	6,713	19.7	101	35,378	20.4	104	266,557	20.7	106
60-64	2,393	7.0	116	11,914	6.9	113	88,332	6.9	113
65-74	3,220	9.4	108	17,246	9.9	114	126,969	9.8	113
75-84	1,980	5.8	104	10,396	6.0	108	79,100	6.1	110
85-89	521	1.5	104	2,703	1.6	107	20,056	1.6	106
90+	260	0.8	101	1,452	0.8	111	10,495	0.8	108

Social grade

We set out below a breakdown of the social grades of residents living within the 15, 16 to 30 and 31 to 60 minute drivetimes.[13] Within both the immediate 15 minute contour and the 16 to 30 minute doughnut there is a significant under-representation of residents from the AB (higher / intermediate managerial /admin / professional) and C1 (supervisory, clerical, junior managerial / admin / professional) social grades when compared to the index figure. This is particularly pronounced within the 15 minute contour whereby the representation of ABs is 37% below the index figure and the representation of C1s is some 20% below the index figure.

Conversely there is an over-representation of residents from the C2 (skilled manual workers) and DE (semi-skilled and unskilled manual workers, on state benefit, unemployed,

[13] Please note where the difference is 10% or greater than the index figure the figures are highlighted

lowest grade workers) social grades within the 15 minute contour and 16 to 31 minute doughnut.

Within the 31 to 60 minute doughnut the representation of ABs and C1s is still below the index figure and the representation of people from the C2 and DE social grades are above the index figure, although the difference is less compared to the two other drivetimes.

Social Grade	0 to 15 minutes			16 to 30 minutes			31 to 60		
	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100
AB: Higher/intermediate managerial /admin / professional	1,464	14.0	63	10,108	19.3	86	82,075	20.8	93
C1: Supervisory, clerical, jr managerial/admin/professional	2,593	24.9	80	14,396	27.4	89	114,498	29.0	94
C2: Skilled manual workers	2,771	26.6	127	12,838	24.5	117	86,968	22.0	105
DE. Semi-skilled and unskilled manual workers, on state benefit, unemployed, lowest grade workers	3,604	34.5	133	15,162	28.9	111	111,531	28.2	109

Economic activity

The table below highlights the economic profile of the residential population living within one hour's drivetime of the site. Within the 16 to 30 and 31 to 60 minute drivetime doughnuts, the representation of economically active residents in fulltime and part-time employment are either in line or above the index figure. Importantly the representation of unemployed residents is below the index figures within both of these doughnuts. However, within the immediate 15 minute drivetime contour the number of economically active residents is below the index figure by some 4%.

In terms of economic inactivity across all contours/doughnuts there is a significantly higher representation of retirees – some 16% above the index figures within the 0 to 15 and 31 to 60 minute drivetimes. Residents who are classified as either long-term sick or disabled are also above the index figures across all drivetimes. Within the immediate 15 minute contour this figure is some 36% above the index figure.

Economic Activity	0 to 15 minutes			16 to 30 minutes			31 to 60 minutes		
	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100
Economically active	16,530	67.1	96	89,163	70.1	101	652,658	69.3	100
- Employee full-time	9,239	37.5	97	49,295	38.8	100	362,920	38.5	100
- Employee part-time	3,555	14.4	105	19,036	15.0	109	140,187	14.9	109
- Self employed	2,019	8.2	86	12,107	9.5	100	83,509	8.9	93
- Unemployed	1,108	4.5	102	4,924	3.9	88	39,681	4.2	96
- Fulltime student economically active	609	2.5	71	3,801	3.0	86	26,361	2.8	81
Economically inactive	8,116	32.9	108	38,048	29.9	98	289,279	30.7	101
- Retired	3,989	16.2	116	20,157	15.8	114	152,485	16.2	116
- Full-time student economically inactive	1,120	4.5	79	5,851	4.6	80	39,545	4.2	73
- Carer (looking after home or family)	1,099	4.5	105	4,310	3.4	79	35,034	3.7	87
- Long term sick or disabled	1,424	5.8	136	5,642	4.4	104	45,787	4.9	114
- Other economically inactive	484	2.0	91	2,088	1.6	76	16,428	1.7	81
Unemployed aged 16-24	346	1.4	113	1,498	1.2	95	12,053	1.3	103
Unemployed aged 50-74	195	0.8	97	968	0.8	93	7,692	0.8	100
Unemployed: never worked	168	0.7	97	632	0.5	71	5,578	0.6	84
Long-term unemployed	449	1.8	105	1,962	1.5	89	15,443	1.6	95
All people aged 16 to 74	**24,646**			**127,211**			**941,937**		

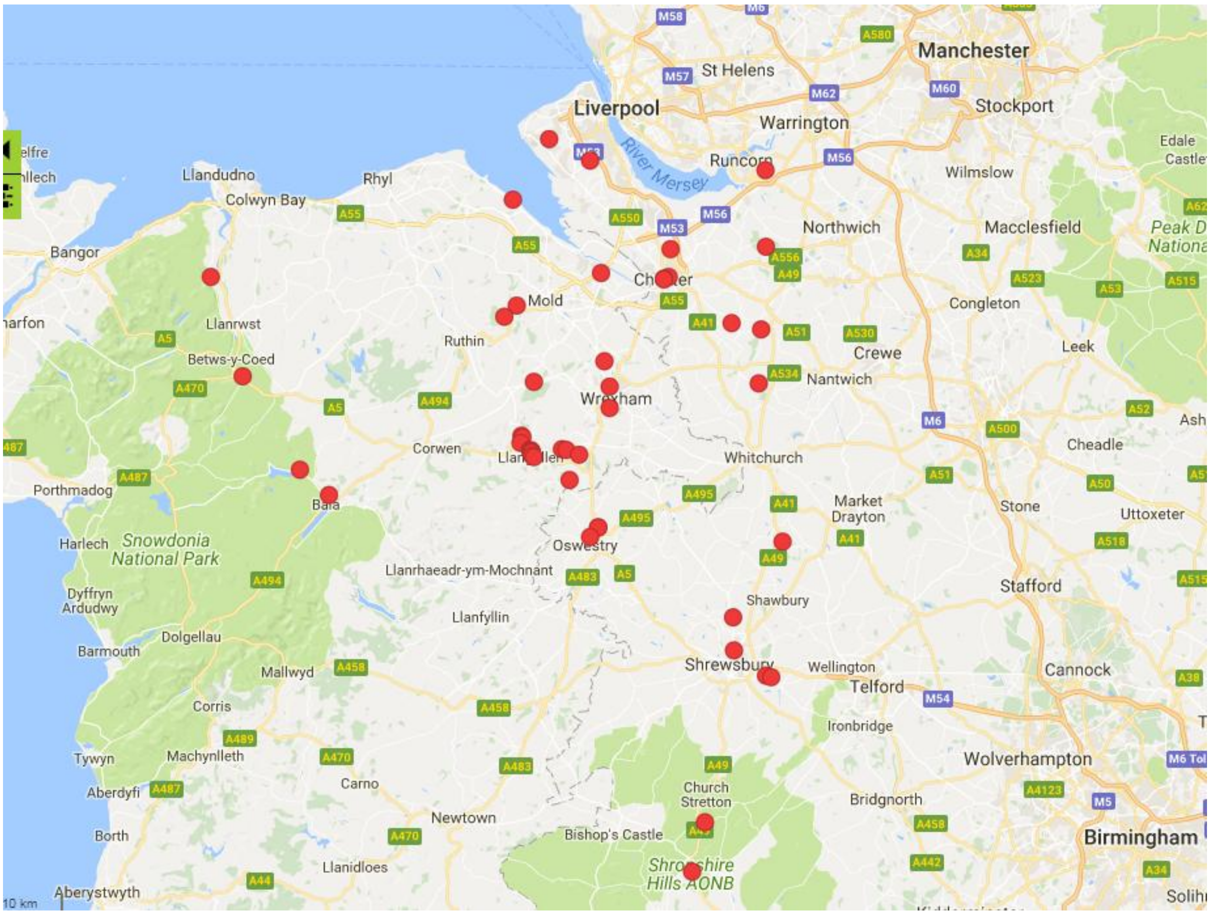
3.2 Traffic on local road network

Vehicle movements on the A539 represent a significant potential market opportunity to exploit. If a good quality food offer is provided, WILD could become a stopping off point on people's journey. Just as importantly this presents an important opportunity to market the offer' to passing motorists through appropriate signage in a cost effective way.

Annual average daily flows on this link of the A539 are 5,788 vehicles which includes some 65 HGVs. This equates to 2,112,620 vehicles passing the site over a year. A low penetration rate of this market could generate a significant level of throughput. 2016 figures are provided by the Department for Transport and the count point is located just to the east of the site.

3.3 Competitive landscape

For ease of reference we set out as Appendix Two in tabular format a range of attractions and visitor experiences (from heritage properties through to farm parks and heritage railways) which are located within a 60 minute drivetime of the site. This provides an overview of the competitive landscape and below we set out key implications for the WILD site. The locations of the attractions are also shown on the map below. We note the project's origins in terms of satisfying the needs of young families looking for high quality and sustainable activities in the environment. The nearby attractions seeking to appeal specifically to the young family market through all or part of their offer are identified with an asterisk in the Appendix.



Source: Geoplan

It should be noted that the immediate area includes a number of important 'assets' which add to the attractiveness of Llangollen and its hinterland, in particular:

- The historic town of Llangollen hosts a number of major events including the Llangollen International Musical Eisteddfod and Annual Food Festival along with a range of small-scale events.
- The area boasts a range of impressive heritage assets such as the Llangollen Steam Railway, Llangollen Museum, Plas Newydd, Valle Crucis Abbey and Eliseg's Pillar.
- To the east is Pontcysyllte Aqueduct and Llangollen Canal World Heritage site, which generates over 400,000 visits per annum. Consultation is currently underway on plans to enhance of the visitor offer at Trevor Basin (please see box below).

- Llangollen is home to a good range of cafes, pubs and restaurants, which benefit from passing footfall.

- Environmental assets such as the River Dee, stunning landscape and the wider Clwydian Range and Dee Valley AONB all add to the attractiveness of the area.

- There are many renowned and even 'iconic' sites of high scenic value and areas where people can interact with nature and the natural environment, but access is not necessarily straightforward.

- Interestingly, a scheme known as The Welsh Dragon Project, a mixed use leisure project near Chirk, is seeking funding to take the project forward. The project combines retail with catering, gardens and events space, a deli, art gallery, sculpture park and an iconic dragon sculpture.

What does this mean for the project?

- A significant proportion of the visitor experience sector is reliant upon external funding to support the operation (particularly in terms of reinvesting in the visitor experience). The Shropshire Hill's Discovery Centre has gone through periods of difficulties, which highlights the vulnerability of a service which is not part of a Council's statutory responsibilities.

- The market is very competitive. In understanding and assessing market gaps it is important to recognise that WILD Llangollen will be competing against a range of established attractions and leisure activities from the World Heritage Site through to greenspaces (country parks / parks which are free to access) and 'discovery' type experiences.

- All-weather provision of facilities will be important in terms of driving year round use.
- Play continues to have a central role at many attractions in reaching the family market.

- A number of attractions are only open on a seasonal basis which reflects the size of the available market. It also highlights the need for diversification e.g. adding a farm shop which can help to attract throughout and generate income outside of the main tourist season.

- Membership organisations such as the National Trust benefit from a large 'database' of Members who can be targeted cost-effectively. This highlights the importance in many cases of developing a local membership scheme. CONKERS has developed an annual membership scheme which helps to drive year round use.

- It is often too easy to think of other attractions as competitors, but these may offer opportunities for joint marketing and co-promotional activities and joint packages.

The suggested proposals for the Trevor Basin should be noted. If taken forward this will have a significant impact on the WILD proposals. The proposed project at Trevor Basin comprises:-

- A new visitor centre and visitor experience
- Extra car parking
- New footpaths and cycleways
- Improved signage
- Recreation of historic transport routes
- Enhanced infrastructure for business boating customers and private boaters
- Tree management to enhance views
- Creation of new habitat/ green space on former industrial land

Source: https://canalrivertrust.org.uk/news-and-views/news/public-consultation-into-future-development-around-world-heritage-site-at-trevor-basin

It is recognised that the project at Trevor Basin has the potential to promote and support other tourism businesses and encourage visitors to the WHS to visit other destinations and attractions within the sub-region.

We would strongly recommend that this document is used by WILD (and project funders) as a basis to meet with the CRT to identify the outline proposals for the Trevor Basin (we have not had a response to the questionnaire despite several requests). If a new visitor centre is introduced at the Trevor Basin it will make it more challenging to access funding to introduce another visitor centre within the local area.

3.4 Tourism profile

Visit Wales (VW) is leading on 3 initiatives which are informing marketing and product development, and importantly guiding where VW is investing those resources under its own control and influence:

'This is Wales' fully bilingual **brand** and branding http://walesthebrand.com with these objectives

- Elevate our status
- Surprise and Inspire
- Change perceptions
- Do good things
- Be unmistakably Wales

'Years of…..' approach to underpin and focus annual campaign activity on clear areas of market strength and differentiation: 2016 Adventure, 2017 Legends, 2018 The Sea, 2019 Discovery

Wales Way http://thewalesway.com longer term route based approach to travel, product clustering and development – Llangollen and Pontcysyllte are identified anchor points on the North Wales Way route (East/West). This approach is specifically aimed at building awareness and confidence in overseas markets where Wales currently underperforms. While the brand has been refreshed the target market remains the same: Independent Explorers – segmented further as follows:

- Older Cultural Explorer Couples
- Scenic Explorer Couples
- Pre-Family Explorers
- Active Family Explorers

Destination Performance Measurement

It is perhaps early days for this new approach to convert into tourism performance, but the signs are promising. As a result of the Year of Adventure, and the investment in unique experiences such as Surf Snowdonia, Bounce Below and Zip World, North Wales is now arguably the adventure tourism capital of the UK with Top 10 destination status in Lonely Planet in 2017.

The way tourism is measured differs at a local, national and international level. The International Passenger Survey, Great Britain Tourism Survey and GB Day visit survey are based on national surveys, with results disaggregated for countries, regions and destinations (with increasingly reliable sample sizes) while individual local authorities in Wales subscribe to the STEAM model which builds up a destination- wide picture from locally derived occupancy, footfall and other data where available and proxy data where they aren't.
For a project like WILD it is perhaps more relevant to think about the wider Visitor Economy, not just tourism, as local community users are just as important to overall success as those defined as tourists

Tourism 'Headlines'

- In 2016 staying visitors from the UK made 9.3m trips to Wales, stayed for 33m nights with a value of £1.7bn. This was 11.2% down on 2015, but the methodology does throw up quite big swings between years. The 2010-2016 trend however shows an overall 1.4% increase in trips, 0.2% increase in nights and 3.4% increase in spend[14].

- This is against a trend of UK residents moving back to Overseas Destinations after the post-recession 'staycation' phenomenon. 45% of all UK holiday trips are now taken abroad.

- Visitors stay longer in Wales on a trip to Wales, 3.7 days on average compared with 2.9 in England but even so spend less at £181 per trip against £186. This means that each tourist has almost one more full day to fill per trip compared to the average for England.

- Welsh people are more likely to stay in their own country than residents of England or Scotland

- Not surprisingly Wales' best producing markets are internal (18%) and those 'next door' – for North Wales that means the North West (4.7%) and Midlands (6.2%)

- Overseas visits to Wales increased by 7% in 2016 to 1.07m spending 7.17m nights (ave. 6.67) with a value of £444m (or £413 per head). However Wales only has 3% of overseas travel to Great Britain against 5% of population. [15]

[14] Great Britain Tourism Survey
[15] International Passenger Survey

- The best producing overseas markets for Wales remain Ireland, France, Germany and US

- Accommodation occupancy for North Wales rose between 2015 and 2016 from 66% to 68% for hotels, 54% to 59% for self-catering. There was no corresponding rise for guest accommodation at 39% and hostels fell from 54% to 53%. [16]

- Staying Tourism to Wales remains highly seasonal outside the South East

- Day visits represent the largest component of the Wales Visitor Economy with year-on-year visits up 3.7% and spending up 20.8% to £3.3bn. However those visits with a clear purpose (eg visiting a particular site or activity) fell by 3.3%[17]

- Many day visits therefore are less aspirational and unstructured in nature involving general sightseeing, visiting friends or family, 'special' shopping, taking a meal or snack. Day Visitors in Wales however are much more likely than the GB average to take a short (<2 miles) or long (>2 miles) walk as part of a day out

- Encouragingly, day visits in Wales were split fairly evenly between types of destination: 27% cities/ large towns, 24% small towns, 28% countryside, 20% seaside – in North Wales this profile was more skewed towards the seaside (37%) with city/ large towns at 12%, small towns at 22% and countryside at 28%.

- The average distance travelled on a day out in Wales is high at 53 miles (but crudely this represents 26 miles in each direction…) and average spend is £40

- Day visits show less seasonality than other markets with 43% of visits in Wales taking place October to March

- The numbers of North Wales attractions reporting visitor numbers to Visit Wales has fallen over time but from the data available it is clear that there has been a rise in recent years in those visiting environmental, landscape and countryside based attractions eg National Trust sites and Country Parks. It should be remembered however that relatively few attractions in Wales attract over 100,000 visitors

[16] Visit Wales Occupancy Survey
[17] Great Britain Day Visitor Survey

- There is a STEAM series for Denbighshire from 2005. This shows that despite the recession in 2008, economic value has risen in real terms over 11 years from £345.7m to £479.3m, visits from 4.87m to 5.95m and visitor days from 9.11m to 11.38m. Employment has risen from 5,464 to 6,250 FTEs[18]

- Tourism in Denbighshire however remains very seasonal with 72% of value, 69% of visits and 72% of visitor days being generated April to September. This explains why many attractions close or reduce hours in the autumn and winter months

- An extract of the STEAM figures suggests the value of tourism in Llangollen itself is £54.5m (11.4% of Denbighshire overall) from 459k visits and 841k visitor days[19]

3.5 Welsh language experience

Research by Dr Robert Lewis, Visit Wales Head of Research, in 2014/15 tested the attitude of visitors (from outside Wales) to exposure to Welsh Language during a visit.[20] For 41% it would have no impact (positive or negative), for 15% it would be negative and for 37% it would be positive.

Negative connotations were almost exclusively confined to those over 55, with 18-34 year olds most positive to the language. Females were more positive than males. The new Wales brand is unapologetic about the Welsh Language but links it positively to a contemporary vision of Welsh design, culture, art, celebrity, innovation and confidence.

3.6 Primary research

3.6.1 Tourism businesses

A broad range of tourism businesses and organisations were consulted as part of the research. Responses have been received from:

- Visit Wales
- Llangollen TIC/ North Wales Tourism
- Llangollen Chamber of Trade and Tourism
- Llangollen Railway
- Llangollen International Music Eisteddfod
- (Canal and River Trust response still awaited)

[18] Scarborough Tourism Economic Activity Monitor Denbighshire 2016 Report
[19] Based on small numbers of businesses reporting figures
[20] DARPARIAETH IAITH GYMRAEG A DWYIEITHOG YN Y SECTOR TWRISTIAETH YNG NGHYMRU

Despite individual reminders, the number of responses was limited. The Chamber has offered the opportunity for WILD to present to one of its monthly meetings.

In terms of what Llangollen is good at, there was strong agreement around the International Eisteddfod and other Festivals and Events, Railway, Canal and World Heritage Site and Activity Tourism.

Not very weather resilient...

Current challenges for the town are seen as car parking, peak traffic congestion, the quality and range of hospitality (food, drink, hotel accommodation), wet weather attractions for families.

There was seen to be a product/ market opportunity around education and accessibility by some eg fully accessible trails. Others were keen to see the activity product closer to the town eg zip lines.

It needs to excite, be a world first, be ambitious.....

There was consensus around the key elements of an 'environmental activity centre': interactive and 'hands on' experiences, programmed activities and events, interpretation of the particular locality (eg AONB geology), café, parking. It is understood that the centre could act as a gateway to the AONB, World Heritage Site/ Canal and Llangollen itself.

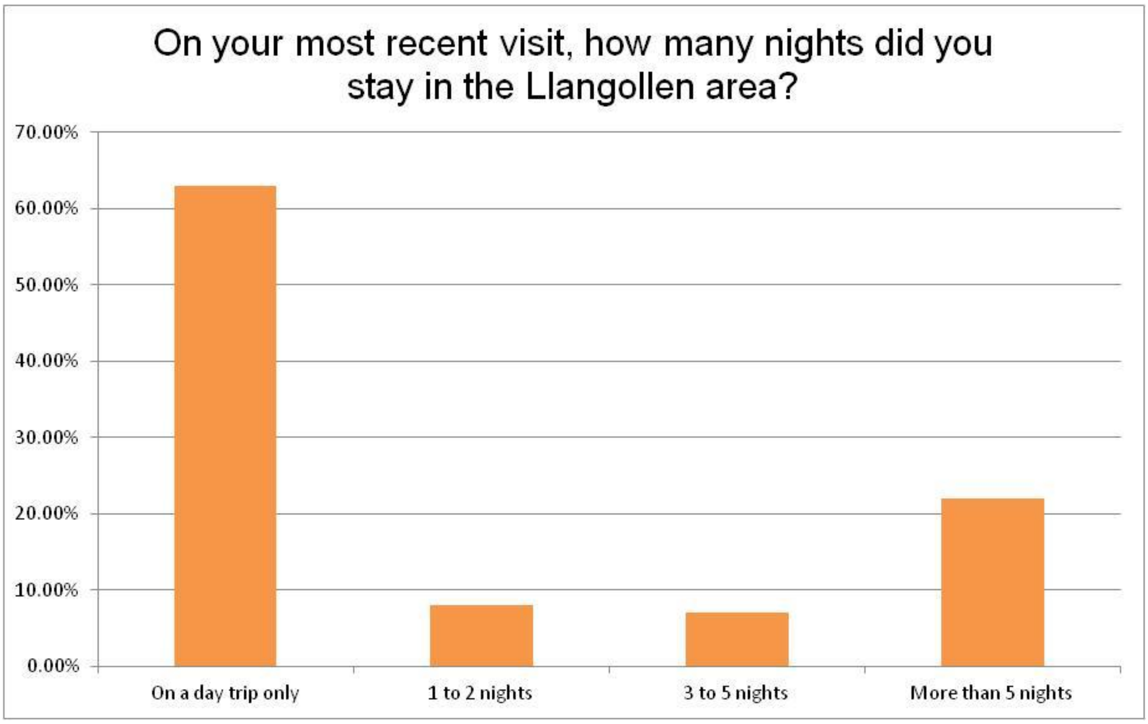
Is the out of town location an issue – a positive or negative?

However there is concern that unless the offer is regionally distinctive and compelling and the linkages made strong it could create displacement for other attractions or businesses in Llangollen and the area. This is particularly acute in respect of the proposed new visitor centre at Trevor Basin, which is seen as clear competition.

3.6.2 Visitor survey

An online survey targeted visitors to Llangollen. This generated 101 responses and was promoted via WILD's tourism contacts.

The research identified that the majority of participants (63%) were on a day trip on their most recent visit to Llangollen and some 22% were on a stay of over five nights (please see chart below).



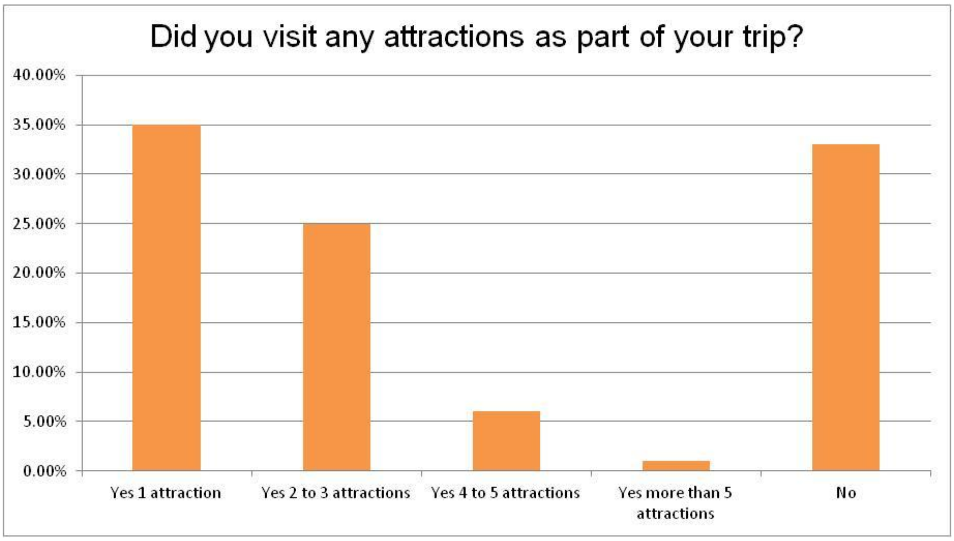
It should be noted that approximately 63% of participants who supplied a postcode either live in Wrexham, Llangollen or Corwen.

Encouragingly for 16%[21] of participants the main reason they visited Llangollen was to visit an attraction. For 38% the main purpose was to visit friends and family and during their trip they may also have visited an attraction.

Main purpose of last visit to Llangollen	%
On a leisure break	18.18%
Visiting an attraction	16.16%
Attending an event	8.08%
Visiting friends and family	38.38%
Going on a shopping trip	16.16%
Taking part in an adventure activity	3.03%

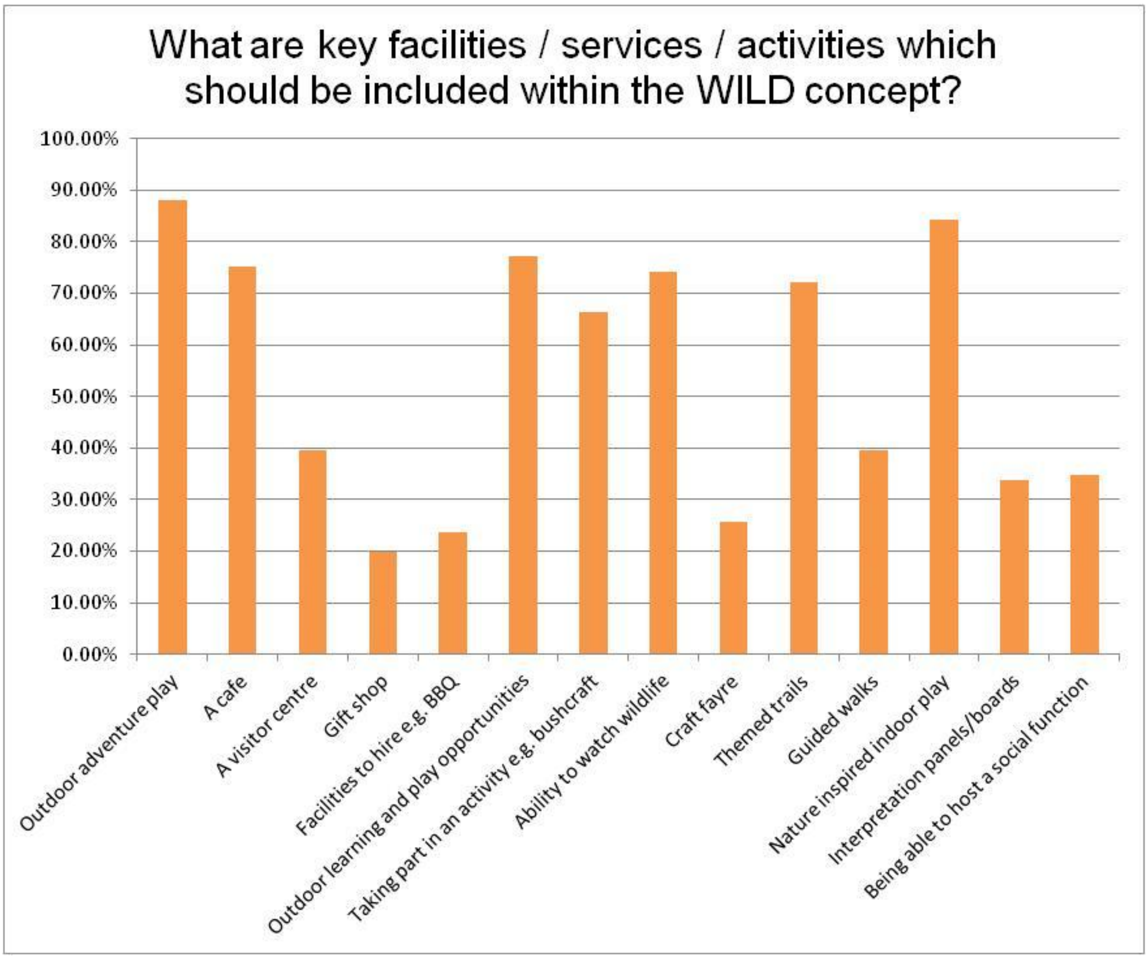
[21] Please note percentages have been rounded

During their trip 67%, of visitors went to an attraction as part of their trip. 35% visited one attraction and 25% between two and three attractions. Please see the table below. We set out as Appendix Three the different attractions people visited.



Similar to the community survey a high percentage of respondents (92%) felt that there is a need for additional all weather family activities and facilities in Llangollen and the surrounding area (2% said no and 6% said that they did not know).

The table below sets out the key facilities which could be incorporated within the WILD visitor experience. Please note totals add up to more than 100% as participants could select more than one answer.



Outdoor play, indoor nature inspired play, outdoor learning experiences, a cafe, the ability to observe wildlife and themed trails all generated a high level of interest. Two participants specifically commented on the need for facilities for people with disabilities – "a sensory room for the handicapped (young and older) and a sitting area for the adults."

Based on the WILD concept some 97% of respondents would be likely to visit. However, one participant did note "At the moment it sounds very over estimated. For a project like this to really be able to offer parents and children a really good day out takes major investment. As a community idea I can't see it having the financial backing that would be required for it to be a major success."

Encouragingly 86% of participants would make a specific trip to visit WILD.

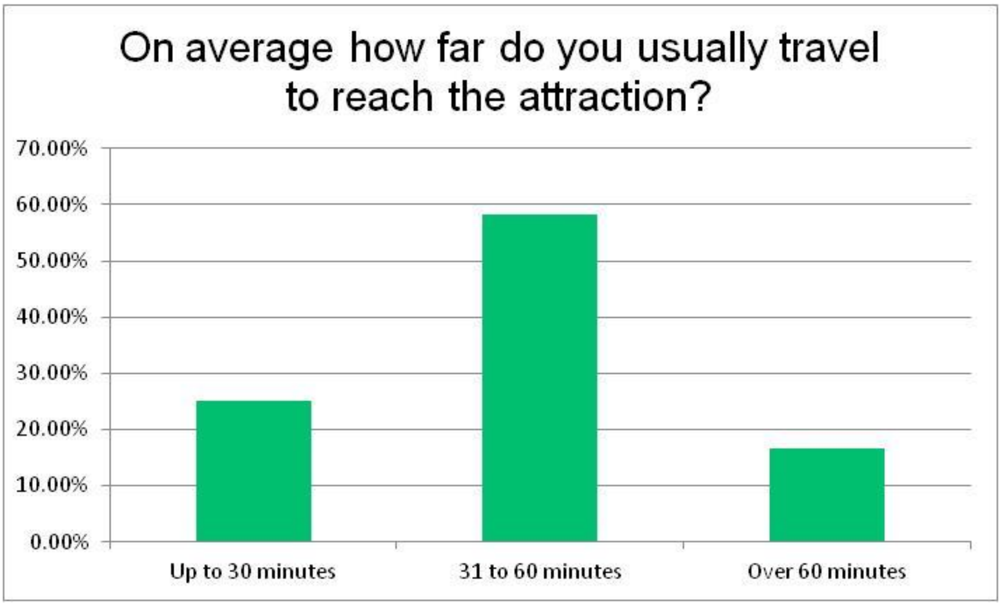
The average age of respondents (for those who provided a specific age) was just over 40 years old and participants ranged in age from 13 to 72. 66% of respondents were aged between 30 and 49.

3.6.3 Community survey

An online survey was also set up and promoted by WILD with the objective of engaging with individual members of the local community. The number of responses achieved was 12. This provides a useful indication but is a low evidence base and makes it difficult to draw statistically robust conclusions from the results. The results are summarised below.

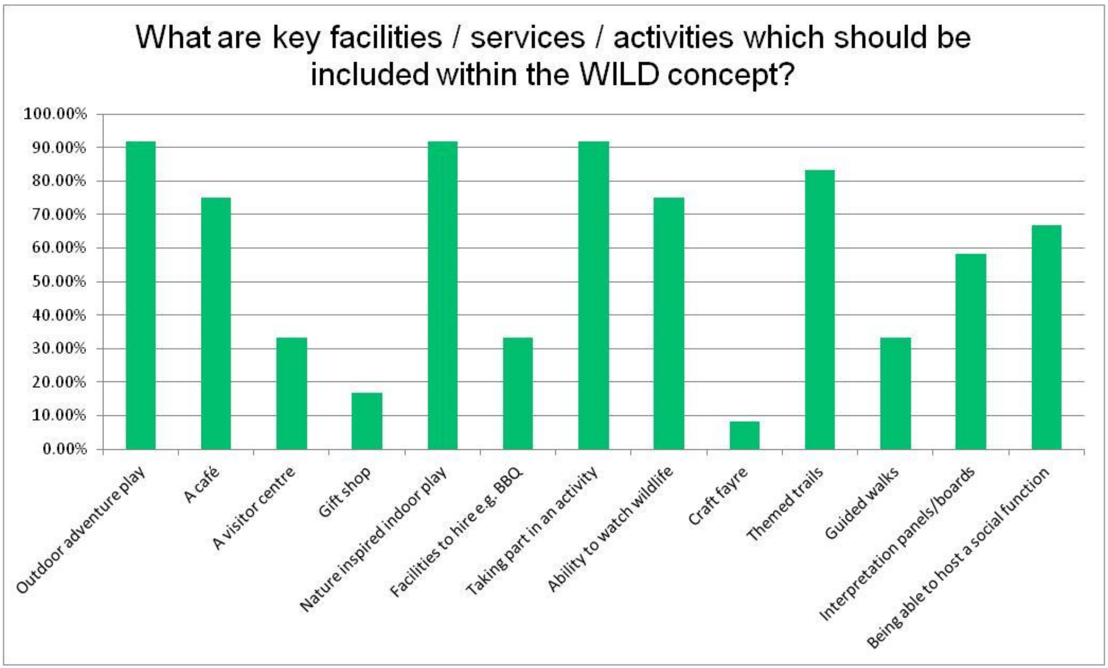
All respondents had been to a visitor experience within the last 12 months, with 25% visiting 2 to 3 attractions, 17% visiting between 4 and 5 and 58% visiting over 5 attractions (includes parks).

The table below shows the average time people spend travelling to attractions they visit.



All participants felt that there is the need for additional all weather family activities and facilities in Llangollen and the surrounding area. Some 83% of participants felt that there were not enough suitable attractions/destinations for them in the local area.

Participants were asked about the key facilities which could be included within the WILD concept and these are set out below. Please note the answers added up to more than 100% as participants could select more than one answer.



Both indoor nature inspired and outdoor adventure play, along with the opportunity to take part in an activity, observe wildlife, themed trails and a cafe generated high scores. A craft fayre type of offer along with a gift shop generated very low scores.

Eleven out of the 12 participants would be likely to visit WILD.

The average age of respondents was just above 43 years old.

3.6.4 Local groups

A number of local groups were contacted as part of the consultation process which generated five responses.

In the last 12 months 60% of the organisations have visited somewhere as a group. Places the organisations have visited include the local fire station, library, local shops and landmarks, Pensychnant Conservation Centre with one participant commenting there are "too many to list".

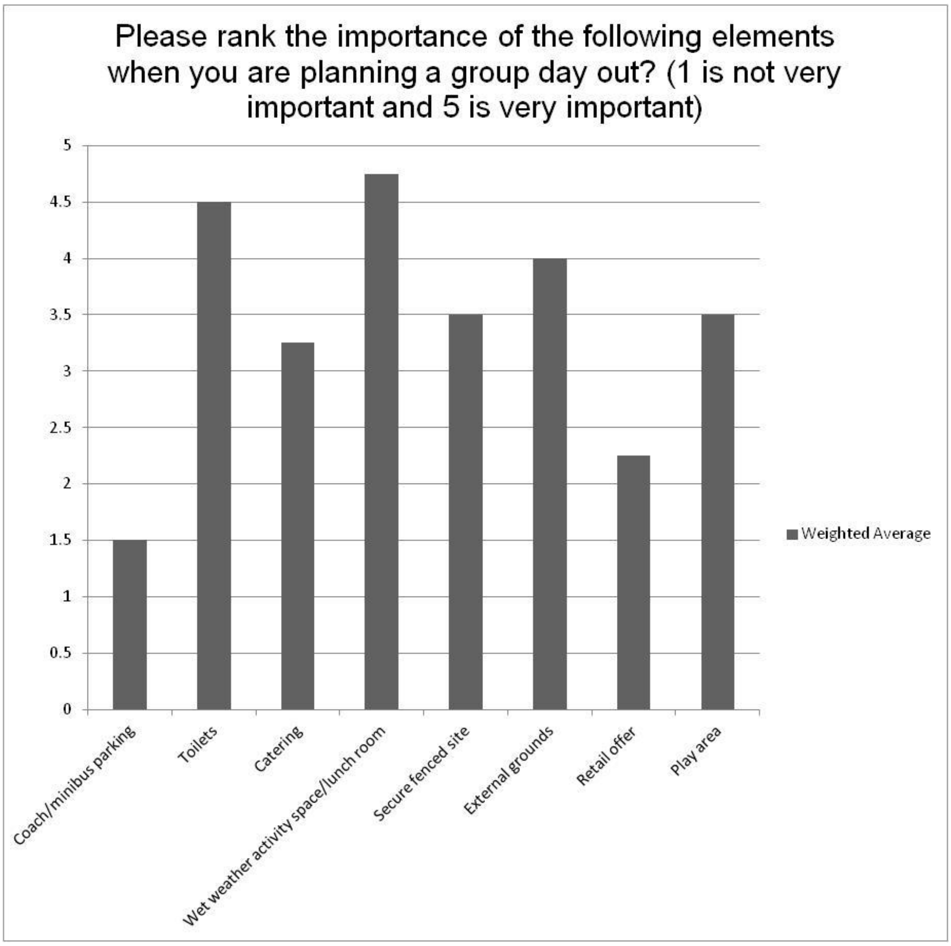
Interestingly, when asked how many times a year the group takes part in an organised trip three participants responded once a year and one participant responded four or more times per year.

Group sizes on organised trips varied - for participants who responded to this question 50% reported a group size of 1 to 10 people and 50% reported a group size of 11 to 20 people.

Similarly the time groups were prepared travelling to reach a destination varied. 50% reporting they travelled for up to 30 minutes and 50% over 60 minutes.

When taking part in an organised day out, 75% of participants reported that they usually do not pay any admission fee or tariff. 25% of participants reported paying an admission fee or tariff (on average over £5 per head).

The key facilities required when groups are organising a day out type of activity are summarised in the chart below.



75% of respondents stated that they would visit WILD and 25% of respondents may visit but that they required more information before making a decision.

Respondents were asked whether they feel if there are enough suitable attractions / destinations for groups in the local area and 50% felt there were enough suitable attractions.

3.6.5 Schools

Five schools responded to the survey (although one school responded three times and two of their responses have not been included in the results below). The number of pupils attending the three schools range from 150 through to 1,050.

All of the responding schools offer offsite visits as part of the learning experience. In terms of the number of times per annum pupils can take part in offsite learning activities, this is split equally between each school – one selecting once per annum, one two to three times and one four or more times per annum. All responding schools travel between 31 to 60 minutes to reach their destination.

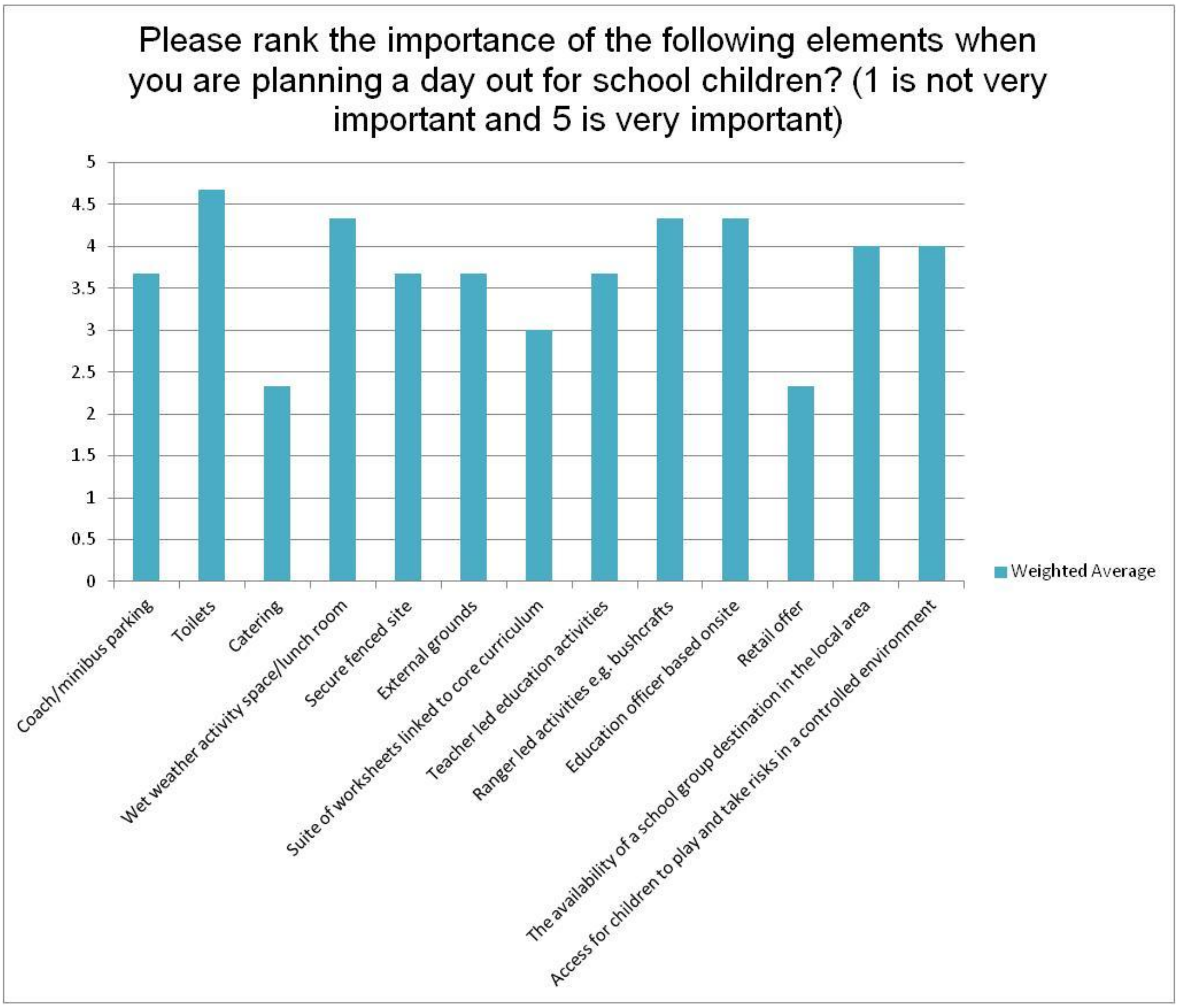
On their most recent excursion, schools visited: Glyndwr University Careers Fair, Blue Planet-Cheshire Oaks and the theatre at Clwyd Mold. One respondent commented “various places, we try to keep local because of the need to be during school times however DofE is more open to location etc.”

In respect of the tariffs paid by responding schools, excluding travel, these are set out below.

Answer Choices	%
Free, we don’t usually pay an admission price	33.33%
Up to £3.00	33.33%
£3.00 to £5.00	0.00%
Over £5.00	33.33%

In our experience we are finding it is becoming more challenging to attract schools to take part in days out. The programme offer needs to fit with the national curriculum and be something which schools cannot readily replicate in their own grounds.

In the table below we set out the core elements of an ‘education visitor experience’.



One of the responding schools offers onsite learning opportunities in respect of outdoor learning e.g. forest school, bushcraft and orienteering.

One of the three responding schools felt that there are enough suitable school-trip destinations for your younger students in the local area. Only one of the responding schools would visit the WILD offer, the remaining two were undecided and would require more information before making a decision.

Successful day trips for schools also need to consider: Risk Assessments, DBS checks, organisation, travel time and potentially accommodation.

Interestingly all three schools felt that children in their school do not get enough opportunities to be outside with access to outdoor education settings.

3.7 Summary market SWOT

<table>
<tr><th>Strengths</th><th>Weaknesses</th></tr>
<tr><td>Close to established tourist destination on edge of Llangollen
Within 4 miles of Pontcysyllte Aqueduct WHS, a major visitor site
Passing traffic on the A539 - En route for proportion of visitors to Snowdonia
North Wales growing reputation for adventure activities
Local tourism is growing in terms of trips, nights and spend
Visit Wales is actively promoting the ‘North Wales Way’ to new and overseas visitors, including Llangollen as a key anchor</td><td>Competitive marketplace - number of attractions in region
Representation of residents from AB and C1s social grades are below the national average. There is an over-representation of residents from the C2 and DE social grades. This has implications in terms of spending power and pricing (introducing an admission fee)
Low headline residential population figures emphasise the importance of the tourism market place and also the passing traffic
Limited size of market in respect of families with children within immediate drivetime contour (15 minutes) and also within the 16 to 30 minute doughnut</td></tr>
<tr><th>Opportunities</th><th>Threats</th></tr>
<tr><td>Promote WILD as a ‘stopping off’ point for passing motorists
Develop a strong annual pass product to encourage a high level of repeat visitation
Develop joint marketing consortia with thematic and/or geographic groupings</td><td>Proposals at Trevor Basin
Risk of low visitor throughput outside main season</td></tr>
</table>

4.0 Options appraisal

To identify the future development scenario and levels of intervention there are three key tasks to complete:

1. Identify the scale of development

2. Identify and assess the individual component elements of the future development scenario (long list)

3. Set out the future development scenario

4.1 What creates an engaging visitor experience?

In considering the opportunity for creating a new visitor centre and associated external spaces it is important to recognise the core characteristics of engaging and successful visitor experiences in the UK leisure marketplace. We can summarise these as follows:

- Attractive and unambiguous - with a strong sense of arrival, good first impressions with accurate information and signage

- Offering high standards of service by customer-focused, motivated staff including on-site staff (and volunteers) who have a genuine pride in the visitor experience

- Clean, well-maintained amenities, grounds, landscape and equipment

- Providing a product appropriate to its market which is promoted with a strong sense of place

- Regular reinvestment to refresh the visitor experience

- Incorporates high quality catering attractively presented (and retail in a number of instances)

- Places a real emphasis on 'entertaining' the guest through activities, events and animation

- Respects the special qualities of the site in terms of its environment and/or heritage

4.2 Guiding principles and Vision

A workshop environment was used to help identify and agree the underlying guiding principles which provide a 'framework' for future development scenarios. The original Vision was reviewed and it was agreed that with minor adjustment this captured the ethos of the WILD project.

4.2.1 Guiding principles

The guiding principles include:

- Creating an economically sustainable experience which provides employment opportunities for local residents and generates a surplus which can be reinvested within the business to refresh the offer

- Developing a project which showcases environmental sustainability through the construction and operational phases. WILD will provide a space for learning about the environment through hands-on activities, events and interpretation

- Become a resource for the local community, which is inclusive and responds to the needs of the community, whilst recognising the needs of the day visitor and tourism market place

- Providing a space for families to engage with nature and play

4.2.2 Vision

"Creation of a pioneering all-weather experience which INSPIRES, EXCITES and EDUCATES through the power of the natural world." **WILD**

4.3 Scale of potential development

It is important to identify the scale of development which could potentially be accommodated at Wenffrwd. There are several different levels of interventions which should be considered and these include:

4.3.1 Option One: Minimum level of intervention – existing proposals for a Pocket Park

This option recognises that the site is currently underutilised and that there is a cost associated with managing the site. The site has a prominent location with attractive views, however, currently the visual appearance of the site appears derelict and detracts from the environmental quality of the immediate and wider area.

The ambition is to introduce a Pocket Park with the following elements:

- A new amenity area
- Countryside skills training site
- Natural play
- Accessible trails
- Tree coppicing area
- Car parking
- Management of invasive species and habitats
- Outdoor events facility

The site will have a parking charge and it is envisaged that this will generate enough income to pay for the upkeep and maintenance of the park.

Pros	Issues / constraints
• Low level of capital expenditure (potentially funded by HLF/others) • Immediate impact (represents a quick win) • Managed solution which will enhance the visual appearance of the site and the recreation amenity (creates a	• Full potential of the site is not being realised (e.g. education based experiences) • Few opportunities to generate revenue • Local/community focus – limited appeal to wider visitor market

positive impression and is an accessible greenspace for the community) • Low risk option (from financial and planning perspectives) • Straightforward delivery of project and operation of site • Starts to unlock potential of the site and provides a base for future development (can test demand and acts as a catalyst). • Potential first stage of development, which does not preclude future development options • Provides useful and convenient orientation and access point for WHS/ AONB assets beyond the site	• Does not meet ambitions of WILD project team • No wet weather facilities • Strong seasonal usage patterns • Potential undiscovered technical issues which could add significantly to capital costs (applies to all uses below to a larger degree) • Fails to correspond with elements of the Vision

4.3.2 Option Two: Medium level of intervention – visitor centre and associated external offer

This option focuses on the WILD concept, which builds upon the Pocket Park project. It is envisaged that the intensity of use will increase and:

- The issue of wet weather resilience will be addressed through the introduction of a visitor centre (potentially a modular design)
- Additional experiential elements will be introduced within the overall site
- Volunteers are likely to be a key resource and the facility will be staffed.

Pros	Issues / constraints
• Provides a 'welcome gateway' to Llangollen from the east • Ability to engage with different market segments • Introduction of indoor space improves wet weather resilience • Could demonstrate innovative partnership approach between WILD and Denbighshire County Council/AONB in terms of delivering services • Able to incorporate some elements of sustainable design • Increases opportunities for interpretation of WHS/AONB • Enables range of education services to be delivered (from formal learning through to building confidence, bushcraft, physical development and emotional skills related activities) • Significant PR opportunities • Potential to attract some form of commercial sponsorship / joint venture • Contributes to tourism offer and generates associated economic and	• Higher capital cost • Complex project to deliver and manage • May potentially require a level of revenue support • Would need to extend current car parking proposed for Option One. • Potential for site to reach capacity on some peak days • Site is relatively 'tight' for a wider attraction • Potential to lose community focus

social benefits • Links into Llangollen's profile as a base for adventure activities • Builds positively on the Pocket Park concept • Corresponds closely to the project Vision, combining visitor and community spaces	

4.3.3 Option Three: High level intervention – major visitor centre

This builds on Option Two. The main difference relates to the investment within the visitor centre, which is likely to be a signature building with additional and dedicated internal spaces (rather than the use of flexible spaces). This option would require the acquisition of adjacent land to deliver the overall experience.

Pros	Issues / constraints
Builds on the above pros/strengths • Acts as an exemplar of sustainable design • More likely to justify an admission fee • Potential for major gateway facility for Llangollen • Significantly adds to the tourism profile and product offer within the wider area • Meets many elements of the Vision,	• Potential undiscovered technical issues which could add significantly to capital costs (given scale of development) • Major capital fund raising required • Likely to dominate the site with limited available external areas • Would require significant increase in car parking provision (via land assembly or partnership agreement with adjoining land owner) • Very complex project to deliver and

(but risks losing community focus)	manage (likely to require commercial operator) • Likely to require significant revenue support • Greater risk of project failure and danger of becoming a 'white elephant' • Would require the acquisition of additional land • Lose community focus

4.3.4 Scoring matrix for scale of development

The scoring matrix below has used a range of criteria to help identify the 'scale' of development which could potentially be accommodated on the site.

Criteria			
	Option One: Minimum level of intervention – 'Pocket Park'	**Option Two: Medium level of intervention – WILD concept**	**Option Three: High level intervention – major visitor centre**
Enhancing Llangollen as a 'destination' / adding to critcial mass of tourism products	3.0	7.0	8.0
Contributing to policy	3.0	7.0	8.0
Indicative capital costs	8.0	5.0	1.0
Ease of deliverability	8.0	5.0	1.0
Physical fit with site	8.0	7.0	1.0
Potential environmental impact	7.0	7.0	3.0
Concept fit	4.0	7.0	2.0
Total Score	**41.00**	**45.00**	**24.00**

Scoring range
0 low, 10 high (please note a high capital cost generates a low score)

The site appears to be more suited to a low to medium level of intervention which has a strong fit with Option Two (the WILD concept). The Option scored particularly well in terms of contribution towards policy outcomes (health and wellbeing, economic development, learning and education) and enhancing Llangollen as a destination. Due to the level of capital investment for this option, there would be a need to secure a long-term lease from Denbighshire County Council before approaching funders. **It is important to recognise that Option Two has a strong fit with the Vision for the project although it has limited all-weather appeal (in comparison with Option Three).**

4.4 The visitor experience

4.4.4 Assessment criteria and scoring matrix

In terms of identifying the different elements which have the strongest fit and the greatest potential we have produced a weighted scoring matrix (using a score of 1 to 5 with 5 being the maximum awarded), with a range of criteria to assess the individual uses/products/services which are shown in the table below.

Please note this has not considered infrastructure requirements or planning fit.

Comments on basis for scoring	
Site and operational considerations	
Physical fit	• Does the 'element' physically fit within the boundary of the site
Synergy with the concept	• The level of synergy with the WILD concept
How critical is the element?	• Does the element make a critical contribution to the success of the concept?
Market considerations	
Potential to attract local market	• Local market appeal
Potential to attract existing tourist market in Llangollen	• Market appeal amongst existing visitors
Potential to attract new visitors to Llangollen	• How likely is the element / facilities to attract new visitors to Llangollen?
Policy considerations	
Policy	• Potential to help deliver policy outcomes

Deliverability	
Deliverability	• Ease of deliverability • Level of risk associated with the development scenario • Identified champion to drive the project forward
Financial considerations	
Income generation Indicative capital requirement	• The potential to generate income • The capital cost of the project

Potential uses	Site and operational considerations			Market considerations			Policy Considerations	Ease of Delivery	Financial considerations		Scores	
	Physical Fit	Synergy with 'concept'	Does element make critical contribution to concept success?	Potential to attract local market	Potential to attract existing tourist market in Llangollen	Potential to attract new visitors to Llangollen	Helps to deliver policy outcomes	Deliverability	Capital cost	Potential to generate income	**Total score**	**Total weighted score**
Weighting	2.5	3.0	2.5	1.5	2.0	2.0	2.0	1.5	2.0	2.5		
Activities												
Bike hire linked to visitor centre	8.0	9.0	4.0	3.0	8.0	2.0	4.0	4.0	8.0	2.0	52.0	**116.5**
Bouldering	8.0	7.0	5.0	7.0	6.0	2.0	3.0	8.0	7.0	1.0	54.0	**114.5**
Aerial trekking activity (compact structure)	3.0	7.0	4.0	5.0	7.0	3.0	5.0	3.0	3.0	10.0	50.0	**111.5**
Innovative above ground adventure (eg rollglider)	3.0	5.0	3.0	5.0	8.0	5.0	5.0	2.0	2.0	10.0	48.0	**105.5**
Temporary climbing structure	8.0	6.0	3.0	5.0	6.0	1.0	2.0	8.0	8.0	2.0	49.0	**104.0**
Trampers (including route development)	5.0	7.0	3.0	6.0	7.0	2.0	4.0	4.0	6.0	3.0	47.0	**101.5**
Bike skills training area	4.0	8.0	2.0	6.0	5.0	1.0	2.0	6.0	9.0	1.0	44.0	**93.5**
Pump track - BMX	5.0	5.0	2.0	6.0	4.0	2.0	3.0	5.0	8.0	1.0	41.0	**85.5**
Skate park	5.0	3.0	1.0	6.0	1.0	0.5	2.0	2.0	6.0	1.0	27.5	**57.5**
Events												
Dedicated events space / outdoor performance area (introduce infrastructure)	6.0	8.0	5.0	7.5	7.0	4.0	5.0	7.0	8.0	3.0	60.5	**128.8**
Covered amphitheatre	6.0	8.0	4.0	7.5	8.0	4.0	5.0	3.0	4.0	4.0	53.5	**116.8**
Designated area for marquee (excl associated catering spend)	7.0	5.0	3.0	7.0	4.0	3.0	3.0	6.0	9.0	3.0	50.0	**105.0**
Other elements of the visitor experience												
Themed trails	7.0	9.0	8.0	7.0	7.0	4.0	5.0	7.0	7.0	1.0	62.0	**134.0**
Viewing tower	9.0	8.0	7.0	6.0	6.0	4.0	4.0	7.0	7.0	2.0	60.0	**130.5**
Signage incl sense of welcome	9.0	9.0	7.0	5.0	6.0	2.0	2.0	9.0	9.0	1.0	59.0	**128.5**
Interpretation points	9.0	9.0	7.0	5.0	5.0	2.0	3.0	8.0	9.0	1.0	58.0	**127.0**
Seating / picnic area	9.0	9.0	6.0	6.0	4.0	2.0	2.0	9.0	9.0	1.0	57.0	**123.5**

Potential uses	Site and operational considerations			Market considerations			Policy Considerations	Ease of Delivery	Financial considerations		Scores	
	Physical Fit	Synergy with 'concept'	Does element make critical contribution to concept success?	Potential to attract local market	Potential to attract existing tourist market in Llangollen	Potential to attract new visitors to Llangollen	Helps to deliver policy outcomes	Deliverability	Capital cost	Potential to generate income	**Total score**	**Total weighted score**
Wildlife hut / bird hide	9.0	8.0	6.0	5.0	5.0	3.0	3.0	9.0	8.0	1.0	57.0	**123.0**
Outdoor shelter for different uses	9.0	8.0	7.0	4.0	4.0	2.0	2.0	9.0	9.0	1.0	55.0	**120.0**
Tree top walk - wooden small-scale	6.0	8.0	4.0	7.5	7.0	6.0	5.0	3.0	4.0	4.0	54.5	**118.8**
Outdoor gym	8.0	8.0	4.0	8.0	2.0	1.0	4.0	8.0	8.0	1.0	52.0	**110.5**
Sculpture features (trail)	7.0	6.0	4.0	6.0	6.0	5.0	4.0	6.0	7.0	1.0	52.0	**110.0**
Sensory garden	8.0	7.0	4.0	4.0	5.0	2.0	2.0	9.0	9.0	1.0	51.0	**109.0**
BBQ area for permanent bbqs (for pre-booked hire)	8.0	6.0	4.0	5.0	4.0	1.0	2.0	9.0	9.0	3.0	51.0	**108.5**
Play (outdoor - assumes accessible / inclusive)												
Natural play	9.0	9.0	9.0	7.0	8.0	3.0	5.0	8.0	8.0	3.0	65.5	**150.0**
Adventure play	8.0	7.0	9.0	9.0	8.5	4.0	5.0	7.0	5.0	3.0	65.5	**140.0**
Low ropes course (no charge)	7.0	7.5	8.0	8.0	8.5	2.5	5.0	7.0	8.0	3.0	64.5	**138.0**
Play trail (including interpretation)	7.0	8.0	8.0	8.0	8.0	3.0	5.0	7.0	6.0	3.0	63.0	**135.5**
Barefoot walk	8.0	8.5	6.0	7.0	7.0	4.0	5.0	6.0	7.0	3.0	61.5	**133.5**
Sand and water play	7.0	8.0	7.0	8.0	7.0	5.0	5.0	6.0	5.0	3.0	61.0	**131.5**
Willow / hurdle maze	8.0	8.0	5.0	5.0	6.0	2.0	2.0	9.0	9.0	1.0	55.0	**118.0**

Potential uses	Site and operational considerations			Market considerations			Policy Considerations	Ease of Delivery	Financial considerations		Scores	
	Physical Fit	Synergy with 'concept'	Does element make critical contribution to concept success?	Potential to attract local market	Potential to attract existing tourist market in Llangollen	Potential to attract new visitors to Llangollen	Helps to deliver policy outcomes	Deliverability	Capital cost	Potential to generate income	**Total score**	**Total weighted score**
Visitor centre												
Visitor centre / hub building(s)												
- Cafe	7.0	9.0	9.0	7.5	6.0	4.0	6.0	5.0	3.0	8.0	64.5	**143.8**
- Indoor play (small scale)	7.0	8.0	7.5	8.0	7.0	4.0	5.0	5.0	4.0	7.0	62.5	**137.3**
- Farm shop / deli integrated within cafe	8.0	7.0	7.0	8.0	6.0	2.0	4.0	6.0	7.0	7.0	62.0	**135.0**
- Dedicated classroom	8.0	9.0	6.0	7.0	2.0	2.0	7.0	7.0	6.0	5.0	59.0	**129.5**
- Arts based use eg Paint a pot unit	9.0	8.0	5.0	6.0	6.0	2.0	3.0	7.0	7.0	2.0	55.0	**119.5**
- Craft units	6.0	7.0	6.0	6.5	7.0	3.0	3.0	5.0	7.0	3.0	53.5	**115.8**
- Flexible space	7.0	8.0	7.0	6.0	3.0	2.0	4.0	6.0	5.0	4.0	52.0	**115.0**
- Interactive zone	7.0	8.0	5.0	6.0	7.0	5.0	3.0	2.0	3.0	5.0	51.0	**114.5**
- Gallery / exhibition area	7.0	7.0	4.0	6.0	7.0	4.0	3.0	5.0	5.0	4.0	52.0	**113.0**
- Retail offer	8.0	6.0	5.0	5.0	6.0	2.0	3.0	6.0	6.0	4.0	51.0	**111.0**
Seasonal kiosk (assumes no visitor centre)	9.0	5.0	4.0	6.0	1.0	1.0	1.0	8.0	8.0	6.0	49.0	**105.5**
Garden / plants centre offer	4	5.0	4.0	6.0	4.0	1.0	3.0	4.0	8.0	3.0	42.0	**89.5**
- Small screen cinema offer	5.0	5.0	4.0	7.0	7.0	1.0	3.0	3.0	3.0	3.0	41.0	**88.0**

Self caterng accommodation uses have not been assessed as they are deemed to be inappropriate for the concept and site. NB there are plans for caravan related uses on neighbouring site.

4.4.5 The visitor experience

The scoring matrix is a useful tool as it enables different uses to be assessed and filtered to identify the most appropriate development option. Each use has associated costs and benefits which the scoring matrix above has helped to identify.

Based on the results of the scoring matrix and experience of comparator attractions and also taking into account the market assessment and client workshop we can begin to specify the offer. There is a need to balance the needs of the community and visitors.

Visitor centre

The proposed visitor centre will incorporate the following different spaces: a welcome entry point with interpretation, a flexible space which can be used to accommodate different user groups – from education groups, through to meetings and social functions and also act as a community space. It will be important to ensure that the space is divisible with folding doors to enable more than one activity to be run simultaneously. This should link to the cafe area as it will be important to be able to service large groups outside of core operating hours of the visitor centre.

A cafe of some 40 to 50 internal covers is likely to be a key driver of use and as such the offer should be a high quality experience. In the external environment, additional covers (30+) should be provided under some form of cover – perhaps a 'tensile sail' – linking directly to the cafe itself.

Creating a welcoming atmosphere within the cafe is key and this will be achieved through the staff but also the decor, lighting, furniture including soft furnishing and one option to consider is the introduction of a wood burning stove (helping to encourage usage during cold and inclement weather). 'Picture windows' offering long-distance views will be critical to help create a strong and positive first impression. More importantly they will offer views across the site allowing visitors (and management) to see activities taking place.

A wood burning stove adds to the atmosphere and the walls can be used to promote local artists

It is anticipated that general visitors will utilise the café facility to purchase a range of soft drinks and quality hot beverages with a variety of hot and cold snack foods (including daily specials). During the morning and afternoon periods the provision of good quality coffee and teas along with cakes would provide an important addition to the service. Child friendly menus will be an important element of the catering offer. Additionally, on Sundays consideration should be given to developing a quality 'Sunday Roast.'

Given the roadside location, breakfast is also a potential revenue generating opportunity and during the main season could be supplemented by serving adjoining campsite guests (if that proposal proceeds).

Another option to consider is the use of local produce. Sourcing local produce is becoming a key message for a number of catering operators to differentiate themselves in the market place. Traceability of produce and the use of seasonal ingredients are also becoming more important to consumers. This presents opportunities to work with local suppliers. Additionally, there is the opportunity to introduce a plot to plate scheme, whereby some produce is grown onsite in raised beds and used in the cafe kitchen.

At Hornsea Freeport Yorkshire local produce is actively promoted and Cawl at the Gower Heritage Centre

A kitchen garden has been planted at Gilbert White and the Oates Collections

Careful consideration will need to be given to the pricing points as it will be essential to engage with the local community but also passing traffic on the A539.

One further element is the introduction of a secure area for 'parking' buggies.

In the external space linked to the cafe (or within the wider site e.g. within the woodland) the introduction of a wood-fired pizza oven would add an additional income stream.


Adding to the visitor experience

We consider the potential mix of services would benefit from a liquor licence, (largely for wine and local bottled beers), particularly in respect of the function activities. A licensed unit will require a lockable storage room, separate from other stores, to meet the licensing requirements.

We do not believe the inclusion of a medium to large-scale paid for indoor play offer is justified due to the limited size of the core local residential market (a key driver of indoor play) and, during the peak tourist season, the ethos is around engaging with the natural/external environment. A low key, but high quality indoor play offer linked to the cafe would be a more appropriate use of space and is likely to reflect demand from the residential market place. The design of play needs to fit with the ethos of WILD and some elements of sand and water (similar to the Ice Cream Factory in Cheshire) and science play (eg. Eden project or Snibston (prior to closure)). The play experience can also incorporate indoor climbing elements which could prove an efficient use of space, add additional appeal and create an interesting spectacle for visitors (we have increased the budget for indoor play to £80,000 and increased the size to 60sqm).

It is interesting to note an old survey quoted by the Play Providers Association among their members which identified that "Only 50% of PPA members were showing a profit – the other 50% are reporting a net loss, break even or didn't reply to the particular question in the SOTI survey."

Building links with the wider community could be achieved by offering an opportunity for local producers including crafts and food items to be sold within the visitor centre. This retail offer would be served from a till point within the cafe itself and as such would utilise wall space to display the merchandise.

Visitor toilets include a baby changing space and subject to available budget consideration should be given to introducing a Changing Places Toilet[22].

Welfare space for staff and volunteers is often overlooked and this will need to incorporate an office space, welfare facilities for staff and volunteers as well as toilets/changing area.

There will be a need for a secure external service yard. Additionally, consideration should be given to accessing the visitor centre in terms of receiving deliveries and storing waste products and packaging.

[22] http://www.changing-places.org/the_campaign/what_are_changing_places_toilets_.aspx

Sustainable design is a key consideration in respect of the visitor centre and we set out as Appendix Four information on visitor centres which have incorporated elements of sustainable design.

In terms of the design of the visitor centre, consideration should be given to holding an architectural competition[23] with RIBA to create a signature building – although this could have significant cost implications to launch and manage the process.

We set out in section 4.4.6 an indicative schedule of internal areas.

External areas

The proposals for the Pocket Park already include a number of key external 'elements' of the visitor experience. These include:

- Natural play
- Accessible trails
- Tree coppicing area
- Car parking (34 spaces)
- Outdoor events facility
- Landscaping

These form the building blocks for the future of the WILD experience. This is beneficial as it helps to reduce the overall capital costs for funding purposes. It should be noted, not all of the elements set out in the Pocket Park proposal appear to have an allocated capital cost.

In addition, the scoring matrix has shown a strong fit for the following elements within the wider grounds:

The ethos would naturally lead to the creation of a unique play offer in the local and sub-regional market place. A bouldering area will allow visitors to try out a climbing activity onsite and along with an accessible viewing tower (developed on the proposed viewing area shown on the plans for the Pocket Park) will add to the critical mass of facilities onsite.

[23] https://www.architecture.com/competitions

Bouldering and a viewing tower which takes advantage of the long distance views

Along one of the proposed trails we recommend the introduction of play elements, which will encourage visitors to explore the wider site. The Forestry Commission have successfully introduced play trails at a number of their sites and at Wenffrwd, they could be themed upon a strong Welsh legend linked to an environmental message.

Elements of the play trail can take many different forms

High quality play is going to be a key driver of use outside of the Autumn and Winter periods and the current natural play proposed in the Pocket Park scheme could be extended to include provision for a more adventure type of play and a barefoot walk. The play offer could also incorporate water features to add to the excitement of the experience.


Play incorporating use of water

Barefoot walk at Conkers

It is recognised that innovative play, the Wolf's Den, has been introduced at Erddig and at Coed Moel a memorable nature play trail has been developed. The capital cost estimates include a significant budget for play elements and any play offer at WILD must match these high quality examples of good practice in the leisure sector.



Mud Kitchen and Willow Shelter

The key ethos will be to create an ‘accessible’ play environment.

Viewing / interpretation points with seating should be introduced at specific points along the proposed path on the southern boundary of the site.


Interpretation can be low key and engaging

Above a table in the Olive Tree Cafe at CONKERS showing a map of the National Forest. A similar approach could be adopted at WILD to promote the wider area. A distinct area where purpose built BBQs can be pre-booked and hired – this space could also incorporate a communal fire-pit area. These are becoming more popular in country parks and introduce a direct revenue stream.

Fire pit overlooking a waterfall in Sweden (Fulufjallet National Park)

A simple shelter which can be adapted for different uses and a board can be used to list recent sightings of wildlife

An outdoor shelter which could take the form of a 'wildlife' hut would be beneficial. Not only does this provide additional wet weather cover but also presents opportunities to interpret the wildlife onsite. It could also be used for 'story telling' activities during the summer periods and be used by education groups.

In terms of car parking it should be recognised that with staff and volunteers onsite this could take up to 20% of the proposed spaces associated with the Pocket Park.   With the additional elements proposed, visitor numbers will exceed the 5,000 forecasted for the proposed pocket park. Therefore, we would recommend increasing the number of spaces by 36 (to create 70 in total) to extend capacity and allow for passing traffic stopovers.

The use of signage

Clearly during peak periods there may be a need for overflow spaces and discussions should be entered into at an early stage with adjacent landowners.

Welcome entry point signage should also be introduced within the car park (along with a site map) and promotional roadside signage along the northern boundary.

Other considerations

Central to the project is to provide a space for learning and it is proposed that education groups will be an important target market. An education programme linked to the National Curriculum – targeting mainly at primary aged school children will be developed. WILD have indicated that programmes could include woodland art, den building, scavenger hunts, themed events based on popular books/films, team building exercises, STEM projects (using skills to design/build/test/evaluate). Bush-craft based activities (including shelter building, fire-lighting, camp-fire cooking, tracking and navigation, water filtration), team-building games and problem-solving activities, orienteering and tracking games can all be accommodated onsite.

WILD already runs a Forest School, with strong links to the community, and this will be an integral part of the learning experience. It should be recognised that 'learning' can be achieved through play, interpretation and events.


Events and activities

An annual calendar of events, programmes and activities will be an important part of the offer. It is likely that these events will be relatively low key – some will be free events whereas others will involve a fee (e.g. bushcraft skills). Events will either be delivered directly by WILD employees onsite or specialist third party providers. An activity plan to help develop an annual programme of activities and events can potentially be funded by the HLF. A successful programme of events is important as they help to:

- Encourage repeat visits and community involvement
- Build brand awareness
- Create PR opportunities
- Attract people who may not normally visit
- Generate income

It will be important to ensure that any third party event operators agree to abide by the 'brand guidelines' of WILD (in terms of operating and marketing) to ensure that the reputation of the operation is maintained.

There are likely to be opportunities for the wider activities programme to include multi-generational activities, volunteering opportunities, return to work programmes and other community focussed initiatives.

Where possible interpretation (discovery and storytelling) should be extended into the catering and events offers. For example, there will be stories to tell behind locally sourced produce within the cafe. The narrative could include interpretation of the World Heritage Site, the AONB and the history associated with Llangollen. There needs to be a clear focus in terms of interpretation. But it should provide reference to points of interest in the wider area. Externally trails and viewpoints should all support and reinforce the interpretive narrative. It is important to consider the medium which is used to tell the story from panels through to digital technologies. Specific funding can potentially be secured from the HLF to develop and implement an interpretation plan/strategy.

It is recognised that the project will be inclusive in terms of the Welsh and English languages. Additionally, it is important that a 'Welsh sense of place' is designed in from the start as part of WILD's marketing effort and the visitor experience itself in terms of signage, publicity, food, retail, activities, interpretation, events etc. This will help to further differentiate the offer in the minds of the visitor and help to build stronger links with the local community.

It would be difficult to create a fully 'immersive' welsh experience as found at specialist centres such as Nant Gwrtheyrn.

Our work does not include producing an Interpretation Strategy but one element to consider from a cultural perspective is to identify how the strategy can contribute to helping to promote 'Welsh Culture'.

Another opportunity to consider is the ability of WILD to deliver specific education-related activities through the medium of Welsh to specific groups. We understand there is growing demand for Welsh-medium education in the Llangollen area.

Additionally, in Denbighshire Countryside Services (including the AONB), WILD has a partner on the chosen site which is an exemplar in use of Welsh language and culture so joint development of the 'pocket park' and WILD facility makes product development as well as strategic sense.

4.4.6 Visitor centre – schedule of areas

We identify below an indicative accommodation schedule for the visitor centre, which is proposed for the development. It is not intended to be definitive but to form a framework for development by the project team and for cost purposes.

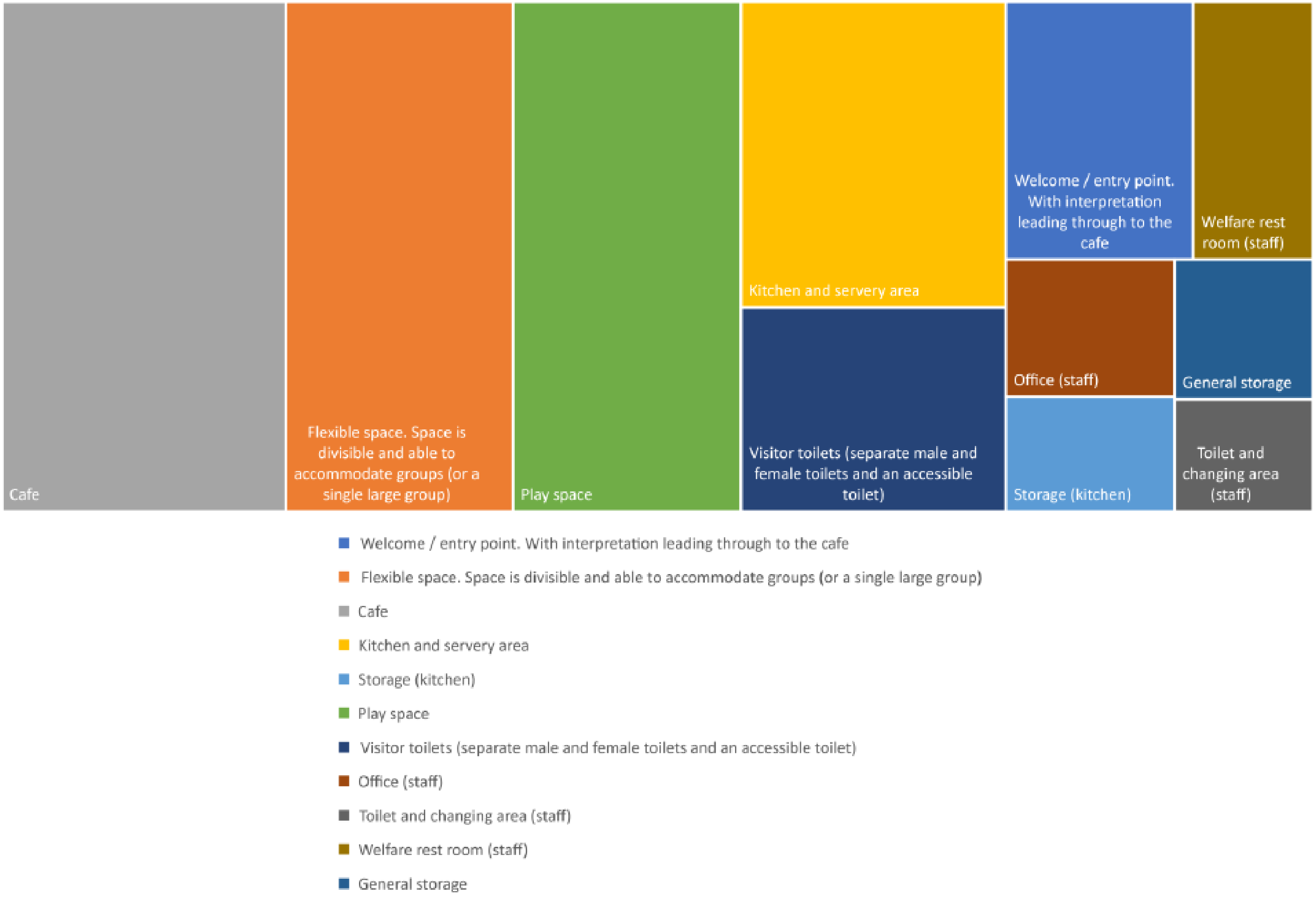
The proposed design could be a modular building, which will include core areas to accommodate specific activities with the potential of adding more space in subsequent phases (subject to cost, demand, planning, space etc.).

Visitor centre	Sq. M (indicative areas)
Welcome / entry point *With interpretation leading through to the cafe*	25
Flexible space *Space is divisible and able to accommodate groups (or a single large group)*	60
Cafe Main space (including retail wall) – (40 to 50 covers) Kitchen and servery area Storage Play space (high quality, low key)	 75 42 10 60
Visitor toilets (separate male and female	28

toilets and an accessible toilet)	
Staff Office Toilet and changing area Welfare rest room General storage	 12 8 16 10
Indicative total area	**346**

Please see indicative diagram below.

Indicative Size of Spaces Within the Visitor Centre



4.4.7 Indicative capital costs

We set out below a breakdown of indicative capital costs for the Pocket Park and the WILD concept.

Proposed costs of the Pocket Park[24] are as follows:

Item	Category of Expenditure	Estimated Cost (£) Excluding VAT
Clear scrub fences and hedges and chip and stockpile.	Site Works	£15,406
Entrance signage	Site Works	£750
Car park barrier and bollards	Site Works	£1,484
Drystone wall and fencing	Site Works	£7,480
Japanese knotweed management	Site Works	£5,200
Service road to be reinstated	Site Works	£61,480
Paths	Site Works	£27,740
Trees and hedgerows	Site Works	£1,615
Grassed areas inc topsoil	Site Works	£1,178
Wildflower planting and woodland edge mix	Site Works	£8,063
Car Park and access road	Site Works	£69,900
Car Park lighting, parking bays, markings, kerbs and splays	Site Works	£17,835
Prelims		£26,651
Professional Fees (15%)		£37,312
Total		**£282,094**

Please note that not all of the facilities shown in the Pocket Park concept sketch appear to be included within the above cost schedule. We have assumed that the above includes all landscaping as set out in the proposal.

24 Source: Welsh Government Rural Communities – Rural Development Programme 2014-2020. Application Form – Project Plan

Estimated capital cost (excludes services/infrastructure and subject to survey)	Mid range
Visitor centre (located on the depot site)	
• 319 sq.m .	£934,200
• Cafe covers, furnishings etc • Servery • Kitchen equipment • Limited retail space	£50,000 £25,000 £75,000 £3,000
• Fit out of main building	£221,250
• Indoor play (high quality, small-scale)	£80,000
• Office, front of house technology (tills and PC)	£15,000
• Terrace - area with external covers and tensile shelter linked to visitor hub. Architecturally led example would have a higher capital cost	£70,000
• General landscaping linked to visitor centre	£40,000
External elements	
• Bouldering area	£75,000
• Barefoot walk and wash facility	£80,000
• Play area incorporating water play	£240,000
• BBQ area with 4 BBQs and seating	£8,000
• Outdoor shelter	£15,000
• Viewing tower	£75,000
• Natural play	£20,000
• Play elements on existing trail	£40,000

• Pizza oven and associated seating	£8,000
• Interpretation (budget for external and internal areas – excluding trail)	£20,000
• Orientation signage on site	£5,000
• Picnic tables and seating	£5,000
Car parking	
• Extended onsite car park (36 additional spaces) and payment system	£78,000
Other	
• CCTV and alarm	£8,000
• Fencing	£15,000
• Secure yard (use existing)	£5,000
• Website	£7,000
• Enhanced entry and road signage	£6,000
• Secure bike storage	£2,000
Sub-total	£2,225,450
Professional fees @ 15%	£333,818
Contingency @ 15%	£333,818
Actual total (excludes Pocket Park costs)	**£2,893,085**

Note: Assumes Pocket Park goes ahead. Estimates are subject to site survey, preliminaries, input from a design team and QS. They exclude ground investigation, additional infrastructure/service requirements, the project team's staff costs to manage and deliver the project prior to opening and the link from the site to the towpath. We have assumed that the site is supplied by adequate services. Figures are net of VAT.

In terms of the investment programme we would suggest that some elements e.g. the bouldering area and viewing tower are introduced within Years Two and Three.

There may be opportunities for some cost savings when the Pocket Park is developed and it is recommended both the AONB and WILD work closely together at the design stage.

5.0 Financial considerations

5.1 Charging options

It is recognised that the WILD experience needs to be sustainable and generate income. We set out below a commentary on the different 'charging / admission options' to consider.

- **Free admission option** - not charging an admission fee will help to drive visitor numbers and will make the scheme accessible to people on low incomes. Some recreation sites attract a high number of visitors partly because they do not charge an admission fee (though a car parking fee can be levied).

- **Full admission charge** - to introduce a charge to enter the visitor centre and site itself there will need to be a significant number of elements/activities for visitors to interact with.

  Additionally, the overall site will need to be secured and fenced with a single-entry point. In our view we believe that it would be difficult to introduce an admission fee due to the proposed level of facilities available onsite. Additionally, introducing a full admission fee is likely to go against the ethos of the 'Pocket Park' and the ethos of making the site accessible to all.

- **Car parking charge option** - with the Pocket Park this will be an established process and also 'expected' in the minds of visitors. The AONB has introduced car parking charges at a number of their sites. This could be managed by a payment machine and daily inspections to ensure visitors are paying.

  In our view the continuation of car parking charges is the most appropriate way forward, albeit tariffs would be higher and linked to the dwell-time. The notion of a 'value for money' visit and open ethos of the Pocket Park (and WILD) is maintained and the suggested fees are relatively low.

  Clearly, this does not preclude charging for specific activities and events.

  In terms of increasing the proposed £1 car parking tariff for Pocket Park[25], it is important to communicate and inform visitors where their money is going.

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[25] Source: From the Welsh Government Rural Communities – Rural Development Programme 2014-2010 Application Form – Project Plan.

Moors Valley Country Park has introduced a number of signs to thank visitors and explain how the income generated from visitors helps to support the country park (please see photos below).

WILD in effect will represent the next evolution of the Pocket Park which will not have an admissions tariff – there will be a low car parking fee. We further believe that by introducing a full admission fee WILD will potentially damage the existing relationship with the local community who will be the users of the Pocket Park.

5.2 Visitor modelling

5.2.1 Internal and external factors impacting on visitor throughput

In considering the development of WILD, it is important to recognise that the future development proposals and corresponding visitor throughput and trading performance for the WILD experience are influenced by the following drivers:

External Factors

- The economy
- Market size and profile
- Tourism flows to the area
- Competitive position
- Political – (e.g. exiting the EU, funding sources)

- Local strategic priorities

Internal Factors

- Product - visitor experience (including events and activities)
- Price / perceived value for money
- Customer service
- Marketing and promotional activities, including social media

5.2.2 Forecasting visitor numbers

It has been forecast that the Pocket Park will generate approximately 5,000 visitors per annum. Below we apply a cautious penetration rate analysis to the residential, tourism and day visitor market places along with passing motorists. It is recognised there is some minor overlap between these markets. We have also made an assumption that a number of canal boat and tow paths users will visit WILD.

Year One – indicative visitor numbers

Market	Number	Penetration rate	Frequency to visit	Potential visitors
Residential market				
0 to 15 minutes	34,145	4.0	3.0	4,097
16 to 30 minutes	173,480	2.0	2.0	6,939
31 to 60 minutes	1,289,333	0.50	1.0	6,447
Tourism markets (Denbighshire)				
Staying visitors	1,498,000	0.60	1.0	8,988
Day visitors (beyond 1 hour)	4,456,000	0.20	1.0	8,912
Passing traffic				
Motorists / passing traffic	2,112,620	0.25	2.0	21,126
Others				
Existing Pocket Park users				5,000
Education			NA	900
Events			NA	900
Passing canal users			NA	1,500
Annual car parking pass	100		8.0	2,400
			Indicative total (Year One)	**67,209**

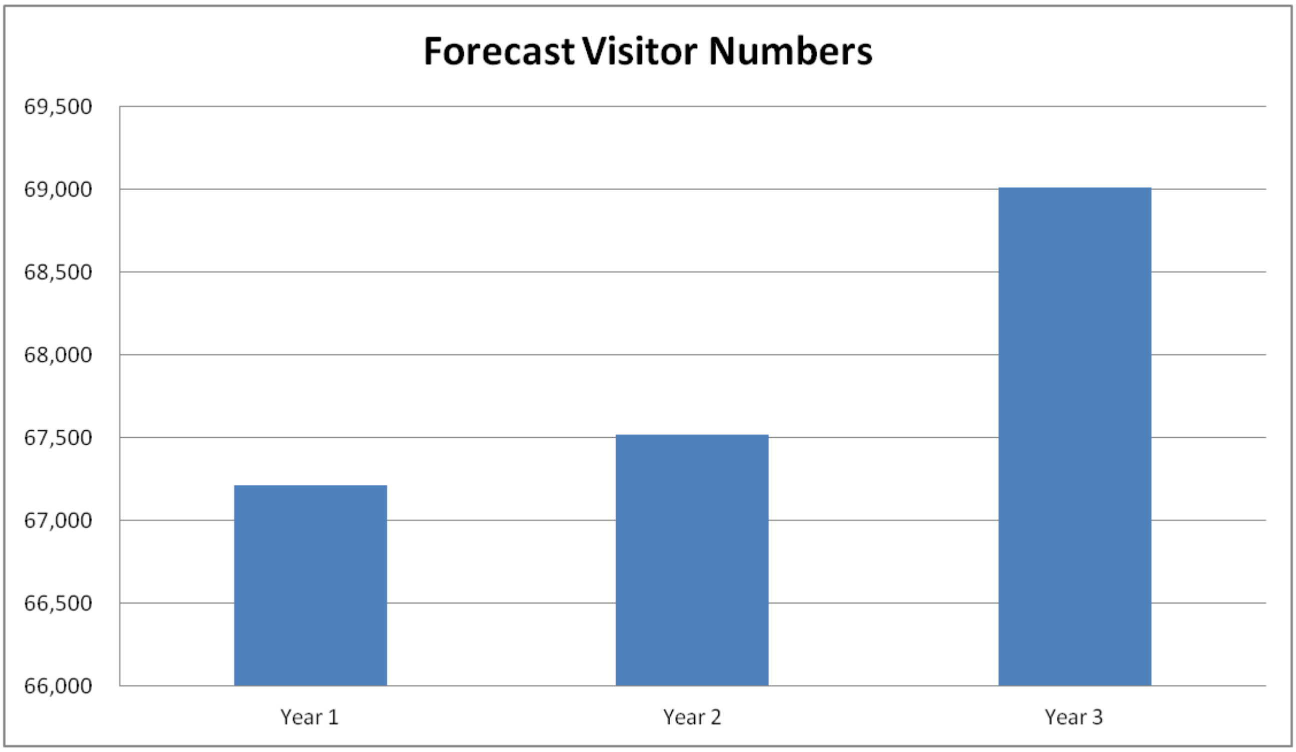
WILD is different to traditional visitor experiences and that a significant proportion of the visitor numbers (31%) are driven by passing motorists stopping for a refreshment or other break. **If these visitors are discounted, actual visitor numbers are approximately 46,000 people per annum.**

The visitor model takes into account the World Heritage Site (i.e. under tourism markets). Evidence suggests that a high percentage of visitors to the WHS, continue to Llangollen and stay in Denbighshire.

Due to financial pressures it is recognised that the education market is becoming increasingly difficult to engage with in terms of offsite visits, but we believe this is an important market to target as it is a core element of the WILD vision and concept.

Additionally we have shown a number of users directly drawn from the Canal and associated towpath.

The following chart shows the position of visitor numbers over a three year period.



5.3 Revenue projections

One of the key objectives for WILD is to aim to develop an operation that is cost neutral, i.e. where operational costs all staff, day-to-day running costs and maintenance expenditure are offset by income generated onsite. We set out below a three year trading profile.

Income	**Yr 1**	**Yr2**	**Yr3**
Car parking	49,732	49,176	59,566
Annual car parking pass	1,667	1,667	1,833
Catering	73,805	72,814	73,945
Catering passing vehicles	61,618	62,234	62,857
Evening catering	6,000	8,000	12,000
Room hire catering	4,108	5,477	6,847
Function catering	2,658	3,988	5,317
Event catering	2,963	3,259	3,585
Retail	56,008	56,263	57,506
Education visits	4,463	7,438	9,917
Room hire	5,900	8,200	10,500
Group BBQ hire	1,667	2,000	2,333
Events - holiday related	500	550	605
Events - calendar seasonal events	2,975	3,273	3,600
Events - third party (hire)	500	500	500
Donations	1,000	1,000	1,000
Total potential income	**275,563**	**285,837**	**311,910**
Staff costs			
Manager	25,000	25,500	26,010
Catering supervisor	22,000	22,440	22,889
Catering staff	52,903	54,520	57,592
Site ranger	18,000	18,360	18,727
Staff ranger team - sessional ranger during Easter, May and Summer Holidays	4,480	4,570	4,661
Casual catering	5,824	5,940	6,059
Casual staff	6,000	7,000	8,000
Cleaning staff	7,260	7,405	7,553
PT bookkeeper	3,120	3,182	3,246
PT marketing (incl. Social media)	10,000	10,200	10,404
Oncosts @ 15%	23,188	23,868	24,771
Total salary & wage costs	**177,775**	**182,985**	**189,913**
Cost of sales			
Catering @ 35%	52,903	54,520	57,592
Retail @ 50%	28,004	28,131	28,753
Room rental @ 10%	590	820	1,050
Group BBQ hire @ 40%	667	800	933
Events @ 50%	1,738	1,911	2,102
Total cost of sales	**83,901**	**86,183**	**90,431**
Gross profit	**13,886**	**16,669**	**31,565**

Operational costs			
Premises and grounds costs			
Site maintenance (grounds)	2,700	2,754	2,809
Buildings and equipment maintenance	5,000	20,000	30,000
Governance costs (Friends' organisation or similar body)	5,000	5,000	5,000
Rent payable to Council (tbc)			
Rates (tbc)			
Water (tbc)			
Energy	12,000	12,240	12,485
Insurance (est)	15,000	15,000	15,000
Miscellaneous premises expenditure	5,000	5,000	5,000
Sub total	**44,700**	**59,994**	**70,294**
Supplies and services			
Marketing - budget	15,000	16,000	17,000
Accountancy	2,500	2,500	2,500
Education materials	900	1,500	2,000
Car parking machine maintenance	1,000	1,000	1,000
Alarm contract	600	612	624
IT	1,000	1,500	2,000
Phone and internet	1,500	1,530	1,561
Health and safety	1,000	1,020	1,040
General refuse collection/waste	1,200	1,224	1,248
Postage/printing	500	550	600
Travelling and subsistence	1,000	1,000	1,000
Training	1,000	1,100	1,200
Uniforms	1,200	1,200	1,200
Bank charges	5,511	5,717	6,238
Exceptional costs in Year 1	10,000	-	-
Hire of equipment	1,200	2,000	3,000
Transport	4,000	4,000	4,000
Sub total	**49,111**	**42,453**	**46,212**
Total costs	**355,488**	**371,615**	**396,850**
Net position	**- 79,925**	**- 85,777**	**- 84,941**

Overall the model shows an annual deficit and the need for a subsidy in the order of £80,000 to £85,000 per annum. When other costs, such as, a sinking fund to refresh the visitor experience are taken into account, say £30,000 per annum, this will increase the deficit to approximately £110,000 to £115,000 per annum.

We have shown a sensitivity analysis below, whereby we have reduced passing motorists by some 20% from the visitor and financial model. As can be seen this small reduction in passing motorists has an impact on the bottom line and illustrates the importance of this market segment in terms of driving income.

	Yr 1	Yr2	Yr3
Total potential income	258,442	268,545	294,197
Total costs	344,112	360,125	385,240
Net position	- 85,669	- 91,579	- 91,043

It should be noted that there will be a need for borrowings prior to launch to fund project cashflow and pay for start up costs e.g. staff recruitment, salaries, marketing etc during the preopening period.

Income and costs

The income generated will principally be driven by visitor numbers to the WILD experience. In terms of income this is generated from the key areas as set out below.

I. Car parking
II. Catering (including 'dine-in nights' and catering income related to room hire, events and social functions)
III. Retail sales
IV. Education visits
V. Room hire
VI. Group BBQ hire
VII. Events and activities hosted onsite

Car parking

The breakdown of estimated dwell-times is shown below.

Dwell-time	%
Up to 2 hours	40.0
2 to 3 hours	30.0
3 to 4 hours	20.0
More than 4 hours	10.0

Tariffs including VAT are shown below. We have shown an increase in the car parking tariffs in Year Three. It is recognised that a proportion of passing motorists who purchase items in the cafe or shop not pay a car parking tariff (i.e. they receive the first 30 minutes for free but it is recognised that a number will stay longer than this and pay a car parking fee, particularly during the main holiday periods).

Dwell-time	Year One	Year Three
Up to two hours	£2.00	£2.50
2 to 3 hours	£3.00	£3.50
3 to 4 hours	£3.50	£4.00
More than 4 hours	£5.00	£6.00

This equates to an average tariff of £2.90 (£2.42 excl. VAT) in Year 1 increasing to £3.45 (£2.88 excl. VAT) in Year Three.

It is assumed that the majority of visitors will pay a car parking tariff, excluding school groups.

In respect of existing Pocket Park users (converted to WILD visitors) and people living within 20 minutes of the site it is assumed 80% will pay the parking tariff (i.e. they walk to WILD or stay for less than 30 minutes). Some 25% of passing motorists who stop will pay the parking charge (the remainder will stay for less than 30 minutes and not pay).

There is also an annual car parking pass @ £20.00 per annum (£16.67 net of VAT).

Catering

General catering – is based on an average income per head of £2.00 (£1.67 net VAT). Cost of sales are set at 35%. We have assumed that passing motorists are likely to have a higher average spend level of £3.50 (£2.92 net of VAT) and this is reflected in the model.

Evening catering – during the peak periods it is assumed that the cafe is open over 6 nights during Year One increasing to 12 nights in Year Three where people can pre-book with an average of 60 covers per night @ £20.00 per head (£16.67 net of VAT).

Catering related to room hire and social functions and events is shown.

Catering cost of sales are set at 35%.

Retail

Retail – is based on an average spend per head of £1.00 (£0.83 net of VAT). Cost of sales are set 50% of retail income.

Education

Education visits are based on a tariff of £5.95 per child (£4.96 excluding VAT) and are set at a reasonable level of 900 in Year One increasing to 2,000 in Year Three.

Room

Room hire is based upon an average of 6 hours of hire per week @ £12.50 per hour in Year One (representing 3 hires) increasing to 10 hours per week by Year Three.

We have also assumed hire of the visitor centre for four occasions per annum @ £500 per hire in Year One increasing to eight occasions in Year Three to host social functions / wedding receptions. This would be outside of the core operating hours).

Events

We propose three types of events:

- Low key activities which are run during Easter Holidays, May Half Term and Summer school holidays. For example, bushcrafts, mini-beast hunting, Easter egg hunts. These would be targeted at visitors already onsite and would be delivered by freelance rangers on a sessional basis (ideally employing local students returning from university). These would have a nominal charge.

- Calendar type of events – for example, a Halloween and Winter Wonderland experience which could generate some 600 additional visits. Clearly on these occasions car parking could be an issue and may be a need to agree an overflow space with the adjacent landowner

- Ad-hoc third party events – whereby the site is hire by a third party to host evening events at £500 per event. We have shown one hire during Year One.

Group hire of BBQs

BBQ hire is based upon an average of 50 hires per annum @ £40 per hire, which are likely be concentrated during the summer period. Cost of sales are set at 40% of income (to cover BBQ fuel and also staff time to set up and clean down).

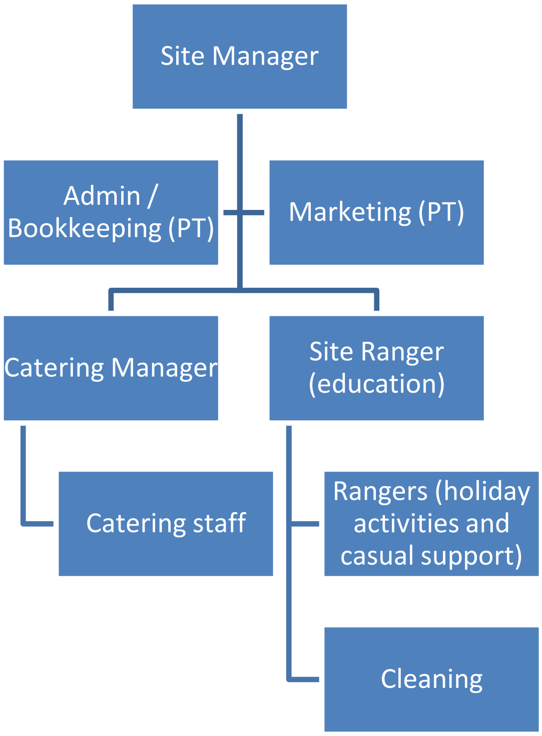
Donations

Are set at a modest £1,000 per annum.

Staffing

Staffing is allocated as follows:

- Site Manager
- Catering supervisor
- Catering staff are set at 35% of catering turnover.
- Site Ranger (education delivery including outreach, the ranger can also assist with site maintenance)
- P/T Bookkeeper / Administrator to keep the books but also to act as an administrator for event and education bookings along with the day-to-day administration of operating the business.
- P/T Marketing specialist based on 2 days a week
- Sessional ranger staff to run engaging activities over the Easter, May Half Term and Summer holiday periods and provide casual support.
- Cleaning staff
- There is likely to be a need for casual staff during peak periods



Other costs

Preventive, annual and periodic maintenance costs are related to the upkeep of the building, equipment (internal and external) and the grounds and we allocated an annual cost for this (please note there is an additional allowance in Year Three)

Marketing is set at £15,000 in Year One.

Insurance is estimated at £15,000 per annum.

Accountancy fees are £2,500 per annum

Utility costs of £12,000 per annum

Please see table above for other costs. Please note rates and water costs are to be confirmed. Additionally, we have shown a line for rental payable for the site and this figure is to be agreed.

Operational consideration – car parking (barrier system)

It is recognised that the total car parking spaces are set at 70 (this builds on the original allocation set out in the Pocket Park proposal). The model in Year One assumes some 25,000 vehicles parking at the site. If we assume the site is open 363 days per annum there are some 25,410 spaces available. If we further assume there are just over 2 turns per day this increases the number of car parking spaces available to over 50,000 per annum. On peak days there will be a need to reach an agreement with the adjacent landowner to secure additional car parking spaces.

5.4 Wider impacts

High quality visitor experiences have a direct impact on people's lives and they become personally attached to places that give them enjoyment and social benefits through recreation with family and friends.

From an environmental perspective the Ecosystem services[26] model as shown below helps to summarise the wider benefits of the WILD project.

[26] Ecosystem services classification used by the UK National Ecosystem Assessment.

Provision-ing Services	**Food**: Ecosystems provide the conditions for growing food (perhaps with a plot to plate scheme).
	Raw materials: For example, timber to construct furniture and wood fuel.
	Wild species diversity: Ecosystems provide everything that an individual plant or animal needs to survive.
Cultural Services	**Recreation:** Accessible greenspace offers an opportunity for recreation, learning and engage with nature etc. which influences physical health.
	Aesthetic Values & Sense of Place: People benefit from a view on beautiful landscapes which also improves mental health.
Regulating Services	**Climate regulation:** On the one hand vegetation captures and stores carbon; on the other hand, it mitigates extreme high temperatures in urban settings.
	Moderation of extreme events: Ecosystems create buffers against natural hazards such as flooding events.
	Water and air quality improvement: Micro-organisms and plants remove and decompose pollutants from air and water bodies.

It is clear that WILD has the potential to provide users with an accessible and attractive destination with opportunities to engage and improve:

1. General health and well-being inclusive of everyone, irrespective of physical or mental ability[27]
2. Lower perceived physiological stress levels
3. Quality of life
4. Relationships with families and friends

[27] Research commissioned by the Land Trust identified that "9 out of 10 people feel that our green spaces play a positive part in their happiness and wellbeing.... For every £1 spent P.A. by the Land Trust, society benefits on average £30.30 in health care provision because people using our sites feel fitter and healthier" (The Land Trust – The Value of Our Green Space, January 2016).

5. Local identity, a sense of place and sense of community
6. Levels of physical activity that meet UK health recommendations
7. Enjoyment of nature
8. Cultural activities
9. The delivery of formal and informal educational
10. Perceptions of the environment and nature

Specific economic impacts include the annual employment generated by the project during the operational phase which equates to an annual wage roll of £178,000 in Year One.

There are the purchases of supplies and services by WILD in order for the attraction to run as a business and these total approximately £177,000 in Year One. Additionally, there is spending by staff and those members of staff employed by suppliers. Clearly, the spending by staff in the local area helps to support local jobs and firms can invest to cope with additional demand of their services.

As part of the operational procedure, where appropriate, there may be a policy which emphasises the importance of purchasing services and supplies locally.

During the construction phase there are also economic benefits from the employment of staff and through the purchases of services / goods by contractors and sub-contractors.

6.0 Project considerations

6.1 Risk assessment

Risk is a basic key factor for consideration in respect of the development of new visitor experiences. Reduction in income, budget overruns, environmental damage and political disagreement are among the many factors that can create problems. Set out below are the key risks associated with the WILD project, probability of the risk, the potential effect or impact and how to mitigate against the risk. For ease of reference these are considered under the following headings:

- Economic
- Legal
- Development
- Market
- Operational management

6.1.1 Economic risks

Risk number	Nature of risk	Probability of risk	What effect could this have?	How to deal with risk
E1 (i)	Repeat of downturn in economy	M	Reduction in day trips. Visitor experience sector hit because less money spent on days out and in overnight stays in Llangollen.	Reviewing car parking and admission policies. Emphasis on WILD representing a low cost/value for money experience
(ii)	Increase in interest rates	M	As above	As above
E2	Uncertainty for visitor economy surrounding UK leaving the EU	M	Visitor experience sector hit because less	Emphasis on WILD representing value for money (but delivering a high quality experience)

	(although early signs paint a positive picture in respect of overseas tourists visiting the UK)		money spent on days out although there is potential for UK based days out sector to grow	
E3	Uncertainty around funding in respect of UK leaving the EU Funding regime changes at a national / local level	M/H M	Decrease in European funding sources impact on project deliverability Project deliverability is impacted	Identify and secure funding prior to development Monitor situation
E4	Repeat of fuel crisis / increasing fuel costs	Currently L (over time probability likely to be M)	Temporary reduction in leisure travel and usage from any potential day visitors	Make sure marketing literature refers to ease of access by bus/foot/cycle (and Canal). Offer incentives to visit via bike/foot/public transport

6.1.2 Legal and strategic risks

Risk number	Nature of risk	Probability of risk	What effect could this have	How to deal with risk
LS1	Non compliance with laws and regulations	L	Disruption to visitor offer	Ensure operation complies with all legislation - following best practice
LS2	Issues around contractual arrangements with	L	Operational and financial e.g. project not	Ensure detailed review of contracts / leases with any third

	any third party partnerships		taken forward	party operators. Legal advice is currently being sought
LS3	At a local level a specialist opposition or pressure group emerges and opposes the plans for the WILD Project	L	Delay in opening or project not taken forward	Ensure local engagement is carried out (project already has support from local community and Town Council)
LS4	Covenant issues identified which prevent development going forward	L	Development not taken forward	Engage specialist legal advice to ensure proposed development plan is achievable
LS5	Conflict of interest with role of Local Authority	L	Forfeiture of lease	Engage specialist legal advice
LS6	CIC (or similar body) does not comply with relevant rules/regulations	L	Project delay or possible period of closure	Engage specialist legal /accountancy advice prior to set up
LS7	Not reaching an agreement between WILD and Council	L	Project not taken forward	Start early engagement
LS8	Strategic priorities not being met by project	L	Leads to breakdown in relationship with County Council	Ensure project meets strategic priorities. Early liaison with project partners

6.1.3 Development risks

Risk number	Nature of risk	Probability of risk	What effect could this have	How to deal with risk
D1	Planning refusal	UNKNOWN	Rejection of Planning Permission for proposed WILD experience (the WILD team are engaging with the local planning department)	Early and ongoing consultation with planning authority. Importance of showing financial feasibility of project
D2	Unforeseen increase in capital costs (possibly through undiscovered risks, project delays and technical/ geo-technical problems)	M	Increased cost to client, delay in project	Use of specialist quantity surveyors to identify full capital costs and ensure all costs are 'fixed' in respect of tender contracts (with fully detailed design at start). Project team to commission appropriate studies prior to any building work
D3	Delay in securing funding (either funding, borrowings or other)	M/H	Delay completing work programme, impact on opening, creating negative PR	Invest time in fundraising; develop detailed fundraising plan; prepare high quality bids to potential funders; set realistic SMART parameters

D4	Development of the WILD concept is delayed	M	WILD does not open as programmed, public loses faith in the project leading to negative perception of the experience	Manage public expectations, set SMART objectives for building projects, use media, events and personal contacts to keep local interest informed, set realistic work timetables. Ensure the project has clear objectives and a management structure – responsibility must be clear so that decisions do not get delayed during construction
D5	Breakdown in relationship with contractors / contractor defaults / major breach of health and safety	L	Delay in opening and resultant impact on income generation	Ensure early market engagement and appointment of experienced project manager
D6	Unforeseen construction problems e.g. inclement weather	M	Delay in opening and resultant impact on income generation	Avoid starting work in winter if possible
D7	Damage to environment/habitats during construction (currently low value)	L	Negative PR, site characteristics / special qualities impacted on	Prior to construction identify strategy to mitigate potential environmental impacts
D8	Delays in establishing 'mature' attractive	L	Site remains unattractive and	Existing proposal to start landscape

	landscape		difficult to market	works in March 2018 (as part the Pocket Park project)
D9	Access improvements required not implemented	L	Development taken forward in reduced scale (or not taken forward)	Will be settled prior to development (two separate planning applications from adjacent landowner and AONB)
D10	Insurmountable technical problems	Unknown	Project not taken forward	Work being commissioned by WILD to identify early on if any technical issues are insurmountable
D11	Canal bank collapses leading to flooding of site	L	Project not taken forward or delay	Need to ensure proper site surveys completed prior to construction phase

6.1.4 Market

Risk number	Nature of risk	Probability of risk	What effect could this have	How to deal with risk
M1 (i)	Increased competition from existing providers **(unknown risk in respect of Trevor Basin proposals)**	H	Reduction in throughput and income levels	Develop strong brand identity and invest in marketing to raise awareness of WILD (including pre-opening marketing). Monitor market place
(ii)	Competition from new market entrants	M	As above	As above
M2	Decline in market for outdoor experiences	L	Reduction in usage. This impacts on car parking income	Introduce new marketing initiatives and reinvest in product to broaden

			and viability of project	appeal

6.1.5 Operational / management

Risk number	Nature of risk	Probability of risk	What effect could this have	How to deal with risk
OM1	Insufficient marketing carried out prior to launch of new WILD visitor experience to build awareness (and post opening)	M	Launch and subsequent throughput not met	Ensure adequate budget and resources are set aside to market the enhanced offer to raise awareness prior to opening and during the post opening period
OM2	WILD represents poor value for money	L	Lower number of repeat users	Explanation of how investment in WILD provides value for money and justifies car parking charge
OM3	Foot and Mouth or outbreak or other disease	L	Project faces temporary closure	Ensure best practices are introduced. Also ensure marketing action plan can respond to any crisis
OM4	Vandalism & security	L	Damage, delays, increased insurance, repairs and maintenance and other costs. Reduced staff morale and impact on visitor experience	Advice from local police and specific community work targeted at local community, keep community on board via building strong community relations and creating local 'ownership' of facility. WILD team already

				have developed community links.
OM5	Negative publicity	L	Discourages people from visiting the facility	Use existing DCC / AONB Marketing / PR officer to work with local media to build on existing community support
OM6	Wet weather (reliance on good weather)	M	Decrease in visits and impact on viability	Develop marketing message to promotion all 'new' visitor experience
OM7	Health and safety compliance	L	Create negative publicity and potential closure	Develop health and safety policy - include annual inspections. Project benefits from DCC and AONB's own experience of managing other sites
OM8	Consistent experience not achieved across all elements of the visitor experience at WILD	M	Impact on perception and actual experience. Decrease in repeat visits	Training and operational programme provided to all members of staff
OM9	Increased operational costs (costs not controlled)	M	Project becomes financially unviable	Identify areas for cost savings
OM10	Not achieving spend levels	L/M	Increased revenue support required	Consider targeted marketing campaigns. Assess cost base to ensure target margins are met
OM11	Catering – inability to effectively convert visitors to catering sales	L	Significant impact on potential for catering to	Ensure menu offer and style of service/offer matches market need

			generate income	
OM12	Maintenance problems	L	Creates bad publicity, loss of faith in project and increased costs	Careful consideration during design stage of materials used and design of built facility. Secure adequate maintenance budget
OM13	Increasing energy costs	M	Higher operating costs.	Examine pricing structure of energy supplier(s). Consider introduction of sustainable energy sources e.g. wind/solar/ground source at outset of design of any built facilities. Aim to ensure energy costs benefit from wider bulk purchasing arrangements of DCC and/or AONB
OM14	Lack of direct operational experience of core team	M	Negative impact on visitor experience	Recruit experienced manager and staff. Also consider setting up 'advisory board' of experts
OM15	Not being able to secure overflow parking on specific days	M	Some events may not be able to run	Engage with adjacent landowner to discuss requirements.

6.2 Development

The development team will need to consist of the following professionals/organisations:

Project Board

- WILD
- Cadwyn Clwyd Cyfyngedig (Cadwyn Clwyd)
- Clwydian Range & Dee Valley Area of Outstanding Natural Beauty
- Denbighshire County Council
- Key responsibilities: fund raising, financial management, procurement, project management and delivery. Will need input from legals.

Project Management

- Project Manager

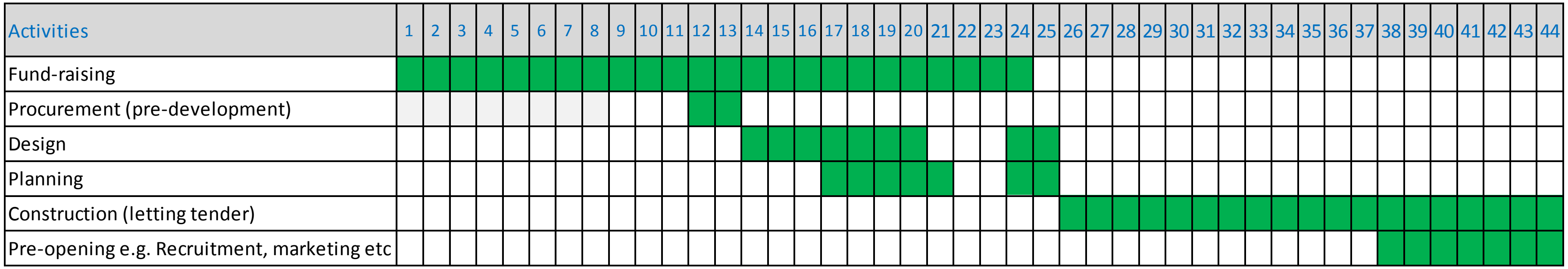
Design team

- Architect
- Landscape architect
- Planning specialist
- Engineers
- QS
- Interpretation planner
- Activity Planning

Build team

- Contractor
- Sub-contractors

We set out below an indicative development timetable (by month).


Activities
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44
Fund-raising
Procurement (pre-development)
Design
Planning
Construction (letting tender)
Pre-opening e.g. Recruitment, marketing etc

6.3 Funding

We have listed below the most likely and eligible sources of external funding support for the project as developed through the plan with web links to access greater detail. While many funders are able to offer support for both capital and revenue activities, most of the latter will necessarily be project based and most funders specifically exclude the ongoing support of core running costs. It will be important therefore to keep the latter to a minimum in budgeting and accounting terms while identifying a series of short to medium term projects to help deliver the initial development, ongoing enhancements, activities (eg learning and play) and events.

It is likely that WILD will need to assemble a mosaic of funding sources both to develop and operate the project, which will require careful planning in terms of sequencing and matching once any decision to go ahead has been taken. Some funds are mutually compatible e.g. government and lottery.

In terms of eligibility we have assumed that WILD (or any alternative vehicle organisation created to deliver and operate this project) will be fully constituted with its own bank account and a legally recognised form of governance. We note that WILD currently favours the **Community Interest Company** model but there are others that might also be suitable in terms of providing robust governance while still offering wider community 'buy-in' especially in terms of fulfilling WILD's objectives in respect of learning, family support, community development, environmental improvement etc:

- Company Limited by Guarantee
- Charitable Incorporated Organisation (Association or Foundation)
- Charitable Trust
- Cooperative

While achieving Charitable Status is not straightforward, (and getting harder with ongoing scrutiny to match), it can have advantages as a range of Charitable Trusts, who could offer revenue or capital support, will only donate to other organisations with clear charitable purposes. The activities which WILD seeks to pursue are included in the list of charitable purposes approved by the Charities Commission. Charities may also have more chances of attracting sponsorship from private sector enterprises looking to discharge corporate social responsibility.

One example of lending is included in the table below. If lending is needed to bridge a funding gap (including working capital) there are both commercial and, increasingly, peer-to-peer lending options available for incorporated organisations eg Zopa www.zopa.com , or Funding Circle www.fundingcircle.com which specialises in Business Loans. Peer to peer lending works as follows: lenders place their money with a peer to peer platform which is then lent to lots of different borrowers as many small loans. Each borrower borrows small amounts from many different lenders to make up the full loan they need. The platform will collect the repayments of interest and capital from each borrower and pass them to the lenders.

For community-based projects there is also the option of community share or bond schemes where either:

- Small equity stakes in the project are sold to local stakeholders and residents to raise initial capital or
- Bonds are sold in a similar way to raise loan funding with a guaranteed return after say 5 or 10 years

These are more sophisticated than the 'buy a brick' type sponsorship schemes used by many community and charity projects, although many will regard their 'investment' as a donation to a worthwhile community asset, with no expectation of a commercial return. Once again such schemes offer a practical opportunity to achieve 'purchase' in the wider community. More information can be found at http://communityshares.org.uk and http://www.communityplanning.net/pub-film/pdf/CommunityShareAndBondIssues.pdf

WILD PROJECT: Funding Support Table

Funder	Fund	Loan/ Grant	Capital/ Revenue	Objectives	How Much	Application Deadlines	Conditions/ Comments
Visit Wales (Welsh Government)[28] https://businesswales.gov.wales/zones/tourism/tiss	Tourism Investment Support Scheme	Minimum 30% of award is repayable (subject to achieving turnover targets)	C only	• Meet objectives of Partnership for Growth • Create and safeguard jobs • Deliver quality, innovation and sense of place Brand 'tests': • Surprise and inspire • Change perceptions • Be unmistakably Wales • Elevate our status	25k to £500k (25% of total eligible project costs or 40% salary of fte jobs created)	None decision in 8 weeks	Favoured priorities: High end serviced and s/c accommodation, destination restaurants, spa and meeting facilities, **attraction and activity products**
Visit Wales (Welsh Government) https://businesswales.gov.wales/zones/tourism/tiss	Micro Small Business Fund (MSBF)	G	C		£25k to £500k (40% of total project cost or £10k per job created)	None Decision in 8 weeks	Priorities and process as per TISS

[28] VW Revenue support schemes Regional Tourism Engagement Fund (RTEF) and Tourism Product Innovation Fund (TPIF) have closed for 2018/19 with no indication if/ when they will re-open. In each case these are project based and will not support core organisational running costs

				• Do good things			
Visit Wales (Welsh Government)/ EU https://businesswales.gov.wales/zones/tourism/finance	Tourism Amenity Investment Support (TAIS)	G	C	P4G priorities especially 1. Product Development, (Driving a product-led approach and supporting high quality reputation-changing products) 2. Place Building (Developing Destinations that people want to visit and recommend to others) • Promote social inclusion, poverty reduction and economic	£25k to £128k (max 80% of eligible costs)	Annual call - 2018 date to be confirmed (May - June ?)	Priority will be given to projects identified in **Destination Management Plans**. Support is for 'public realm' and **not-for-profit projects** NB Funding is derived from EAFRD Rural Community Development Fund so only rural wards are eligible

				development in rural areas • Help those most deprived in rural Wales and those that have limited scope to change their circumstances • Develop the resilience and capability of rural communities so that they are better able to cope with and adapt to change			
Welsh Government/ EU http://gov.wales/topics/environmentcountryside/farmingandcountryside/cap/ruraldevelopment/wales-rural-development-	Rural Community Development Fund	G	C	RCDF has three main objectives: 1. Promote social inclusion, poverty reduction, and economic	Up to £128k (max 80% of eligible costs)	2 per year. Next is 5th April to 7th June	2 stage process (EOI then full application) **NB Tourism Projects will be referred to TAIS (see**

programme-2014-2020/rural-community-development-fund/?lang=en				development in rural areas 2. Help those most deprived in rural Wales and those that have limited scope to change their circumstances 3. Develop the resilience and capability of rural communities so that they are better able to cope with and adapt to change. Eligible Activities (inc) • Support for studies and investments for maintenance, restoration and upgrading of		2018	**above)**

				cultural and natural heritage • Support for investments in the setting-up, improvement or expansion of local basic services for the rural population including leisure and culture, and the related infrastructure			
Heritage Lottery Fund (HLF)[29] https://www.hlf.org.uk/looking-funding/our-grant-programmes/sharing-heritage	Sharing Heritage	G	C/R	Outcomes for people: With our support, people will have: • learnt about heritage • developed skills	£3k to £10k up to 100%	Open call	Project to be completed in 1 year Match funding in cash/ kind inc volunteer time
HLF	Our Heritage	G	C/R		£10k to	Open call	Project to be

[29] HLF Grant Framework overall is changing in 2019 (emphasis will be on organisational sustainability)

https://www.hlf.org.uk/looking-funding/our-grant-programmes/our-heritage				• changed their attitudes and/or behaviour • had an enjoyable experience • volunteered time Outcomes for heritage: With our support, heritage will be: • better managed • in better condition • better interpreted and explained • identified/recorded Outcomes for communities: With our support: • negative environmental	£100k up to 100%		completed in 3 years Match funding in kind inc volunteer time
HLF https://www.hlf.org.uk/looking-funding/our-grant-programmes/heritage-grants	Heritage Grants	G	C/R		£100k to £1m up to 95%	16th August 2018 for decision in Nov or Dec 2018 2 stage process	Project to be complete in 5 years Match funding in cash/ kind inc volunteer and staff
HLF https://www.hlf.org.uk/looking-funding/our-grant-programmes/heritage-grants	Heritage Grant	G	C/R		£1m to £5m up to 90%	14th June for decision in Sept 16th August for decision in Dec 2018	Project to be complete in 5 years Match funding in cash/ kind inc. volunteer and staff

				impacts will be reduced • more people and a wider range of people will have engaged with heritage • your local area/community will be a better place to live, work or visit • your local economy will be boosted • your organisation will be more resilient			
Big Lottery https://www.biglotteryfund.org.uk/funding/programmes/national-lottery-awards-for-all-wales	Awards for All	G	C/R	'Working together, people and communities will use their strengths to make positive impacts	£300 to £10k	Open call	Short term projects

Big Lottery https://www.biglotteryfund.org.uk/funding/programmes/people-and-places-medium-grants	People and Places	G	C/R	on the things that matter to them most' • bring people together and build strong relationships in and across communities • improve the places and spaces that matter to communities • enable more people to fulfil their potential by working to address issues at the earliest possible stage.	£10k to £100k	Open call	Projects funded up to 5 years Essential that community is involved in the project design and development
Big Lottery https://www.biglotteryfund.org.uk/funding/programmes/people-and-places-large-grants	People and Places	G	C/R		£100k to £500k	Open Call	Projects funded up to 5 years Essential that community is involved in the project design and development
WCVA (on behalf of WG) https://www.wcva.org.uk/about-	Landfill Disposals Tax Communities	G	C/R	• **Biodiversity**- conservation and promotion of a	£5k - £50k	Scheme to be launched	NB Not yet clear whether WILD location will

us/news/2018/02/landfill-disposals-tax-communities-scheme	Scheme			specific species or a specific habitat where it naturally occurs. • **Waste minimisation**- promote awareness and best practice to reduce the amount of waste produced • **Wider environmental enhancements**- bring wider community benefit through improving quality of place.		in Spring 2018	qualify (depends on proximity to landfill sites and/ or transfer stations) but would be an important symbolic funder in view of previous use of site
Clwydian Range and Dee Valley AONB http://www.clwydianrangeanddeevalleyaonb.org.u	Sustainable Development Fund	G	C/R	**The fund supports projects which will:** • conserve and enhance the	50% (but up to 75% for voluntary groups)	Scheme for 2018/19 yet to be	Small-scale project support (AONB only has limited overall

k/the-sustainable-development-fund/				natural beauty of the AONB, including the built environment • promote sustainable forms of social and economic development • promote the economic and social well-being of local communities • promote quiet enjoyment of the AONB **Priority is given to projects which:** • involve local communities and young people • lever in contributions from other sources in		opened	amount to distribute)

				cash or in kind • overcome barriers to sustainability and promote a wider understanding of sustainability • promote sustainable forms of social and economic development or add value to existing sustainability projects • raise awareness of the AONB and generate jobs or income for communities, without damaging the landscape • demonstrate			

				innovation or best practice			
Banc (Development Bank of Wales) https://developmentbank.wales	Business Finance	L	C/ R	Business Start Up and Growth	£50k to £2m on flexible and bespoke terms (Typical interest rate 7.3%)	Ongoing	Banc also prepared to take equity stake in businesses

Allocation of funds from commercial development - (S106/CIL)

Planning agreements can be used to ring-fence capital funding. The strength of this approach is that it can provide a significant injection of capital which is secured at the outset. However, the funding is susceptible to competition from other types of infrastructure projects and there is a high level of risk that the project may not secure funding from S106/CIL. S106/CIL could help in terms of match funding or 'pump-priming' finance.

Endowment model

The endowment model relies upon major capital investment from which the interest generated is used to help support the long-term management and maintenance of buildings/sites.

The National Trust has successfully developed the endowment model in terms of protecting the long-term future of a number of their sites. The Land Trust has also used this model.

Endowments are difficult to set up by local authorities as a multi-million investment package may not win the hearts and minds of voters particularly in this period of austerity.

However, with the correct investment programme they can be used to provide long-term and relatively stable financial support – (unlike non-statutory local authority funding which is not ring-fenced).

It is interesting to note the example recently established in Scotland. In Spring 2017 'Greenspace Scotland' received a grant from the Heritage Lottery Fund to establish the development of an Endowment Fund for Scotland's parks. The HLF grant of £500,000 aims to develop an investment endowment fund of at least £1million. It is the first step towards an ambition for a multi-million endowment fund which will help to keep Scotland's parks in good 'health' for future generations to enjoy. The funds will be invested to provide an endowment to support Scotland's parks in perpetuity. The fund will be matched with donations from individuals, businesses and trusts to raise the initial one million pounds target.

Legacy funding and donations

The National Trust is successful in attracting people to leave legacies to the Trust.

Bournemouth Parks Foundation launched in 2015 is encouraging people to leave cash legacies in their will.   For their Aviary project they have raised £40,000 from donations – 50% based upon donations of £1 and the remainder from larger sums.

Clearly, the growth in digital technology from a technological standpoint, it would be relatively easy for WILD to introduce an 'online button' to increase the level of donations received (assumes a website is live). This could be linked to specific projects e.g. if you donate £10 this will help plant a tree etc.

Crowd funding

Crowdfunding is a relatively new approach to generate capital funds to take forward projects. Services such as Kickstarter have been used to launch a number of high profile projects. Interesting to note in New Zealand, members of the public have 'crowd funded' the acquisition of a pristine, seven-hectare stretch of coastline from a private owner including the beach at Awaroa.

Over 39,000 pledges of money to take the project forward were received, which equates to over NZ$2 million. We understand the Government has also made a financial contribution towards the project.   Please see: http://www.telegraph.co.uk/news/2016/07/11/new-zealands-crowdfunded-beach-becomes-public-park/

Levy on new housing

A further option could be the introduction of a levy on new housing development which lies within a specific distance of WILD (the Council would have to remain a major partner of WILD). The Land Trust has introduced a 'service charge' on some 1,000 homes at Upton in Northampton which is used to manage the green spaces and play areas.

In terms of funding, apart from the issue of eligibility, there are a number of fundamental factors that need to be addressed in terms of identifying and sourcing external funding for future development opportunities across the Estate. In respect of individual projects to enhance individual sites:

- What is the level of the funding gap?
- Who is going to lead any application for external funding?
- Who is going to be accountable for the use of funds?

- Is there any match funding to support a funding bid?

- What are the likely outputs to be delivered by the scheme?

Other

There are numerous grant/funding bodies, including, for example:

- The Andy Fanshawe Trust which focuses on supporting projects which help disadvantaged young people to develop an interest in the outdoors (recreation/activity focus). Given the potential location of WILD, links with local activity providers and links to the wider countryside this presents a potential opportunity.

- The ASDA Foundation supports registered charities and local not-for-profit organisations. Projects supported include The Canolfan Pentre where ASDA have supported the centre – please see: https://www.canolfanpentre.org/news/2018/1/30/60z75tg0o818aojg3mepan41c3w5sh

- Esmee Fairbairn Foundation made £49.1 million of grants in 2016 (of that £5.7 million was dedicated to environmental projects). One of their funding priorities is: "Connecting people with nature and environment issues."

- The Greggs Foundation, the Environmental Grant fund is "dedicated to improving the local environment - whether that means turning a piece of wasteland into a garden or organising litter picking days on the beach. We look to fund projects that improve the physical environment in a way that also benefits the wider community. We have seven local charity committees which meet regularly throughout England, Scotland and Wales to review applications and award grants."

- The Oakdale Trust supports a range of projects including "Welsh based social and community projects." However, the grants are limited and are up to £2,000.

- Nineveh Charitable Trust "supports a broad range of UK-based projects and activities of benefit to the General Public, with an emphasis on promoting a better understanding of the environment and countryside, whilst facilitating improved access, education and research". Projects supported include contributing towards costs to create a wheelchair accessible healing garden (£5,000) and they have supported community and learning programmes about red squirrel conservation in Anglesey (£5,000).

A further issue for consideration is the level of detail required to support funding bids. For example, in some instances, any application for funding cannot be submitted until outline planning permission has been secured. In addition, the majority of funding organisations require the preparation of a business plan to support any funding application.

Securing funding for recreation and leisure projects is not easy, it takes time and requires significant resource investment in project and business case development. This has only got more challenging with the cuts in public expenditure in recent years.

There is also a degree of uncertainty - until June 2016 successive governments and the impact of EU (with its projected increase in membership) has had a positive influence on the sources and range of funds available to support the development of projects. However, with Brexit, there may be some significant changes to the European funding landscape which directly impact on the UK.

As noted above in our view the success of delivering the development phase of the project will rely upon identifying and applying to multiple funding bodies. **A fundraising specialist either an internal resource at Denbighshire County Council in partnership with WILD or external expertise will be needed to develop a full fundraising plan.**

7.0 Concluding remarks

The WILD concept is innovative and pioneering, with a focus on the tourism market place and wider local community. The concept combines indoor and outdoor spaces with innovative opportunities for play, learning and nature-based events and activities. WILD would make a positive to the critical mass of facilities in Denbighshire and in particular Llangollen.

However, there are a number of challenges which the project faces. The tourism marketplace is relatively seasonal in its nature and the headline population figures (within the immediate 30 minute drivetime contour) are relatively low. Additionally, the visitor attractions and wider leisure market place is very competitive and the immediate sub-region is home to a number of well-established visitor attractions, some of which are open on a seasonal basis.

It is recognised in its current format, the concept requires a high level of revenue support. It was felt that the feasibility study should explore a low key alternative option which would require less revenue support and this is set out in summary as Appendix Five.

Appendix One: Strategic policies

The strategic context for the project includes the following core policies:

The Wellbeing of Future Generations Act: this provides the key overriding principles for sustainable development in Wales summarised as follows:

- **A prosperous Wales.** An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work.

- **A resilient Wales**. A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).

- **A healthier Wales:** A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.

- **A more equal Wales:** A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio economic background and circumstances).

- **A Wales of cohesive communities:** Attractive, viable, safe and well-connected communities.

- **A Wales of vibrant culture and thriving Welsh language :** A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.

- **A globally responsible Wales:** A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.

The Environment Act gives specific duties to government and its agency, Natural Resources Wales in respect of environmental management:

- Sustainable management of natural resources is about managing these resources in a joined up way that delivers real outcomes for the environment, people, the economy and our communities. Our aim is to make the most of the opportunities that Wales' natural resources present while safeguarding and building the resilience of natural systems to continue to provide these benefits over the long term.

- Central to the Act is the need to adopt a new, more integrated approach to managing our natural resources in order to achieve long-term sustainability. The Act provides an iterative framework that ensures that managing our natural resources sustainably will be a core consideration in decision-making.

- The State of Natural Resources Report – Natural Resources Wales (NRW) must produce a report that gives an assessment of natural resources and how well we're doing to manage them in a sustainable way.

- A National Natural Resources Policy – the Welsh Government must produce a national policy that sets out the priorities, risks and opportunities for managing our natural resources sustainably. The policy will take into account the findings of the State of Natural Resources report.

- Area statements – NRW will produce a local evidence base, which helps to implement the priorities, risks and opportunities identified in the National Policy and how NRW intends to address these.

(In respect of the final point it will therefore be important to ensure NRW is fully consulted on the project).

The Welsh Government Strategy for Tourism: Partnership for growth 2013-2020 Led by Visit Wales and reviewed in 2016 the Tourism Strategy for Wales provides the basis for marketing and product development at national, destination and local level – particularly relevant policies are highlighted in **bold**:

Promoting the Brand

- Building Wales' profile; rolling out the series of Themed Marketing Years with Year of Adventure in 2016, Year of Legends in 2017, Year of Sea in 2018 (**and Year of Discovery in 2019**), underpinned by **new product experiences** and events.

- Evolving the product led approach; promoting relevant holiday types, iconic products and **distinctive destination brands and experiences** to meet market needs.

- Attracting high-growth markets; continuing to prioritise the domestic holiday market, taking a tightly targeted approach in our priority international markets of Ireland, Germany and US and focussing on partner-led and tactical opportunities in wider international markets.
- Re-focussing marketing activity; delivering an appropriate balance of marketing activities between and within each target market based around market growth potential, resource availability and opportunities to collaborate with partners.

- Targeting new high yield markets; securing additional resources to target the Business Events market, supporting Cruise Wales and golf marketing, with a view to greater private sector engagement after the Seniors Open in 2017.

- **Becoming digital-first**; developing an integrated digital gateway for Wales, improving www.visitwales.com and Visit Wales international web sites, developing the content ecosystem for Wales and growing social media communities.

- Driving spend and profitability; Visit Wales will continue to focus on increasing overall demand and interest in visiting by using digital and trade channels to filter interest into leads for the industry.

Product Development and Major Events - include the following:-

- Flagship attractions; particularly those providing distinctive and unique experiences that can **attract new demand and all weather, year round visits**.

- Business and Events; products to cater for Business and Events markets capitalising on proposed Wales International Convention Centre.

- Development of **Heritage and Cultural experiences**; investment in the visitor experience and accommodation provision at landmark heritage sites.

- Food and Drink; **strengthen Wales' growing reputation as a food destination** including progressing priorities set out in the Food Tourism Action Plan.

- Utilisation of emerging technology; industry to harness new technology to **create exciting, transformative visitor experiences**.

- Attracting new high profile events and developing existing events; drawing high spending visits from outside Wales.

- **Supporting the Thematic Years with anchor events**.

People Development including:-

- Continue to influence training and apprenticeships schemes to remain in step with changing industry and customer needs.

- Drive business use of the Welsh Government Skills Gateway Business Online Support Service.

- Support destinations to achieve **World Host Destination status**.

- Progress the Learning Journeys project to develop best practise across the industry.

- Support initiatives aimed at changing perceptions of careers in tourism.

- Increase **provision of guides and local ambassadors** with suitable language skills.

Place Building and Partnerships

- Refocus support for the Destination Partnerships to drive forward key actions in line with their plans and wider strategic priorities.

- Identify destinations with market strength to be promoted as lead sub-national destination place brands.

- Review the role and support for Tourism Associations.

- Deliver the EU funded strategic tourism infrastructure investments at the eleven specified destinations across Wales.

- Strengthen the links between the Regional Fora, Destination Management Partnerships, local tourist associations and Sector Representative Industry Bodies.

- Ensure that tourism is prioritised in the plans of the Regional Economic bodies.

- Promote the new online support for the industry and develop **a sustainable approach and distinctive sense of place**.

- Provide better evidence to key decision makers at a local level to ensure budgets are protected to reflect the impacts of the visitor economy.

- Ensure that tourism needs are considered in relevant transport infrastructure developments including better connectivity via the main air and sea ports of entry, improvements to the M4, rail electrification and franchise agreements.

- Work with transport operators and carriers on route promotion to visitors.

In addition and as part of its brand roll-out, Visit Wales is launching the Wales Way promoting itineraries – initially with 3 routes based on the following transport corridors as a way of increasing confidence and awareness among first time visitors especially those from overseas: A470, (Cambrian Way), A487 (West Coast Way), A55 (North Wales Way). Llangollen and the World Heritage Site are within 40 minutes travel of the A55 main spine routes and there may be opportunities under this initiative, although visitor throughput to WILD generated from the traffic using the A55 is likely to be minimal. A watch should be kept on this initiative in respect of future routes which may be selected.

In terms of assessing its potential support for new tourism experiences Visit Wales has distilled the above into 5 *a priori* brand 'tests' which in turn provide us with a useful checklist for the project:

- ✓ Surprise and Inspire
- ✓ Change Perceptions
- ✓ Elevate Our Status
- ✓ Do Good Things
- ✓ Be Unmistakably Wales

The Children and Families (Wales) Measure 2010. This is a wide ranging Wales-specific measure which covers the following:

To make provision about contributing to the eradication of child poverty**; to provide a duty for local authorities to secure sufficient play opportunities for children**; to make provision about arrangements for participation of children in local authority decisions that might affect them; to make provision about child minding and day care for children; to make provision establishing integrated family support teams and boards; to make provision about improving standards in social work for children and persons who care for them; to make provision about assessing the needs of children where their parents need community care services or have health conditions that affect the needs of the children; and for connected purposes.

The highlighted section in the measure places a duty on all Local Authorities to assess whether play and recreation provision for all children of all abilities is sufficient and to keep that assessment up to date

Denbighshire County Councils' Economic and Community Ambition Strategy 2013-2023. In summary the Strategy identifies the following desired outcomes across 6 themes. Again we have **highlighted** where we feel WILD can make a contribution to the Strategy:

'We believe that Denbighshire will be better placed to achieve its vision for Economic & Community Ambition if we concentrate our efforts, and those of our partners, into working to deliver:

The right Infrastructure for Growth

1. We have effective transport connections that enable people to access jobs, and businesses to access markets/customers
2. We have modern digital and voice communication networks that meet the needs of businesses, residents and visitors
3. We have a good and readily available supply of appropriate business premises and **land that supports** established businesses to grow and **new businesses to start up**

Businesses that are Supported and Connected

1. We have easy to understand, accessible and high quality business support services available for established and new businesses

2. We have a strong local business community that benefits from being well connected, both with each other and with opportunities outside the county
3. Denbighshire County Council's procurement activity benefits local businesses and residents

Maximised Economic Strengths/Opportunities

1. **We build on the strengths of our tourism** and agricultural sectors and encourage them to make increasingly strong contributions to Denbighshire's economy
2. **We exploit new opportunities for growth**, with an initial focus on the Manufacturing, Energy & Environmental Technologies and **Creative Industries** sectors
3. **We encourage growth in the Social Enterprise sector to deliver alternative and complementary opportunities for services and jobs**

A High Quality Skilled Workforce

1. **Denbighshire's residents are well skilled, and equipped to benefit from jobs and opportunities that arise**
2. **Employment rates across Denbighshire are improved**, with significant reductions in youth unemployment in particular
3. Denbighshire's businesses have easy access to a workforce with the skills needed for businesses to be successful and grow
4. **Denbighshire has a strong culture of enterprise and entrepreneurship**

Vibrant Towns and Communities

1. **Denbighshire's towns are vibrant and prosperous**, and ready to meet the challenges of the future
2. **Denbighshire's rural communities are economically sustainable**, now and in the future
3. The number of communities and households in Denbighshire experiencing deprivation is reduced

A Well Promoted Denbighshire

1. **Denbighshire is recognised as a great place to live** and is successful in attracting people to move to or remain living in its towns and communities
2. **Denbighshire is recognised as a great place to visit** and plays a key role in making North Wales a top 5 UK visitor destination
3. **Denbighshire is recognised as an attractive place for businesses** to be located and is successful in attracting new and retaining existing growing businesses'

Denbighshire Destination Plan 2017-2020. The plan is integrated into the overall Denbighshire's Economic Strategy above. The 4th bullet point below is particularly relevant to WILD.

The DM Action Plan seeks to achieve the following:

- Increase the number of staying visitors and high-yield visitors to the region
- Provide a memorable and high-quality experience for all visitors
- Contribute to the aim of growing Wales' market share of domestic and international tourism
- **Strike a balance between promoting our most popular sites, protecting our environment, and spreading the benefit of tourism across the whole region**

Visit Wales' "Year of" campaigns will be the focus for much of our own marketing activity and that of the local tourism trade. We will create products that are Authentic, Creative and Alive.

Key target areas are:

- Liverpool
- Manchester
- Cheshire
- Yorkshire
- Dublin
- Wales
- International markets including, Germany, USA, France and the Netherlands

Clwydian Range and Dee Valley Area of Outstanding Natural Beauty AONB Sustainable Tourism Strategy 2015-2020 and Europarc Tourism Charter. The AONB produced a Sustainable Tourism Strategy in 2015 which reflects the European Charter for Sustainable Tourism in Protected Areas and current policies in Wales on sustainable development, the environment and tourism. Four functional objectives capture the essence of the vision and direction, and build upon the objectives of the previous sustainable tourism strategy.

1. **Marketing and information**
   To raise awareness of the Clwydian Range and Dee Valley and all that it has to offer to visitors, encouraging more and longer stays year round.

2. **Product development – activities and experiences**

To develop and enhance year round visitor experiences and promotable offers based on appreciation, enjoyment and understanding of the area's special countryside and heritage assets.

3. **Business engagement**
   To encourage and assist tourism-related enterprises to develop and improve their performance, facilities, sustainability and relationship to the AONB.

4. **Visitor and place management**
   To improve, manage and monitor visitor flows and environments for tourism, spreading benefits and addressing local impacts.

Pontcysyllte and Canal World Heritage Site Management Plan. The Pontcysyllte Aqueduct and Canal was inscribed as a World Heritage Site in 2009. Its Management Plan was developed to meet its future needs and to co-ordinate the efforts of the partners – of which Denbighshire is one – in its development. The Management Plan for the World Heritage sets out a strong long term vision for its future and includes:

- To balance the needs of protection, conservation and access, the interests of the local community and the achievement of sustainable economic growth
- To attract visitors to the area
- Generate income that adds value to the local economy

Canal and River Trust: Facing the Water (10 Year Strategy). The plan gives encouragement to the WILD goals – the site offers a ready access point to the Llangollen canal and towpath.

Characteristics and Features
The World Heritage Site (WHS) is of regional, national and international importance and attracts visitors both from the UK and overseas. Over 200,000 visits are made each year to the Pontcysyllte Aqueduct itself. The Pontcysyllte Aqueduct is designated a Scheduled Ancient Monument by Cadw and English Heritage and the 11 mile corridor around it was designated a World Heritage Site by UNESCO in 2009.

As well as its important designation, this part of the network is also beautiful with stunning scenery and is exceptionally popular for boating, angling, cycling and walking. The Llangollen Canal built between 1795 and 1808 by Thomas Telford and William Jessop connects three counties and is an outstanding piece of industrial and engineering heritage. The landscape value of the site is recognised in the extension of the Clwydian Range Area of Outstanding Natural Beauty to include the Dee Valley as far as Chirk.

Strengths, Opportunities and Big Ideas

- Managing and enhancing the welcome and quality of experience for the number of visitors arriving by either boat, on foot or by bike.
- Improving awareness and access to the WHS as a whole with the development of a cohesive offer including signage and improved visitor facilities.
- Opportunity to create a visitor destination around Llangollen, Pontcysyllte Aqueduct and Chirk with the development of a Visitor Centre with links to other museums and attractions.

With partners develop a gateway to North Wales and maximise on the impressive landscape and heritage of the area.

Appendix Two: Landscape of 'visitor experiences'

Attractions seeking to appeal specifically to the young family market through all or part of their offer are identified*.

Name	Short description	Approximate distance
Llangollen Museum	Museum displaying the heritage of Llangollen, including records and photographs. Small shop with a focus on local crafts, cards and books.	1.5 miles
Horse Drawn Boats of Llangollen	Providing a range of trips along Llangollen Wharf via a horse walking alongside the canal pulling the canal boat. Seasonal operation and wheelchair accessible boats. Catering is provided via a tearoom.	1.5 miles
Dragons Den Play Centre*	Indoor soft play offer incorporating a café. Children's parties are also accommodated.	1.5 miles
Pafiliwn Llangollen Pavilion	Indoor and outdoor space with a hall seating up to 400, meeting rooms, reception, café and parking for 160.	1.7 miles
Pontcysyllte Aqueduct and Llangollen Canal	World Heritage Site includes aqueduct and an 11 mile stretch of canal	1.9 miles
Llangollen Railway*	Volunteer run heritage railway primarily steam run. The line runs 10 miles along the river Dee.	2.0 miles
Riverside Park (in Llangollen)*	Children's play area located alongside the River Dee (town centre) also includes skate park, MUGA (multi use games area) and crazy golf	
Rapid Horizons	Offers white water rafting on the River Dee and courses and coaching. Linked with another site in the Peak District.	2.0 miles
Plas Newydd*	Plas Newydd is an important heritage asset located within Llangollen with attractive gardens which incorporates a catering and meeting room offer.	2.1 miles
Trevor Hall*	Grade I listed mansion available for hire for events and weddings. Large	2.1miles

	woodland with orchard, picnic garden, children's play area and Victorian glasshouse.	
Valle Crucis Abbey	Ruins of Cistercian abbey located in Llantysilio, gift shop and refreshments available. Picnic area site, dogs welcome.	3.1miles
Horseshoe Falls	Strong heritage link to Telford which provides 12 million of gallons of water for the canal every day. Can be accessed from car park and picnic area at Llantysilio Green, via horse drawn boats or the Heritage Railway.	3.1 miles
Eliseg's Pillar	Part of a ninth-century inscribed stone erected by Cyngen, Prince of Powys.	3.3 miles
Ty Mawr*	Shop, kiosk, play area and animals.	5.3 miles
Chirk Castle	Important heritage resource managed by the National Trust incorporating gardens and wider estate. Gift shop, catering offer including a seasonal tearoom	6.9 miles
Errdig*	Stately home and associated grounds. We understand the Wolf's Den is currently closed. Play and plant offers along with catering.	10 miles
Llandegla Laser Combat	Outdoor laser tag.	10.4 miles
Techniquest in Wrexham*	Science discovery centre with 70 hands on exhibits with live science shows. Site offers birthday parties, astronomy club, toddler days and has a gift shop.	10.6miles
Alyn Waters Country Park	A Green Flag country park incorporating visitor centre, cafe and toilets. Visitor centre also offers conference and meeting rooms.	12.5 miles
Park Hall – the countryside experience*	Site offers farm with daily activities to handle animals, 5 indoor play areas, 5 outdoor play areas, multiple kids driving experiences e.g. go	11.4miles

	karts, mini land rovers, 4 museums and nature walks. There is a tea room on site.	
The Fantastic Funhouse*	Soft play with café.	13.1 miles
Loggerheads Country Park	Cafe is located on site which is open daily.	16.4 miles
Moel Famau Forest Park	Picnic area and small play area. Also acts as the starting point for trails through the forest to the summit of Moel Famau.	19.2 miles
Gorwelion Centre*	Soft play, party venue, farm shop and café. Function rooms are also available.	21.5 miles
Grosvenor Museum	A period house with a range of exhibits from Viking related through to transport.	22.0 miles
Grosvenor Park Miniature Railway	Steam and diesel hauled miniature trains on a ¼ mile circuit around lake in Grosvenor Park.	23.7 miles
Greenacres Animal Farm	Farm with animal viewing, petting, funfair rides, traction engine ride and play barn. Cafe and seasonal and adjacent campsite.	25.0 miles
Chester Ice cream farm*	Incorporates a range of children’s play areas, including Europe’s largest indoor sand and water play area. Family focus with adventure golf, farm, children's JCB diggers.	25.7 miles
Cholmondeley Castle Gardens*	Extensive gardens, cafe, children’s play area, farm shop and post office. Site is currently closed and will reopen in March 2018.	26.0 miles
Attingham Park	National Trust property with historic house and parkland. Cafe and gift shop on site with addition of a cookery school.	26.2miles

National White Water Centre	White water rafting and paddling on offer.	26.6 miles
Chester Zoo*	Benefits from recent investment in the site. Monorail and lazy river, children's play area, restaurant, picnic areas, toilets, pushchair and wheelchair friendly.	26.7 miles
Adventure Ropes Course	Site has a range of rope based activities including parachute simulator, giant swing, climbing wall & tower abseil. Also offers other activities, for example, archery, fencing and bush craft experiences. Cafe and shop onsite. Part of hotel offer.	27.4 miles
Beeston Castle	English Heritage site, castle ruins. Exhibition covers from the Neolithic period through to the Civil War. Cafe located onsite.	27.5 miles
Ditherington Flax Mill	First iron framed building in the UK range of listed buildings. Currently undergoing a major restoration.	29.7 miles
Hawkstone Park	Various routes on site to explore historic remains. A visitor centre with tea rooms. Seasonal opening - closed during winter.	30.3 miles
Go Below	Subterranean sporting experience which includes abseiling, zip lining, scrambling, traversing, boating and climbing underground Snowdonia.	31.2 mile
Delamere*	Delamere forest covers 950 hectares with Go Ape high and low ropes (Junior Tree Top) along with wider Forestry Commission offer including trails, cafe and education offer (provided by third party).	32.2 miles
Deva Roman Experience	Roman museum with fortress excavations, surrounded by reconstructed buildings to show how the Romans would have lived. Roman gallery and artefacts on display. The site has a gift shop.	32.2 miles
Home Farm Attingham	Working farm which is open to the public which also displays historic	34.4 miles

	farm. Small outdoor play area, animal food on sale to use around the site. Offers birthday parties and school trips. Tearoom selling homemade cakes.	
Greenfield Valley*	Park is a museum covering the industrial revolution. Site also has indoor soft play and several other educational play areas for children. Abbey ruins on site. Surrounded by woodland for nature walks. Events are run from the site.	37.3 miles
Runcorn Ski Centre	Runcorn Ski Centre is a small outdoor dry ski run, with 90m, 40m, and 30m slopes with 3 lifts.	37.5 miles
Brimstage Maze*	Maze made out of maize and includes 3 miles of pathways. Indoor play barn, outdoor giant pillows, karts, assault course and laser battles for children. There are coffee and snacks available in the play barn. Seasonal opening.	38.6 miles
Surf Snowdonia	Buildings on the activity product located in north Wales. Artificial 300 metre wave lake with surf school. Ste offers glamping with restaurant and bar. Soft play indoor area for toddlers. Catering is available too.	42.0 miles
Thuraston Nature Reserve	250 acres of woodland, open parkland and heathland. Catering is offered along with picnic area.	44.2 miles
Acton Scott Working Farm*	Historic working farm attraction with daily activities and special events.	44.5 miles
Shropshire Hills Discovery Centre*	30acres of meadow, skeleton replica of mammoth in ice age museum display, panoramic film of surrounding area. Tea room on site serving lunch and cakes with free Wi-Fi.	48.4 miles

Appendix Three: Attractions visited

Afon Dee
Berwyn Play Centre
Brython Brook
Cafe
Canal
Candy Cottage (Ice Cream)
Castell Dinas Bran
Chain Bridge
Conwy Castle
Dragon's Den Play Centre
Erddig
Fairy Festival
Horse drawn canal boats
Horseshoe Falls
International Eisteddfod
Iron Works
Leisure Centre (half term play session)
Llangollen itself
Llangollen railway
Plas Newydd
Railway (including Thomas the Tank Engine)
River walk
Riverside Park
Shops
The Bull
Valle Crucis Abbey

Appendix Four: Sustainable design

Shorne Wood Visitor Centre, Kent

Materials used to construct the visitor centre include locally sourced sweet chestnut (the centre is located next to an area of sweet chestnut). Other types of timber used include oak, larch and western red cedar which where possible were all locally sourced. A number of eco-features have been incorporated within the visitor centre including

- 40 square metres of photovoltaic cells
- A woodchip boiler provides the only heating for the visitor centre and uses wood from the park's services team
- Toilets use rainwater harvested onsite and the sewage is treated on site

Idle Valley Rural Learning Centre, Nottinghamshire

Eco-technology used includes 'enhanced insulation' to minimise heat loss, sun pipes and large windows to increase natural daylight and natural ventilation (which have a knock-on effect of reducing energy costs). To further reduce the Centre's environmental impact and energy costs, solar and photovoltaic panels have been installed along with a geothermal heat system and rainwater recycling.

Visitor Centre, source: FPCR Environment Design Limited, www.fpcr.co.uk

Dalby Forest Visitor Centre, North Yorkshire

The visitor centre was designed to maximise natural ventilation and natural lighting and the wall panels are wider than conventional masonry construction and provide the building with a 'super insulated' external envelope, thereby reducing heat loss.

The heat for this building is provided by a biomass boiler which runs on waste wood chip. A rainwater harvesting system is in place and the roof of the building is covered with a membrane which allows rainwater to be collected and is then used for the toilets on site. Sewage is treated in an on-site sewage treatment system.

The roof covering is made from recycled tyres and inner tubes and the reception desk is made from recycled mobile phones, yoghurt pots and wellington boots.

Appendix Five: Alternative reduced scale option – summary paper

1.0 Introduction

Following the submission of our final draft report it was recognised that the overall concept proposed for the Wenffrwd site near Llangollen would require a significant annual operational subsidy.

This is a summary paper which sets out the following information in respect of the scaled back alternative option:

- A revised "low key" concept
- The pros/cons associated with the revised option
- Indicative capital budget
- Summary financial model

2.0 The revised visitor experience

2.1 The concept

The revised concept is reduced in scale and we set out the core component elements for the visitor experience below. It is recognised that the revised offer should incorporate a ‘wow’ factor which helps to create a distinct offer in the local marketplace.

2.1 Baseline – the Pocket Park

As noted in the main report, the proposals for the Pocket Park incorporate a number of key external ‘elements’ of the visitor experience, including:

- Natural play
- Accessible trails
- Tree coppicing area
- Car parking (34 spaces)
- Outdoor events facility
- Landscaping

These elements will form the basis for the reduced-scale concept and offer an opportunity for partnership working between WILD, Denbighshire County Council and the AONB.

2.2 External spaces

The external offer builds upon the Pocket Park initiative and the reduced-scale concept will also include the following elements:

- Picnic area with outdoor shelter, which will be utilised by general visitors and small school groups.


Shelter and picnic area at RPSB Middleton Lakes

- Themed play, it is interesting to note how Chester Zoo has integrated play as an essential part of the offer and recognise its importance as a key attractor (https://play.chesterzoo.org/play-every-day/).

  Building on the natural play proposed in the Pocket Park we believe critical mass (in terms of play facilities) will be achieved by the addition of one small-scale play offer and one larger area, for example a tree-based experience. Please see photos on the following page. Each play hub would include a high quality play element and the objective will be to encourage visitors to explore the wider site.

The smaller-scale play area could be themed around STEM subjects or a climbing experience based around tree trunks. Please see examples below.


Photos kindly supplied by Pentagon Play who are a leading provider of school playground equipment.

Dinton Pastures Country Park – climbing tree trunks

Play at Picton Castle and Gardens

Play at the Madrid Rio Riverside Park

Play in the trees at Black Park

Timberplay has introduced interesting play at the Slimbridge WWT Centre, which is known as Welly Boot Land http://www.timberplay.com/projects/slimbridge-wetlands-centre/#5

Coupled with the natural play proposed in the Pocket Park this will help to create a strong play offer.

The budget allocated to play is significant and could be used to create a signature offer as part of the design process.

Low key external interpretation panels will be used to:

- Encourage visitors to explore the whole site
- Assist with the provision of informal learning through interpretation
- Increase engagement with the wider locality - bringing the history and natural environment to life and encourage visitors to explore the WHS and wider locality

Signage in the car park and other points of entry will be used to create a sense of welcome and arrival, this will help to:

- Develop a strong sense of arrival and welcome at the entrance points (including the potential pedestrian link to the canal towpath). Signage will help to inform visitors that they are visiting somewhere 'special'

- Create a positive first impression of WILD

- Provide visitors with a clear sense of the offer available at WILD

- Provide 'orientation and navigation for the specific offers at WILD

Sense of welcome at Castell Henllys

2.3 Built facilities

From the initial options appraisal, it is difficult to justify the introduction of a visitor centre without significant revenue support. However, it is felt that some form of low-key built facility which provides refreshments remains an essential part of the offer.

It will be difficult for the site to support a full cafe operation, however, it is recognised the important role a catered service will provide, particularly in terms of attracting the family market and still engage with passing motorists. The catering operation on a reduced scale will offer a range of quick service food, including but not limited to:

- Hot and cold beverages
- Ice-creams
- A range of freshly made sandwiches, paninis and baguettes
- A range of salads

- Children's lunch boxes
- Limited hot food (e.g. soup of the day, baked potatoes, hot sandwiches)
- Range of pre-packaged cakes

The emphasis will be using local produce where possible. The 'facility' to house the cafe could take various different forms from a key appropriate designed kiosk through to a low key timber chalet style of cabin or even the use of shipping containers. Please see examples below:

Examples of low key catering outlets at Pensthorpe, Norfolk, Dinton Pastures Country Park, Berkshire, London Wetland Centre and Langley Park

Images kindly provided by Happy Out - www.happyout.ie

One of the key considerations is making the catering offer secure given the relative isolation of the site and this would suggest that a shipping container kiosk offers a strong solution.

The catering offer would benefit from an external shelter or awning and patio area which would be linked to the catering outlet.

It is likely that the operation of the catering kiosk will be seasonal which would be open from Easter through to the end of September (with some limited opening hours outside of the key holiday periods).


External shelter at Historic Dockyard

There is also a need for WC (male/female and accessible toilets and baby changing facility), which could potentially be incorporated within the kiosk itself. Please see example below from Queen Elizabeth Country Park in Hampshire


Seasonal kiosk incorporating toilets – Queen Elizabeth Country Park

The current proposal for the Pocket Park indicates some 34 car parking spaces – the original proposal in the main report indicated a requirement for some 70 spaces. The number of spaces recommended for the revised option is yet to be determined. Education groups are likely to arrive by coach and as such consideration should be given to a turning point to enable coaches to drop off and pick up school and other groups.

2.4 The 'WOW' factor

It is recognised that there is a need to incorporate some form of 'wow' factor and that the offer should be different to Ty Mawr and the riverside park in Llangollen.

We feel there are two options to consider: either the introduction of an underground rabbit warren style play experience or a viewing/observation tower.

- An underground adventure of tunnels or rabbit warren would be constructed out of concrete pipes which together would provide several routes of underground discovery (some 60 metres). Where the pipes link up, small 'hubs' would be created where parts of the top of the pipe are removed and could either be covered with coloured perspex or have metal tubes inserted (creating light and sound effects). This will help to add another sensory experience to the underground adventure. The pipes would be lit with low level lighting, covered with soil and landscaped with appropriate planting. Slides could also be placed on top of the underground adventure to create an additional play element. It should be noted these will not be dug into the ground due to the previous use of the site as a landfill.

- Viewing towers have been developed in a number of different ways. From the low key wooden structure at CONKERS through to An Ceann Mòr in Loch Lomond National Park (http://www.lochlomond-trossachs.org/things-to-see/scenic-routes-viewpoints/an-ceann-mor-inveruglas/), Herdla a bird viewing platform in Norway (http://www.ljb.no/#p-Herdla-hash) and the proposal by Anders Berensson Architects to turn former electricity pylons into a viewing experience in Norra Djurgården, a park in Stockholm (http://andersberenssonarchitects.blogspot.co.uk/2016/08/power-tower.html).

  Cumulus Studio in Australia has developed a viewing tower in Tasmania, which also incorporates an adjacent food offer (https://cumulus.studio/portfolio/devils-corner/)


Photo(s) kindly supplied by Cumulus Studio https://cumulus.studio photographer: Tanja Milbourne

Subject to funding we believe that it would be beneficial to hold an architectural competition to 'design' the tower, which would provide positive PR and would help to contribute to adding the 'wow' or 'signature' element to the WILD experience.

2.5 Pros and Cons

We set out below the pros and cons associated with the revised concept.

Pros	Cons
• Simpler/less complex to deliver and manage from a day-to-day perspective • Less funding needed to secure development • Likely reduction in subsidy required to manage the offer • Still perform a role in terms of being a low-key gateway site in respect of the World Heritage Site • Still able to deliver some education programmes	• Less impact in the market place • Does not fully reflect the original Vision of WILD • More seasonal visitation patterns • Lower level of wider economic impacts

2.6 Indicative capital costs

We set out below indicative capital costs[30] related to the above initiatives.

[30] Note: Assumes Pocket Park goes ahead. Estimates are subject to site survey, preliminaries, input from a design team and QS. They exclude ground investigation, additional infrastructure/service requirements, the project team's staff costs to manage and deliver the project prior to opening and the link from the site to the towpath. We have assumed that the site is supplied by adequate services. Figures are net of VAT.

Elements	Mid-range
External areas	
Picnic area and outdoor shelter e.g. Story	£20,000
Two play features	£220,000
Interpretation and signage (low key)	£12,000
Catering + toilets	
Catering offer	
· Facility (including sub-base)	£48,000
· Equipment	£20,000
· External cover and external furniture	£40,000
Toilet facility	£100,000
Wow factor	
The underground rabbit warren adventure	£180,000
Viewing/observation tower (significantly higher if architecturally led)	alternative to above
Other	
Secure yard (use existing)	£5,000
Website	£7,000
Secure bike storage	£2,000
Car parking (additional 20 spaces)	£45,882
Sub-total	**£699,882**
Professional fees @ 10%	£69,988
Contingency @ 10%	£69,988
Cost (net of VAT)	**£839,859**

If the ambition is to introduce a waterplay feature we would recommend increasing the budget allocated to play.

Total costs are £839,859 (+VAT). This excludes one of the 'WOW' factor elements (the viewing / observation tower). If this was included alongside the underground play feature, capital costs would increase by £180,000+. Pocket Park costs are not included.

Client team to provide text on community focus in relation to this concept.

3.0 Financial summary

We set out below a visitor and financial model based on the revised concept.

Visitor model

The draw of the revised concept is considerably less than the original concept proposed and this is shown in the model below. This is reflected in the lower penetration and frequency to visit rates being applied to the model.

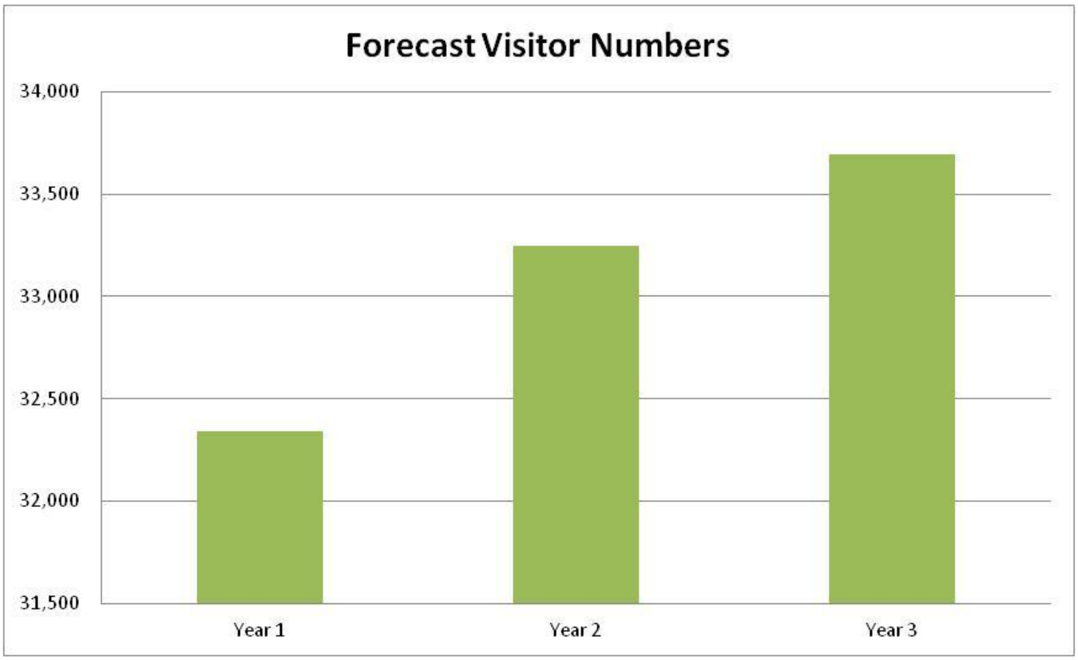
Year One – indicative visitor numbers

Market	Number	Penetration rate	Frequency to visit	Potential visitors
Residential market				
0 to 20 minutes	34,145	4.0	2.50	3,415
21 to 40 minutes	173,480	1.0	1.25	2,169
41 to 60 minutes	1,289,333	0.10	1.00	1,289
Tourism markets (Denbigshire)				
Staying visitors	1,498,000	0.40	1.00	5,992
Day visitors (beyond 1 hour)	4,456,000	0.05	1.00	2,228
Passing traffic				
Motorists / passing traffic	1,056,310	0.20	2.00	8,450
Others				
Existing Pocket Park users				5,000
Education			NA	500
Events			NA	300
Passing canal users			NA	1,200
Annual car parking pass	75		8.00	1,800
			Indicative total (Year One)	**32,343**

Due to the seasonal nature of the cafe (closure periods of weekdays during the winter months), we have shown a reduced total figure of passing traffic (in the number column).

Education figures have been reduced along with passing users using the canal or towpath.

The three year visitor model highlights some growth over a three year period.



Financial model

We set out a revised financial model based upon the reduced-scale investment package. The level of subsidy required is some £33,000 by Year 3 is considerably less than the level required for the original concept. There is a need to take into account a sinking fund (one option to consider here is developing a list of post launch projects and develop a funding strategy to pay for these initiatives).

Income	Yr 1	Yr2	Yr3
Car parking	13,943	13,827	17,004
Annual car parking pass	1,250	1,250	1,250
Catering	28,865	29,789	30,137
Catering passing vehicles	17,605	17,781	17,959
Event catering	988	1,086	1,195
Education visits	2,063	2,269	2,475
Events - third party (hire)	500	500	500
Donations	500	650	800
Total potential income	**65,713**	**67,152**	**71,320**
Staff costs			
Wild Team management/admin and support	14,040	14,040	14,040
Catering staff	23,899	24,377	24,864
Sessional education ranger	1,000	1,100	1,200
Sessional summer holiday rangers	2,688	2,856	2,856
Cleaning staff	2,904	2,962	3,021
PT bookkeeper	864	881	899
Oncosts	3,632	3,697	3,750
Total salary & wage costs	**49,026**	**49,913**	**50,631**
Cost of sales			
Catering @ 30%	14,237	14,597	14,787
Total cost of sales	**14,237**	**14,597**	**14,787**
Gross profit	**2,449**	**2,642**	**5,902**
Operational costs			
Premises and grounds costs			
Site maintenance (grounds)	4,050	4,131	4,214
Buildings and equipment maintenance	2,500	5,000	7,500
Governance costs	2,500	2,500	2,500
Rent payable to Council (tbc)			
Rates (tbc)			
Water (tbc)			
Energy	3,500	3,570	3,641
Insurance (est)	7,500	7,500	7,500
Miscellaneous premises expenditure	2,500	2,500	2,500
Sub total	**22,550**	**25,201**	**27,855**
Supplies and services			
Marketing - budget	2,500	2,500	2,500
Accountancy	1,500	1,500	1,500
Education materials	500	550	600
Car parking machine maintenance	1,000	1,000	1,000
Alarm contract			
IT	250	250	250
Phone and internet	700	714	728
Health and safety	500	510	520
General refuse collection/waste	600	612	624
Postage/printing	150	550	600
Travelling and subsistence	500	500	500
Training	500	500	500
Uniforms	400	400	400
Bank charges	1,314	1,343	1,426
Hire of equipment	500	500	500
Sub total	**10,914**	**11,429**	**11,649**
Total costs	**96,728**	**101,140**	**104,922**
Net position	**- 31,015**	**- 33,988**	**- 33,602**

Income generated will be driven by visitor numbers and in terms of income the key streams are set out below

I. Car parking
II. Catering (including catering related to events)
III. Education visits (on a reduced scale)
IV. Events hosted onsite

Car parking

The breakdown of estimated dwell-times is shown below. There is a clear difference in terms of the time visitors will spend onsite between the two models (i.e. increase in the number of people spending between 0 to 2 hours onsite and a reduction in people staying over 2 hours).

Dwell-time	**%**
Up to 2 hours	65.0
2 to 3 hours	20.0
3 to 4 hours	12.0
More than 4 hours	3.0

Car parking tariffs including VAT are shown in the table below. We have shown a marginal increase in the car parking tariffs in Year Three. Similar to the original concept it is recognised that a percentage of passing motorists who purchase items at the kiosk will not pay a car parking tariff (i.e. they receive the first 30 minutes).

As a comparator the car parking tariffs at Loggerheads Country Park are: £1 for 0 to 2 hours, up to 4 hours £2 and all day £5.

Dwell-time	Years One and Two	Year Three
Up to two hours	£1.50	£1.80
2 to 3 hours	£2.00	£2.50
3 to 4 hours	£2.50	£3.00
More than 4 hours	£2.50	£3.00

The 3 to 4 hour and more than 4 hour dwelltime brackets will attract the same tariffs.

This equates to an average tariff of £1.75 or £1.46 net of VAT (compared to £2.90, £2.42 excl. VAT in the original model) in Year 1 increasing to £2.12 or £1.77 net of VAT (compared to £3.45 and £2.88 excl. VAT in the original model) in Year Three.

In respect of existing Pocket Park users (converted to WILD visitors) and people living within 20 minutes of the site it is assumed 80% will pay the parking tariff (i.e. some would walk to WILD or stay for less than 30 minutes). Some 25% of passing motorists who stop will pay the parking charge (the remainder will stay for less than 30 minutes and not pay).

There is also an annual car parking pass @ £15.00 per annum (£12.50 net of VAT).

Catering

The catering offer would have seasonal opening periods. From Easter through to September it would be open 7 days a week (between the hours of 8am to 3pm). Then during Autumn / Winter the kiosk would be open at weekends only with slightly reduced hours.

Average spend per head is estimated at £1.50 (net of VAT £1.25) per general visitors passing motorists are likely to pay a higher spend per head @ £2.50 (net of VAT £2.08).

Costs of sales a set at 30%.

Education

We believe there is a still an opportunity for the revised WILD offer to engage with education-based visits albeit on a lower level of through and tariff per head (which is reduced to £4.95 per head (£4.13 net of VAT). The sessions would be based upon working with a sessional ranger, who would be pre-booked in advance.

The sessional rangers could also provide some non-chargeable onsite activities over the six weeks of the summer holiday period.

Events

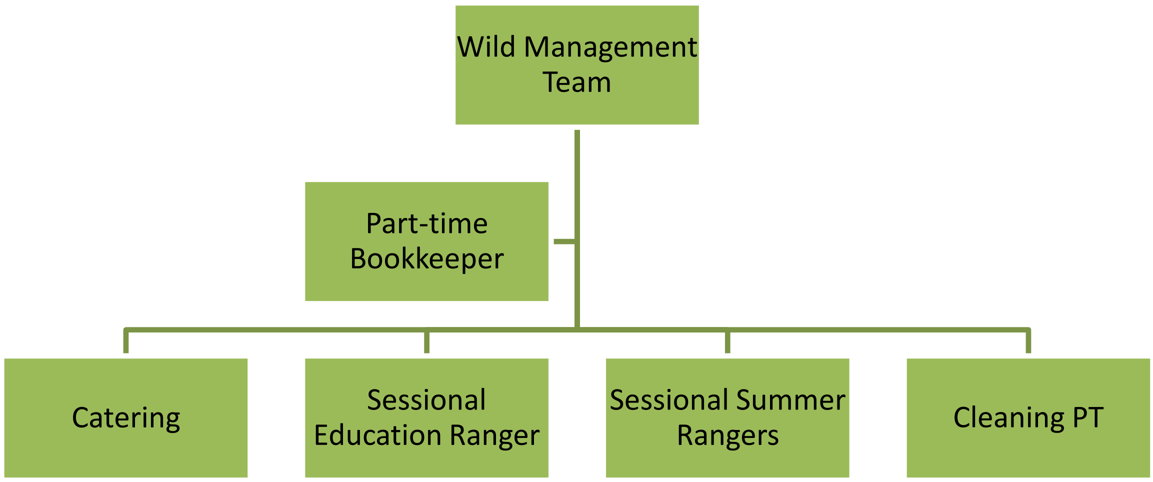
A reduced scale programme of events can still be hosted by the WILD team.

- During the summer holidays a free programme of daily activities to help generate throughput.

- Ad-hoc third-party events – whereby the site is hire by a third party to host evening events at £500 per event. We have shown one hire during Year One.

Staffing

A staff model is set out below which incorporates the WILD team taking on a direct management and supporting role in delivering the project on an on-going basis.



In terms of the support from the Wild Management Team this relates to some 22.5 hours per week @ £12.50 per hour which equates to an annual salary, based on a 40 hour week, of just under £25,000. The role would include responsibility for overseeing the administration, marketing and dealing with day-to-day operational issues which are reported by the Caterer to the Wild Team.   A key role will be focussed on setting out the long-term strategic direction for the project e.g. fund raising for reinvestment in the experience once open.

Other costs

Costs are set out in the financial model. They have been reduced to reflect the revised concept. We have increased grounds maintenance costs as a permanent ranger is not employed as part of this model.